



RETURN BIDS TO:

RETOURNER LES SOUMISSIONS À:

Bid Receiving - PWGSC / Réception des
soumissions → TPSGC

Core 0B2 / Noyau 0B2

11 Laurier St.\11, rue Laurier

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

Vendor/Firm Name and Address

Raison sociale et adresse du

fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution

Technology-Enabled Business Transformation Team
7→XY/Transformation des activités sur la technologie / 7→
XY

Terrasses de la Chaudière 4th Floor

10 Wellington Street

Gatineau

Québec

K1A 0S5

Title - Sujet DPM Service Delivery - NON-PSAB Services de transformation et de prestations numériques	
Solicitation No. - N° de l'invitation B9220-220010/A	Date 2021-08-12
Client Reference No. - N° de référence du client B9220-220010	
GETS Reference No. - N° de référence de SEAG PW-\$\$XY-001-39846	
File No. - N° de dossier 001xy.B9220-220010	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM Eastern Daylight Saving Time EDT on - le 2021-09-07 Heure Avancée de l'Est HAE	
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: Cardinal, France	Buyer Id - Id de l'acheteur 001xy
Telephone No. - N° de téléphone (613) 218-9269 ()	FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: Specified Herein Précisé dans les présentes	

Instructions: See Herein

Instructions: Voir aux présentes

Delivery Required - Livraison exigée See Herein – Voir ci-inclus	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)
RESOURCE CATEGORY - LEVEL 2 & 3
FOR
IMMIGRATION, REFUGEES AND CITIZENSHIP CANADA**

Table of Contents

PART 1 - GENERAL INFORMATION.....	4
1.1 Introduction.....	4
1.2 Summary	4
1.3 Debriefings	6
1.4 Conflict of Interest	6
PART 2 - BIDDER INSTRUCTIONS	7
2.1 Standard Instructions, Clauses and Conditions	7
2.2 Submission of Bids.....	7
2.3 Enquiries - Bid Solicitation	8
2.4 Former Public Servant.....	8
2.5 Applicable Laws.....	9
2.6 Bid Challenge and Recourse Mechanisms	9
PART 3 - BID PREPARATION INSTRUCTIONS.....	10
3.1 Bid Preparation Instructions.....	10
3.2 Section I: Technical Bid	12
3.3 Section II: Financial Bid	15
3.4 Section III: Certifications.....	16
PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION.....	17
4.1 Evaluation Procedures	17
4.2 Technical Evaluation.....	21
4.3 Financial Evaluation.....	23
4.4 Basis of Selection.....	27
PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION	29
5.2 Certifications Precedent to Contract Award and Additional Information.....	29
PART 6 - SECURITY AND FINANCIAL REQUIREMENTS	31

6.1	Security Requirement – Mandatory at bid closing.....	31
6.2	Financial Capability	31
	PART 7 - RESULTING CONTRACT CLAUSES	32
7.1	Requirement.....	32
7.2	Conflict of Interest – Other Work – Unfair Advantage	32
7.3	Task Authorization	33
7.4	Minimum Work Guarantee	36
7.5	Standard Clauses and Conditions	36
7.6	Security Requirement	37
7.7	Use of Personal Protective Equipment and Occupational Health and Safety (OHS) Guideline(s)	37
7.8	Contract Period.....	38
7.9	Authorities.....	38
7.10	Proactive Disclosure of Contracts with Former Public Servants.....	39
7.11	Payment.....	39
7.12	Invoicing Instructions	42
7.13	Certifications and Additional Information	42
7.14	Federal Contractors Program for Employment Equity - Default by Contractor	43
7.15	Applicable Laws.....	43
7.16	Priority of Documents	43
7.17	Foreign nationals (Canadian Contractor)	43
7.18	Foreign nationals (Foreign Contractor).....	43
7.19	Insurance Requirements	43
7.20	Limitation of Liability - Information Management/Information Technology	45
7.21	Joint Venture Contractor	47
7.22	Professional Services - General	47
7.23	Safeguarding Electronic Media	48
7.24	Representations and Warranties	49
7.25	Access to Canada's Property and Facilities	49
7.26	Implementation	49
7.27	Transition Services at End of Contract Period.....	49
7.28	Dispute Resolution	49

7.29 Identification Protocol Responsibilities.....	50
--	----

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 – Additional Resources Assessment Criteria
- Appendix D to Annex A – Certifications at the TA Stage
- Appendix E to Annex A - Definitions and Acronyms

-Annex B Basis of Payment

-Annex C Security Requirements Check List

-Annex D Security Guide

- Appendix A to Annex D – Baseline Security Requirement
- Appendix B to Annex D – Remote Work Protocols

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

-Attachment 3.1: Bid Submission Form

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

-Attachment 4.1: Corporate Technical Criteria

-Attachment 4.2: Core Resources Technical Criteria

List of Attachment to Part 5 (Certifications):

-Attachment 5.1: Federal Contractors Program for Employment – Certification

Forms:

-Form M1 – Corporate Capacity

-Form M2 – Billed Days

-Form R3 – Resource Placement

-Form R4 – Diversity Inclusion

-Form 5 – Electronic Payment Instruments

**BID SOLICITATION
FOR CONTRACTS AGAINST A SUPPLY ARRANGEMENT FOR TASK-
BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS)
RESOURCE CATEGORY - LEVEL 2 & 3
FOR
IMMIGRATION, REFUGEES AND CITIZENSHIP 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 and Financial 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 as listed in the Table of Contents above.

1.2 Summary

- (a) This bid solicitation is being issued to satisfy the requirement of Immigration, Refugees and Citizenship Canada (IRCC) (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 (2) contracts in Workstream 1 and up to two (2) contracts in Workstream 2. Each contract will be for three (3) years plus three (3) one (1) 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) The estimated valuation for each Workstream including option periods is approximately **\$26,0000,00.00 excluding applicable taxes** and does not represent a commitment by Canada. For contract funding allocation, please refer to article **4.4 - Basis of Selection**.
- (d) There are security requirements associated with this requirement. For additional information, consult Part 6 - Security and Financial 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.

- (e) 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 (CCoIFTA), 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).
- (f) The Federal Contractor's Program (FCP) for employment equity applies to this procurement; see Part 5 – Certifications and Additional Information, Part 7 – Resulting Contract Clauses and the attachment titled "Federal Contractors Program for Employment Equity – Certification."
- (g) This bid solicitation is to establish a contract with task authorizations for the delivery of the requirement detailed in the bid solicitation across Canada, excluding locations within Yukon, Northwest Territories, Nunavut, Quebec, and Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirement for deliveries within CLCAs areas within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador will be treated as a separate procurement, outside the resulting contract.
- (h) 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.
- (i) **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.
- (j) SA Holders that are invited to compete as a joint venture must submit a bid as that joint venture SA Holder, forming no other joint venture to bid. Any joint venture must be already qualified under the SA #EN578-055605 as that joint venture at the time of bid closing in order to submit a bid.
- (k) 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 – Strategic Transformation Project Management Office Services

TBIPS ID	RESOURCE CATEGORY	LEVEL OF EXPERTISE
Core Resources		
P.1	Change Management Consultant	3
P.5	Project Executive	3
P.9	Project Manager	3
Additional Resources		
P.1	Change Management Consultant	2
P.7	Project Coordinator	3
P.9	Project Manager	2

WORKSTREAM 2 – Architecture and Business Delivery

TBIPS ID	RESOURCE CATEGORY	LEVEL OF EXPERTISE
Core Resources		
B.1	Business Analyst – Advisory	3
B.2	Business Architect	3
B.3	Business Consult – Advisory	3
B.7	Business Transformation Architect - Advisory	3
Additional Resources		
B.1	Business Analyst	2
B.1	Business Analyst – Support	3
B.3	Business Consult – Support	3
B.7	Business Transformation Architect – Support	3
I.10	Technical Architect – Cloud	3
P.2	Enterprise Architect	3

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 may be provided in writing.

1.4 Conflict of Interest

- (a) Bidders are advised to refer to Conflict of Interest provisions at section 18 of [SACC 2003 \(2020-05-28\)](#), Standard Instructions - Goods or Services - Competitive Requirements, and Conflict of Interest provisions at section 34 of [SACC 2035 \(2020-05-28\)](#), General Condition - Higher Complexity – Services.
- (b) Without limiting in any way the provisions described in 1.4.(a) above, Bidders are advised that Canada has engaged the assistance of the following private sector contractors and resources who have provided services including the review of content in preparation of this bid solicitation and/or who have had, or may have had, access to information related to the content of the bid solicitation:

Contractor	Resources (last name, first name)
Action Personnel	Rejhon, Nina

Any bid that is received from one of the above-noted contractors, whether as a sole Bidder, joint venture or as a subcontractor to a Bidder; or for which one of the above-noted resources provided any input into the bid, will be considered to be in contravention of the Conflict of Interest clauses identified in subsection 1.4.(a), and the bid will be declared non-compliant.

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 (RFS), 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 and time indicated on page one of the bid solicitation.

Note: For bidders needing to register with epost 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 epost Connect conversation, as detailed in Standard Instructions 2003, or to send bids through an epost Connect message if the bidder is using its own licensing agreement for epost Connect

- (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 identified below, at the email address identified below, no later than 5 working days before the bid closing date. Enquiries received after that time may not be answered.

France Cardinal
Supply Team Leader
Technology-Enabled Major Projects Procurement Directorate
Public Services and Procurement Canada
10 Wellington Street, 4th floor
Gatineau, Quebec, K1A 0H4
france.cardinal@tpsgc-pwgsc.gc.ca

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

2.6 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.
- (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:
- (i) Office of the Procurement Ombudsman (OPO)
 - (ii) 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 submit their electronic 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/1/2003/25#transmission-by-facsimile>

(b) **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.

(c) **Canada's Policy on Green Procurement:** In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process. See the Policy on Green Procurement (<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573>). To assist Canada in reaching its objectives, Bidders should:

- (i) use paper containing fibre certified as originating from a sustainably-managed forest and/or containing a minimum of 30% recycled content; and
- (ii) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, and using staples or clips instead of cerlox, duotangs or binders.

(d) **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.
- (e) **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) **Security Clearance:** Bidders are requested to submit the following security information for each of the proposed Core Resources with their bids on or before the bid closing date:

SECURITY INFORMATION	
Name of individual as it appears on security clearance application form	
Level of security clearance obtained	
Validity period of security clearance obtained	
Security Screening Certificate and Briefing Form file number	

If the Bidder has not included the security information in its bid, the Contracting Authority will provide an opportunity to the Bidder to submit the security information during the evaluation period. If the Bidder has not submitted the security information within the period set by the Contracting Authority, its bid will be declared non-responsive.

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

- a. **Corporate Mandatory Technical Criteria:** For a given Workstream, the technical bid must substantiate the compliance with the specific articles of Mandatory Technical Criteria listed in Attachment 4.1, and provide Form M1 and Form M2, which are the requested format for providing the substantiation for Mandatory Technical Criteria WS1M-1, WS1M-2, WS2M-1 and WS2M-2, where applicable. 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.
- b. **Corporate Point-Rated Technical Criteria:** For a given Workstream, the technical bid must substantiate the compliance with the specific articles of Point-Rated Technical Criteria listed in Attachment 4.1, and provide Form R3, and Form R4, which is the requested format for providing the substantiation for Point-Rated Technical Criteria WS1R-3, WS1R-4, WS2R-3, and WS2R-4, where applicable. 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.

- (iv) **For Proposed Resources:** For a given Workstream, the technical bid must include résumés for the Core Resources as identified in Attachment 4.2, Core Resource Technical Criteria. The same individual must not be proposed for more than one Resource Category or more than one Workstream.
- a. **Resources Mandatory Technical Criteria:** The résumés must substantiate the compliance with the specific articles of each Mandatory Technical Criteria as identified in in Attachment 4.2 Core Resource Technical Criteria (including any educational requirements, work experience requirements, and professional designation or membership requirements). The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the proposed resource will meet the requirements and carry out the required Work. Simply stating that the proposed resources comply is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be considered non-responsive and disqualified.
- b. **Resources Point-Rated Technical Criteria:** The résumés must substantiate the compliance with the specific articles of each Point-Rated Technical Criteria as identified in in Attachment 4.2 Core Resource Technical Criteria. The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the proposed resource will meet the requirements and carry out the required Work. Simply stating that the proposed resource comply is not sufficient. Where Canada determines that the substantiation is not complete, the proposed resource will be rated accordingly.

With respect to the proposed resources:

- (A) Proposed resources may be employees of the Bidder or employees of a subcontractor, or these individuals may be independent contractors to whom the Bidder would subcontract a portion of the Work (refer to Part 5, Certifications).
- (B) For educational requirements for a particular degree, designation or certificate, PWGSC will only consider educational programs that were successfully completed by the resource by the time of bid closing. If the degree, designation or certification was issued by an educational institution outside of Canada, the Bidder is requested to provide a copy of the results of the academic credential assessment and qualification recognition service issued by one of the members of the Alliance of Credential Evaluation Services of Canada (ACESC). If the Bidder has not included the copy of the results in its bid, the Contracting Authority will provide an opportunity to the Bidder to submit it during the evaluation period. If the Bidder has not submitted the copy of the results within 2 working days of the request by the Contracting Authority, its bid will be declared non-responsive if the requirement is under mandatory criteria or its bid will be rated accordingly if the requirement is under rated criteria. Bidders should note that in addition to providing a copy of the results of the academic credential assessment and qualification recognition service, Bidders are also required to provide a copy of the original degree, designation, certificate or any other document required as per the bid solicitation as proof of education.
- (C) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of bid closing and must continue, where applicable, to be a member in good standing of the profession or membership throughout the evaluation period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this solicitation. If the entity is not specified, the issuer

must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued. If the degree, diploma or certification was issued by an educational institution outside of Canada, the Bidder is requested to provide a copy of the results of the academic credential assessment and qualification recognition service issued by one of the members of the Alliance of Credential Evaluation Services of Canada (ACESC). If the Bidder has not included the copy of the results in its bid, the Contracting Authority will provide an opportunity to the Bidder to submit it during the evaluation period. If the Bidder has not submitted the copy of the results within 2 working days of the request by the Contracting Authority, its bid will be declared non-responsive if the requirement is under Mandatory Technical Criteria or its bid will be rated accordingly if the requirement is under Point-Rated Technical Criteria. Bidders should note that in addition to providing a copy of the results of the academic credential assessment and qualification recognition service, Bidders are also required to provide a copy of the original degree, designation, certificate or any other document required as per the bid solicitation as proof of professional designation or membership.

- (D) For work experience, PWGSC will not consider experience gained as part of an educational program, except for experience gained through a formal co-operative program at a post-secondary institution.
- (E) For any requirements that specify a particular time period (e.g., 2 years) of work experience, PWGSC will disregard any information about experience if the technical bid does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
- (F) For work experience to be considered by Canada, the technical bid must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the qualification requirements, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.

(v) **Customer Reference Contact Information:**

- (A) The Bidder must provide customer references for each Reference Contract and Reference Project as defined in Appendix E to Annex A - Definitions and Acronyms. The customer reference must each confirm, if requested by PWGSC, the facts identified in the Bidder's bid, as required by each specific Technical Criteria.
- (B) The form of question to be used to request confirmation from customer references is as follows:

(C)

"Has [the Bidder] provided your organization with (details of the Criteria as required for Reference Contract and Reference Project)

☐ *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.*

(D)

For each customer reference, the Bidder must provide the reference information as defined under Reference Contract and Reference Project in Appendix E to Annex A - Definitions and Acronyms. 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. 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.

- (vi) **Corporate Profile:** The Bidder is requested to provide a corporate profile, which should include an overview of the Bidder and any subcontractors, and/or authorized agents of the Bidder that would be involved in the performance of the Work on the Bidder's behalf. The Bidder is requested to provide a brief description within ten (10) pages, of its size, corporate structure, years in business, business activities, major customers, number of employees and their geographic presence. This information is requested for information purposes only and will not be evaluated.

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, for any such 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
 - (ii) the rate bid for level two must be the same or higher than the rate bid for level one.
- (d) **All Costs to be Included:** The financial bid must include all costs for the requirement described in the bid solicitation for the entire Contract Period, including any option periods. 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.

Note to Bidders: *If Canada receives 4 or fewer Bids [the same number of bids as in the article entitled "Phased Bid Compliance Process"] by the bid solicitation closing date, the above sub-article entitled "Blank Prices" will not apply.*

- (f) **Electronic Payment of Invoices – Bid:** If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Form 5 - Electronic Payment Instruments, to identify which ones are accepted. If Form 5 - Electronic Payment Instruments is not completed, it will be considered as if Electronic Payment Instruments are not being accepted for payment of invoices. Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

3.4 Section III: Certifications

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

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 the requirement or a given Workstream as applicable 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.
- (c) 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.

- (d) 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.
- (e) 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).
- (f) 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 Corporate Mandatory Technical Criteria are described in Article 2.3 Corporate Mandatory Evaluation Criteria for Workstream 1 and in Article 3.3 Corporate Mandatory Evaluation Criteria for Workstream 2 under Attachment 4.1 - Corporate Technical Criteria. The Resources Mandatory Technical Criteria are described under each resource category under Article 2.1 for Workstream 1 resources and Article 2.2 for Workstream 2 resources under Attachment 4.2 - Core Resource Technical Criteria.
- (iii) If the Phased Bid Compliance Process applies, it will apply only to Corporate Mandatory Technical Criteria identified by the superscript (^{PB}). Corporate Mandatory Technical Criteria not identified by the superscript (^{PB}) will not be subject to the Phased Bid Compliance Process.

Corporate Mandatory Technical Criteria for Workstream 1- Strategic Transformation Project Management Office Services are identified as following:

No.	Mandatory Criteria
WS1M-1 ^{PB}	Corporate Capacity
WS1M-2 ^{PB}	Billed Days
WS1M-3 ^{PB}	Client Manager
WS1M-4	Proposed Resources
WS1M-5	Human Resources Strategy
WS1M-6 ^{PB}	Contract Management Plan

Corporate Mandatory Technical Criteria for Workstream 2 - Architecture and Business Delivery are identified as following:

No.	Mandatory Criteria
WS2M-1 ^{PB}	Corporate Capacity
WS2M-2 ^{PB}	Billed Days
WS2M-3	Certifications
WS2M-4 ^{PB}	Client Manager
WS2M-5	Proposed Resources
WS2M-6	Human Resources Strategy
WS2M-7 ^{PB}	Contract Management Plan

(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 - Corporate Technical Criteria and Attachment 4.2 – Core Resource Technical Criteria under Point-Rated Technical Criteria.
- (c) **Number of Resources Evaluated:**
Only a certain number of resources identified as ‘Core Resources’ per Resource Category will be evaluated as part of this bid solicitation as identified in Attachment 4.2 – Core Resource Technical Criteria. Additional Resources will only be assessed after contract award once specific tasks are requested of the Contractor. After contract award, the Task Authorization process will be in accordance with Part 7 – Resulting Contract Clauses, 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 Bidder will have 1 working day to submit the name of a new contact. That contact will again be given 5 working days to respond once Canada sends its reference check request.
- (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 CORE RESOURCE CATEGORY:** The Contracting Authority will establish, for each period and each Core 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 Core 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:

$$\frac{\text{Lowest proposed firm per diem rate Within the median band limits}}{\text{Bidder's proposed firm per diem rate Within the median band limits}} \times \text{Maximum Points Assigned at Table 1 or Table 2 below}$$

- (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 and Table 2 below.

TABLE 1 - MAXIMUM POINTS ASSIGNED FOR WORKSTREAM 1					
Resource Categories	Initial (3 Year Contract Period)	Option Period 1	Option Period 2	Option Period 3	Total Points
Change Management Consultant, Level 3	25	25	25	25	100
Project Executive, Level 3	25	25	25	25	100
Project Manager, Level 3	25	25	25	25	100
Change Management Consultant, Level 2	25	25	25	25	100
Project Coordinator, Level 3	25	25	25	25	100
Project Manager, Level 2	25	25	25	25	100
TOTAL	150	150	150	150	600

TABLE 2 - MAXIMUM POINTS ASSIGNED FOR WORKSTREAM 2					
Resource Categories	Initial (3 Year Contract Period)	Option Period 1	Option Period 2	Option Period 3	Total Points
Business Analyst – Advisory, Level 3	25	25	25	25	100
Business Architect, Level 3	25	25	25	25	100
Business Consultant – Advisory, Level 3	25	25	25	25	100
Business Transformation Architect – Advisory, Level 3	25	25	25	25	100
Business Analyst, Level 2	25	25	25	25	100
Business Analyst – Support, Level 3	25	25	25	25	100
Business Consultant – Support, Level 3	25	25	25	25	100
Business Transformation Architect – Support, Level 3	25	25	25	25	100
Technical Architect – Cloud, Level 3	25	25	25	25	100
Enterprise Architect, Level 3	25	25	25	25	1000
TOTAL	250	250	250	250	1000

- (iii) **STEP 3 - FINANCIAL SCORE:** Points allocated under STEP 2 for each period and Core 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 3 - EXAMPLE OF A FINANCIAL EVALUATION USING METHOD A:							
Resource Category	Max. Points	Bidder 1		Bidder 2		Bidder 3	
		Year 1	Year 2	Year 1	Year 2	Year 1	Year 2
Programmer	150 (75 pts. per year)	\$400.00	\$400.00	\$420.00	\$450.00	\$450.00	\$450.00
Business Analyst	100 (50 pts. per year)	\$600.00	\$600.00	\$600.00	\$620.00	\$650.00	\$820.00
Project Manager	50 (25 pts. per year)	\$555.00	\$900.00	\$750.00	\$800.00	\$700.00	\$800.00
TOTAL	300						
STEP 1 - Establishing the lower and upper median band limits for each year and each resource category							
(Median 1)	For the Programmer Resource Category, the year 1 median would be \$420.00. The lower median band limit would be \$378.00 and higher median band limit would be \$546.00.						
(Median 2)	For the Programmer Resource Category, the year 2 median would be \$450.00. The lower median band limit would be \$405.00 and higher median band limit would be \$585.00.						
(Median 3)	For the Business Analyst Resource Category, the year 1 median would be \$600.00. The lower median band limit would be \$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 \$800.00. The lower median band limit would be \$720.00 and higher median band limit would be \$1,040.00.						
STEP 2 - Points Allocation:							
Bidder 1:							
Programmer Year 1 = 75 points (lowest rate within the lower and upper median band limits)							
Programmer Year 2 = 0 points (outside the lower and higher median band limits)							
Business Analyst Year 1 = 50 points (lowest rate within the lower and upper median band limits)							
Business Analyst Year 2 = 50 points (lowest rate within the lower and upper median band limits)							
Project Manager Year 1 = 0 points (outside the lower and higher median band limits)							
Project Manager Year 2 = 22.22 points (based on the following calculation = (Lowest rate of \$800.00 / Bidder's proposed rate of \$900.00) Multiplied by 25 pts)							
Bidder 2:							
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 = 75.00 points (lowest rate within the lower and upper median band limits)							
Business Analyst Year 1 = 50 points (lowest price within the lower and upper median band limits)							
Business Analyst Year 2 = 48.39 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$620.00) Multiplied by 50 pts)							
Project Manager Year 1 = 23.33 points (based on the following calculation = (Lowest rate of \$700.00 / Bidder's proposed rate of \$750.00) Multiplied by 25 pts)							
Project Manager Year 2 = 25 points (lowest price within the lower and upper median band limits)							
Bidder 3:							
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 = 75 points (lowest rate within the lower and upper median band limits)							
Business Analyst Year 1 = 46.15 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$650.00) Multiplied by 75 pts)							

Business Analyst Year 2 = 0 points (outside the lower and higher median band limits)	
Project Manager Year 1 = 25 points (lowest price within the lower and upper median band limits)	
Project Manager Year 2 = 25 points (lowest price within the lower and upper median band limits)	
STEP 3 - Financial Score:	
Bidder 1:	$75 + 0 + 50 + 50 + 0 + 22.22 =$ Total Financial Score of 197.22 points out of a possible 300 points
Bidder 2:	$71.43 + 75 + 50 + 48.39 + 23.33 + 25 =$ Total Financial Score of 293.15 points out of a possible 300 points
Bidder 3:	$66.67 + 75 + 46.15 + 0 + 25 + 25 =$ Total Financial Score of 237.82 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 Core 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:
- | | | |
|---|---|-----------------------------|
| <u>Lowest proposed firm per diem rate</u> | x | Maximum Points Assigned |
| Bidder's proposed firm per diem rate | | at Table 1 or Table 2 above |
- The Bidder with the lowest proposed firm per diem rate will be allocated the applicable maximum points assigned at Table 1 or Table 2 above.
- (ii) **STEP 2 - FINANCIAL SCORE:** Points allocated under STEP 1, for each period and each Core 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 National Capital Region* in the relevant core resource category, where those services were provided for at least three (3) months within the eighteen (18) 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 at Annex A 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 at Annex A 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 at Annex A 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

Note to Bidders: *if a bidder is selected for award of more than one Workstream, Canada reserves the right to award one contract for all the Workstreams awarded to that bidder.*

(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 Technical 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:
- $$\frac{\text{Technical Score}}{\text{Maximum Technical Points (Bidders, please refer to the sum of maximum technical points for Corporate Technical Criteria at Attachment 4.1 and Core Resource Technical Criteria at Attachment 4.2, for each Workstream)}} \times 70 = \text{Total Technical Score}$$
- (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	$98/187 \times 100 = 52.41$	\$5,241,000.00
2 nd ranked	89	$89/187 \times 100 = 47.59$	\$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.

5.2 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) Professional Services Resources

- (i) By submitting a bid, the Bidder certifies that, if it is awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives.
- (ii) By submitting a bid, the Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

- (iii) If a Bidder has proposed any individual who is not an employee of the Bidder, by submitting a bid, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

(c) 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 AND FINANCIAL REQUIREMENTS

6.1 Security Requirement – Mandatory at bid closing

- (a) At the date of bid closing, the following conditions must be met:
- (i) the Bidder must hold a valid organization security clearance / Facility Security Clearance as indicated in Part 7 - Resulting Contract Clauses;
 - (ii) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses and in the table below:

Workstream	Facility Security Clearance	Resource's Requirement
Work Stream 1 – Strategic Transformation Project Management Office Services	Secret	Reliability or Secret
Work Stream 2 – Architecture and Business Delivery	Secret	Reliability or Secret

- (b) 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.
- (c) 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. If a bidder is selected for award of more than one Workstream, Canada reserves the right to award one or more contracts for all the Workstreams awarded to that bidder.

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 Immigration, Refugees and Citizenship Canada (IRCC).
- (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 or Project 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 Conflict of Interest – Other Work – Unfair Advantage

In order to protect the integrity of any future procurement process related to this contract, the Contractor is advised and agree that Canada may reject any future bid related to any future procurement for Phase III of the Digital Platform Modernization project in the following circumstances:

- (a) If the Contractor, his employees, any Contractor Team Member, any of its subcontractors, any of their respective employees or former employees advisors, consultants or representatives engaged in respect of this contract and any person controlled by or that is under common control of the Contractor was involved in any manner in the following:
 - (i) Preparation, review, participation, information providing, or advice on procurement related activities, including, but not limited to procurement documents, such as Statement Of Work (SOW), Statement Of Requirement (SOR), Evaluation Criteria, or any additional activities related to a project or procurement process or strategy;
- (b) If the Contractor or any Contractor Team Member, any of his respective employees or former employees, any of its subcontractors, any of their respective employees or former employees had

access to information related to future RFP that was not available to other and that would, in Canada's opinion, give or appear to give the Contractor an unfair advantage;

- (c) If the Contractor acts as an advisor or provides any third party with privileged information obtained in the performance of its work. Canada will disqualify any bid from the Contractor (or any entity that either controls or is controlled by the Contractor or, together with the Contractor, is under the common control of a third party, as well as such third party) (for contracts or categories described in this clause), in respect to which Canada determines, at its sole discretion, that the Contractor's involvement in this Contract, whether direct or indirect, has resulted in a real or apparent conflict of interest or unfair advantage over other suppliers for the work subject to the solicitation;
- (d) If its work under the subject Contract involved access to information that would for any reason create a real or apparent conflict of interest or unfair advantage over other potential suppliers for any resulting contract(s), on any other work stream for the Work performed under its Contract, the Contractor, its employees, subcontractors or affiliates;
- (e) The experience acquired by any Contractor Team Member, any of his respective employees or former employees, any of its subcontractors, any of their respective employees or former employees who is providing or has provided the goods and services describe in the Response will not, in itself, be considered by Canada as conferring an unfair advantage or creating a conflict of interest. This Contractor remains however subject to the criteria established above;
- (f) Where Canada intends to reject a Bid under Clause 7.2, the Contracting Authority will inform the Bidder and provide the Bidder an opportunity to respond before making a final decision. Bidders who are in doubt about a particular situation should contact the Contracting Authority before consider itself to be in Conflict of interest nor to have an unfair advantage. By submitting a bid, Bidder represents that it does not consider itself to be in Conflict of Interest nor to have an unfair advantage. The Bidder acknowledges that it is within Canada's sole discretion to determine whether a conflict of interest, unfair advantage or an appearance of Conflict of Interest or unfair advantage exists.

7.3 Task Authorization

- (a) **As-and-when-requested Task Authorizations:** The Work or a portion of the Work to be performed under the Contract will be on an "as-and-when-requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract. The Contractor must not commence work until a validly issued TA has been issued by Canada and received by the Contractor. The Contractor acknowledges that any work performed before such issuance and receipt will be done at the Contractor's own risk.
- (b) **Allocation of Task Authorizations:** More than one contract has been awarded for this requirement. Canada reserves the right to allocate the issuance of any Task Authorizations issued under this series of contracts in accordance with method described below. Canada reserves the right to modify these TA processes but will notify the Contractors in advance prior to making any changes.
 - (i) Where Canada intends to issue a TA for the same or similar work to all contractors, Canada will request a response to the TA from all of the contractors and may direct a TA to each; or
 - (ii) Where Canada intends to issue a TA to one or more but not all Contractors, Canada will request a response to the TA from the Contractor(s) and may direct a TA to one or more Contractors. If applicable, this will be done in only an exceptional basis and Canada will endeavour to ensure principals of fairness will apply such as to make such TAs count as a "turn" taken by the contractor in the TA rotation process described above.

- (c) **Assessment of Resources Proposed at TA Stage:** Processes for issuing, responding to and assessing Task Authorizations are further detailed in Appendices A, B, C, D and E 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 Appendix B of 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.
 - (iii) In addition to the foregoing, it is expected that TAs may include additional contractual terms related to the Work.
- (e) **Contractor's Response to Draft Task Authorization:** The Contractor must provide to the Technical Authority, within five (5) working days of receiving the draft Task Authorization (or within any longer time period specified in the draft TA), a quotation with the proposed total price for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment at Annex B specified in the Contract, as well as its corresponding proposed resource(s) in accordance with Appendix A to Annex A of the Contract. The Contractor's quotation must be based on the rates set out in the Contract. The Contractor will not be paid for preparing or providing its response or for providing other information required to prepare and validly issue the TA.
- (f) **Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:**
- (i) To be validly issued, a TA must include the following signatures:
 - (A) for any TA, inclusive of revisions, with a value less than or equal to \$400,000.00 (excluding Applicable Taxes), the TA must be signed by:
 - (1) the Project Authority; and
 - (2) the Procurement Authority, and
 - (3) the Contractor.
 - (B) for any TA, inclusive of revisions, with a value greater than this amount, a TA must include the following signatures:
 - (1) the Project Authority; and

- (2) the Procurement Authority,
- (3) the Contractor; and
- (4) the Contracting Authority.

Any TA that does not bear the appropriate signatures 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. By providing written notice to the Contractor, the Contracting Authority may suspend the Client's ability to issue TA's at any time, or reduce the dollar value threshold described in subarticle (A) above; any suspension or reduction notice is effective upon receipt.

(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 in at least three (3) instances has either not responded or has not submitted a valid response when sent a draft TA. 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 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 - Basis of Payment.

7.4 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 1% of the Maximum Contract Value (excl. applicable taxes) on the date the contract is first issued.
- (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 10 business days of Contract award.

7.5 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.

7.6 Security Requirement

The following security requirements (SRCL Common # 19 and related clauses provided by the Contract Security Program) as set out under Annex "B" to the Supply Arrangement EN578-170432, applies to and forms part of the Contract.

(a) SECURITY REQUIREMENT FOR CANADIAN SUPPLIERS FOR WORKSTREAM 1 AND WORKSTREAM 2:

PWGSC FILE No. B9220-220010

1. The contractor/offeror must, at all times during the performance of the contract/standing offer, hold a valid facility security clearance at the level of secret, issued by the Contract Security Program (CSP), Public Works and Government Services Canada (PWGSC).
2. The contractor/offeror personnel requiring access to **protected/classified** information, assets or sensitive work site(s) must **each** hold a valid personnel security screening at the level of **reliability status or secret** as required, granted or approved by the CSP, PWGSC.
3. The Contractor/Offeror **must not** remove any **protected/classified** information or assets from the identified work site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction.
4. Subcontracts which contain security requirements are **not** to be awarded without the prior written permission of the CSP, PWGSC.
5. The Contractor/Offeror must comply with the provisions of the:
 - a) Security Requirements Check List in Annex C;
 - b) Security guide in Annex D.
 - c) *Contract Security Manual* (Latest Edition). CSP website: Security requirements for contracting with the Government of Canada, located at www.tpsgc-pwgsc.gc.ca/esc-src

7.7 Use of Personal Protective Equipment and Occupational Health and Safety (OHS) Guideline(s)

- (a) The Contractor must comply with Government of Canada onsite requirements in respect of Personal Protective 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.

7.8 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 (3) 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 three (3) additional one (1) year period(s) under the same terms and conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions set out in 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.

7.9 Authorities

(a) **Contracting Authority (to be identified at contract award)**

The Contracting Authority for the Contract is:

Name: _____

Title: _____

Public Works and Government Services Canada

Procurement Branch

Directorate: _____

Address: _____

Telephone: _____

E-mail address: _____

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) **Project Authority (to be identified at contract award)**

The Project Authority for the Contract is:

Name: _____

Title: _____

Organization: _____

Address: _____

Telephone: _____

E-mail address: _____

The Project 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 Project Authority; however, the Project 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) Procurement Authority (Procurement representative from IRCC) - (to be identified at contract award)

The Procurement Authority for the Contract is:

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

The Procurement Authority is the representative of the department or agency for whom the Work is being carried out under the Contract. The Procurement Authority is responsible for the implementation of tools and processes required for the administration of the Contract. The Contractor may discuss administrative matters identified in the Contract with the Procurement Authority however the Procurement Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of Work can only be made through a contract amendment issued by the Contracting Authority.

(d) Contractor's Representative (to be identified at contract award)

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

7.10 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.

7.11 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) Professional Services provided under a Task Authorization with a Firm Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor the firm price set out in the Task Authorization (based on the firm, all-inclusive per diem rates set out in Annex B - Basis of Payment), Applicable Taxes extra.
- (iii) Competitive Award:** The Contractor acknowledges that the Contract has been awarded as a result of a competitive process. No additional charges will be allowed to compensate

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

associated with the validly issued Task Authorization in accordance with the payment provisions of the Contract if:

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

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

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

Direct Deposit (Domestic and International)

Note to Bidders: the Electronic Payment Instrument(s) indicated by the Bidder in Form 5 – Electronic Payment Instruments will be included in any resulting contract

(f) **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.

(g) **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 (2) consecutive months or for three (3) 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 (5) 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 (3) 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.
- (h) **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

7.12 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 forward one (1) copy to the Technical Authority, and one (1) copy to the Contracting Authority.

7.13 Certifications and Additional Information

- (a) Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, any 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.

7.14 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.

7.15 Applicable Laws

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

7.16 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) General Conditions 2035 (2020-05-28), Higher Complexity - Services;
- (c) 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 - Additional Resources Assessment Criteria;
 - (iv) Appendix D to Annex A - Certifications at the TA stage;
 - (v) Appendix E to Annex A - Definitions and Acronyms
- (d) Annex B, Basis of Payment;
- (e) Annex C, Security Requirements Check List
- (f) Annex D, Security Guide
- (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 on _____ "or" as amended _____ (to be inserted upon date(s) of clarification(s) or amendment(s) if applicable.)

7.17 Foreign nationals (Canadian Contractor)

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.*

7.18 Foreign nationals (Foreign Contractor)

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

7.19 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. It does not release the Contractor from or reduce its liability under the Contract.
- (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.

7.20 Limitation of Liability - Information Management/Information Technology

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

-
- (A) any infringement of intellectual property rights to the extent the Contractor breaches the section of the General Conditions entitled "Intellectual Property Infringement and Royalties";
 - (B) physical injury, including death.
 - (ii) The Contractor is liable for all direct damages caused by the Contractor's performance or failure to perform the Contract affecting real or tangible personal property owned, possessed, or occupied by Canada.
 - (iii) Each of the Parties is liable for all direct damages resulting from its breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of its unauthorized disclosure of the other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.
 - (iv) The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (i)(A) above.
 - (v) The Contractor is also liable for any other direct damages to Canada caused by the Contractor's performance or failure to perform the Contract that relate to:
 - (A) any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including any applicable taxes) for the goods and services affected by the breach of warranty; and
 - (B) Any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (B) of the greater of .75 times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the cell titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$1,000,000.00.In any case, the total liability of the Contractor under subparagraph (v) will not exceed the total estimated cost (as defined above) for the Contract or \$1,000,000.00, whichever is more.
 - (vi) If Canada's records or data are harmed as a result of the Contractor's negligence or willful act, the Contractor's only liability is, at the Contractor's own expense, to restore Canada's records and data using the most recent back-up kept by Canada. Canada is responsible for maintaining an adequate back-up of its records and data.
- (c) **Third Party Claims:**
- (i) Regardless of whether a third party makes its claim against Canada or the Contractor, each Party agrees that it is liable for any damages that it causes to any third party in connection with the Contract as set out in a settlement agreement or as finally determined by a court of competent jurisdiction, where the court determines that the Parties are jointly and severally liable or that one Party is solely and directly liable to the third party. The amount of the liability will be the amount set out in the settlement agreement or determined by the court to have been the Party's portion of the damages to the third party. No settlement agreement is binding on a Party unless its authorized representative has approved the agreement in writing.
 - (ii) If Canada is required, as a result of joint and several liability or joint and solidarily liable, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite Sub-article (i), with respect to special, indirect, and consequential damages of third parties covered by this Section, the Contractor is only liable for reimbursing Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of a third
-

- party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.
- (iii) The Parties are only liable to one another for damages to third parties to the extent described in this Sub-article (c).

7.21 Joint Venture Contractor

- (a) The Contractor confirms that the name of the joint venture is _____ 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.*

7.22 Professional Services - General

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

Replacement of Specific Individuals

- (i) If the Contractor is unable to provide the services of any specific individual identified in the Contract to perform the services, the Contractor must within five working days of

having this knowledge, the individual's departure or failure to commence Work (or, if Canada has requested the replacement, within ten working days of Canada's notice of the requirement for a replacement) provide to the Contracting Authority:

- (A) the name, qualifications and experience of a proposed replacement immediately available for Work; and
- (B) security information on the proposed replacement as specified by Canada, if applicable.

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

- (ii) Subject to an Excusable Delay, where Canada becomes aware that a specific individual identified under the Contract to provide services has not been provided or is not performing, the Contracting Authority may elect to:

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

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

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

7.23 Safeguarding Electronic Media

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

7.24 Representations and Warranties

The Contractor made statements regarding its own and its proposed resources' experience and expertise in its bid that resulted in the award of the Contract and the issuance of 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.

7.25 Access to Canada's Property and Facilities

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

7.26 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 (ten) working days after the Contract is awarded. All costs associated with establishing itself to provide the professional services are the responsibility of the Contractor.

7.27 Transition Services at End of Contract Period

The Contractor acknowledges that the nature of the services provided under the Contract requires continuity and that a transition period may be required at the end of the Contract. The Contractor agrees that Canada may, at its discretion, extend the Contract by a period of two months under the same conditions to ensure the required transition. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment. The Contracting Authority will advise the Contractor of the extension by sending a written notice to the Contractor at least 20 calendar days before the contract expiry date. The extension will be evidenced for administrative purposes only, through a contract amendment.

7.28 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](#)".

7.29 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

Workstream 1 - Strategic Transformation Project Management Office Services / Workstream 2 – Architecture and Business Delivery Services

2.0 SCOPE

The scope of this requirement is for the provision of support services in the National Capital Region (NCR) on an 'as and when requested' basis via a Task Authorization (TA) process. The Contractor's proposed resources must perform the tasks and meet all the deliverables required to support augmenting daily operations capabilities, support various sector Projects and initiatives being undertaken in the Transformation and Digital Solutions Sector (TDSS), within different Branches of IRCC. The Projects and initiatives may be originated from TDSS or from other IRCC sectors that impact TDSS at some capacity.

3.0 OBJECTIVE

Immigration, Refugees and Citizenship Canada (IRCC) requires the services of multiple organizations with expertise in rapidly developing and implementing digital solutions, supporting technologies, and IM/IT transformation. The objective of this contract is to obtain the professional services resources for multiple streams of work to support the business needs, growth, expansion, changes and enhancements at IRCC. These proposed resources must support different Projects and initiatives across the department.

4.0 BACKGROUND

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

Many of the above Programs are currently supported by in-person or paper-based processes. Those processes that do include some automation are supported by aging IT systems. IRCC is working towards updated and new strategies, processes, and digital systems to cope with the rapid change it is undergoing. These include updating systems and processes for internal staff, partner organizations and re-thinking and re-designing how IRCC provides its services to its clients within Canada and around the world, leveraging digital processes wherever possible thus minimizing the need for in-person interaction or paper-processes for the safety of IRCC's staff, our clients and community.

The Transformation and Digital Solutions Sector (TDSS) at IRCC is leading efforts across the department to ensure that IRCC is technologically enabled to meet growing pressures from rising immigration volumes, emerging risks and threats, and increasing client expectations. TDSS is the forefront of IRCC's transformation in defining the digital strategy for IRCC, particularly the use of current and emerging technologies to support the wider IRCC transformation initiatives.

Within the TDSS, the Digital Strategy Branch (DSB) is one of the branches at the forefront of IRCC's transformation in its role defining the digital strategy for IRCC, particularly the use of current and emerging technologies to support the wider IRCC transformation initiatives. DSB provides broad directional guidance for information architecture and information management, data analytics, Enterprise Architecture, cloud computing, and innovation and experimentation initiatives leveraging technology. DSB also leads IRCC's Digital Platform Modernization (DPM) Program that seeks to establish a modern digital platform to eventually replace the Global Case Management System (GCMS).

IRCC is seeking to build a new digital platform that will help deliver a world class client experience, achieve operational excellence and enhance Program integrity. Over the next three years, IRCC plans to first de-risk and reduce “technical debt”, to establish secure cloud connectivity, and to develop key building blocks of the future system, including reimagined business processes. Within 5-7 years, IRCC aims to have an Enterprise-Wide platform that delivers new capabilities for all business lines.

The following Key technology capabilities only apply to Workstream 2:

DSB has identified that IRCC requires professional services to assist with the implementation and maintenance of an integrated automation platform that has both attended (desktop) and unattended (server based) robots with centralized logging, which ensures that all actions, activities, and interactions are captured. This allows IRCC optimal flexibility to design high value automations to adhere to and maintain its robust governance and auditability, which is critical to IRCC’s mandated operations. Contractor engagement is intended to limit risk and exposure, and to further define corporate strategy for use of this modern technology, which is evolving quickly across multiple branches of IRCC. Required Key technology capabilities include:

- Tools and technologies to increase our operational capacities to address immediate manual processing limitations;
- Robotic Process Automation (RPA) capabilities to deal with reduction in agent capacity, address anticipated surge in volumes and allow agents to address more complex situations.

5.0 DIVERSITY INCLUSION

IRCC is committed to making our Department more inclusive for everyone and fostering an equitable workplace culture that values diversity and creates an environment that is welcoming and rewarding for all. We encourage the businesses that work with us to reflect these values. More information can be found at: <https://www.canada.ca/en/government/publicservice/wellness-inclusion-diversity-public-service/diversity-inclusion-public-service2.html>

6.0 IRCC CORE TECHNOLOGY INFRASTRUCTURE

6.1 IRCC’s technology infrastructure is most heavily concentrated in Ottawa – serving the needs of staff in the National Capital Region (NCR). Significant amounts of hardware and software are also installed in other offices in Canada and in overseas missions around the world. Over the course of the Contract, IRCC core technology infrastructure may change. IRCC will notify the Contractor of any changes.

6.2 Software Environment:

a) Programming Languages:

- | | |
|-----------------------|-------------|
| • Java/.NET | • COM |
| • C, C+, C++, C-sharp | • COM+/DCOM |
| • SQL | • e-Script |

b) ERP’s

- | | | |
|-----------------------------------|-------------------------|--------------------------------------|
| • Siebel CRM (Open UI) | • Erwin | • Team Foundation Server |
| • Siebel BIP | • Informatica | • Sparx Systems Enterprise Architect |
| • Oracle BI (including Publisher) | • HP Mercury LoadRunner | • SSA-Name-3 |

- Rational Suite (ClearCase, Functional Tester)
- Adobe (Central Server, LiveCycle)
- Oracle API Gateway
- Oracle GoldenGate
- Oracle Identity Management Suite

c) Integrated Development Environments:

- Visual Studio
- Eclipse

d) Operating Environments:

- MS Windows 2008
- MS Windows 7
- MS Windows 2012
- Linux (RedHat)
- OPENVMS

e) Middleware:

- Tomcat
- Biztalk
- CITRIX
- IBM WebSphere
- Jboss

f) Database Technologies:

- Oracle
- MS SQL Server
- Sybase
- MySQL

7.0 METHODOLOGIES, TOOLS, PROCESSES, TECHNICAL CAPABILITIES, AND SOLUTIONS – SECTION 7.0 TO 7.3 ONLY APPLIES TO WORKSTREAM 2:

7.1 Overview

The Contractor must provide methodologies, tools, processes, technical capabilities, and solutions as and when requested, to:

- a) **Implement Robotic Process Automation (RPA)** – including RPA solutions to rapidly automate simple, high volume processes, dealing with employee shortages as well as allowing employees to focus on more complex and sensitive cases.
- b) **Analytics Solutions** – including data analytics solutions to provide insights into operational volumes and processing capacities to allow IRCC to effectively respond to rapid changes in the Canadian and Global situation.

7.2 Implementation and Maintenance of Robotic Process Automation (RPA)

The Contractor must support the implementation and deployment of RPA solutions. The Contractor will work jointly with IRCC and the RPA vendor to support the solution.

7.3 Implementation and Deployment of Analytics Solutions

The Contractor must support the implementation and deployment of Analytics solutions. The Contractor will work jointly with IRCC.

8.0 RESOURCE REQUIREMENTS

- a. The Contractor must designate a senior management resource as a Client Manager. The Client Manager has responsibilities at an operational level, on behalf of the Contractor, for the day to day business relationship between Canada and the Contractor. The Client Manager will have a high level of interaction with GoC staff and act as the primary point of contact for Canada during the period of the Contract.
- b. The Contractor must provide the following resources and services described below, on an “as and when requested” basis through the established Task Authorizations (TA) process outlined in the Contract:
 - A single resource to work independently;
 - Multiple resources per resource category to work independently;
 - A single resource as part of, or to lead, multiple contracted resources;
 - A group of resources to act as a team;
 - Multiple resources per resource category; or
 - Multiple resources to act in any combination of the above.

8.1 Streams and Resource Categories

8.1.1 Stream 1 – Strategic Transformation Project Management Office Services

TBIPS ID	RESOURCE CATEGORY	LEVEL OF EXPERTISE
Core Resources		
P.1	Change Management Consultant	3
P.5	Project Executive	3
P.9	Project Manager	3
Additional Resources		
P.1	Change Management Consultant	2
P.7	Project Coordinator	3
P.9	Project Manager	2

8.1.2 Stream 2 – Architecture and Business Delivery

TBIPS ID	RESOURCE CATEGORY	LEVEL OF EXPERTISE
Core Resources		
B.1	Business Analyst - Advisory	3
B.2	Business Architect	3
B.3	Business Consultant – Advisory	3
B.7	Business Transformation Architect – Advisory	3

Additional Resources		
B.1	Business Analyst	2
B.1	Business Analyst – Support	3
B.3	Business Consultant - Support	3
B.7	Business Transformation Architect – Support	3
I.10	Technical Architect – Cloud	3
P.2	Enterprise Architect	3

9.0 RESOURCE TASKS

The Contractor, via its resources, must perform the tasks stated in authorized Task Authorizations and, as required, provide the deliverables associated with the stated tasks.

9.1 P.1 – *Change Management Consultant – Level 3 – Core Resource*

Tasks may include, but are not limited to the following:

- Measuring and monitoring established parameters to assess change management plan progress;
- Reporting on the early adoption, effective utilization, and proficiency to new change initiatives for impacted Stakeholders, business units, and team members;
- Providing support for the assessment of change impact and requirements;
- Communicating deviations in performance from established change standards and executing pre-defined strategies for corrective actions;
- Establishing and maintaining engagement with specialists from the human resources, training and communication groups to ensure a smooth transition to change and organization-wide successful implementation of change initiatives;
- Providing implementation support for management and steering committee(s), including logistical support and facilitation of meetings or workshops;
- Documenting Stakeholder needs and conducting Stakeholder analysis to identify communication requirements and appropriate governance;
- Developing, maintaining and executing Project communications management plans;
- Transferring functional and technical knowledge to the Project team and client staff through individual and group training, demonstrations, written instructions and documents on an ongoing basis throughout the life of the Project;
- Developing a variety of change management documents, including Stakeholder analysis;
- Providing a facilitation role for workshops and meetings;
- Analyzing and developing business critical success factors;
- Developing and maintaining specific change management plans with respect to training and orientation of staff and employees for each major change to Projects;
- Leading other functional staff to define business strategies and processes in support of transformation and change management activities;
- Creating presentations, presenting to various Stakeholders, and facilitating meetings and discussions; and
- Providing related briefings and status reports to management.

9.2 P.1 – *Change Management Consultant – Level 2*

Tasks may include, but are not limited to the following:

- Providing support for the assessment of change impacts and requirements;
- Communicating deviations in performance from established change standards and executing pre-defined strategies for corrective action to achieve full organizational adoption to change;
- Providing support for management and steering committees, including logistical support and facilitation of meetings or workshops;
- Documenting Stakeholder needs and conducting Stakeholder analysis to identify communication requirements and appropriate governance;
- Developing, maintaining, and executing Project communications management plans;
- Transferring functional and technical knowledge to the Project team and client staff through individual and group training, demonstrations, written instructions, and documents;
- Developing a variety of change management documents including Stakeholder analysis;
- Providing a facilitation role for workshops and meetings;
- Participating in change impact analysis; and
- Developing, implementing and/or coordinating plans and activities with internal Stakeholders.

9.3 P.5 – *Project Executive – Level 3 – Core Resource*

Tasks may include, but are not limited to the following:

- Reviewing practices and processes for adherence to IRCC's Project management requirements;
- Providing advice and guidance to ensure best practices, Treasury Board (TB) guidelines, and departmental management controls are maintained;
- Recommending enhancements to and supporting continued development of a Program to plan, execute, monitor and control internally assigned Projects;
- Supporting the development of TB submissions by providing accurate Program and Project level details as defined by TB policy and guidance;
- Actively engaging with internal Stakeholders to ensure the successful implementation of newly identified Projects;
- Reviewing and providing feedback for the maintenance of existing, or development of new, project charters and project management plans;
- Transferring 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(s);
- Defining and documenting Project objectives, and determine budget requirements;
- Meeting with other organizational executives to ensure all organizational (internal and external) Stakeholders are engaged and moving forward on Project and organizational goals;
- Resolving issues related to Projects;
- Preparing plans, charts, tables and diagrams to assist in analyzing or displaying problems;
- Providing related briefings and status reports to senior management.

9.4 P.9 – *Project Manager – Level 3 – Core Resource*

Tasks may include, but are not limited to the following:

- Managing several portfolio of Projects, each for an element of the Program and its associated Project team;
- Managing Projects during the development, implementation and operations start-up by ensuring that resources are made available and that the Projects are developed and are fully operational within previously agreed time, cost and performance parameters;
- Formulating statements of problems; establishing procedures for the development and implementation of significant, new or modified Project elements to solve these problems, and obtains approval thereof;

- Defining and documenting the objectives for the Projects: determining budgetary requirements, the composition, roles and responsibilities, and terms of reference for the Project teams;
- Reporting progress of the Projects on an ongoing basis and at scheduled points in the life cycle;
- Meeting in conference with Stakeholders and other Project managers and states problems in a form capable of being solved;
- Performing Project management activities as requested by the IRCC Project Management Office (PMO) in all areas of Project management (i.e.: integration, scope, time, cost, quality, human resources, communications, risk, procurement and Stakeholders);
- Preparing and ensure the development, review and maintenance of all Project artifacts throughout the life of the assigned Project (i.e.: from initiation through planning, execution, monitoring and closure);
- Meeting with Project Stakeholders, steering committees, executive sponsor(s) of assigned Projects on a regular basis to:
 - Communicate and discuss Project progress, schedule, risks, issues, budget, options and recommendations; and,
 - Present findings and seek direction.
- Creating and maintaining high level Project plans (description, tasks, priorities, timing and dependencies, resources and risks).

9.5 P.9 – *Project Manager – Level 2*

Tasks may include, but are not limited to the following:

- Managing the Project during the development, implementation and operations start up by ensuring that resources are made available and that Projects are developed and fully operational within previously agreed time, cost and performance parameters;
- Defining and documenting the objectives for Projects; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the Project team;
- Reporting progress of Projects on an ongoing basis and at scheduled points in the life cycle;
- Solving Project related problems;
- Preparing plans, charts, tables and diagrams to assist in analyzing or displaying problems;
- Interacting with other Project managers and Stakeholders in order to advance the Project, manage dependencies and communicate any item of importance;
- Helping in the creation of methodologies, templates and documentation for the development of new systems, from conception to implementation;
- Formulating statements of problems; establish procedures for the development and implementation of significant, new or modified Project elements to solve these problems, and obtain approval thereof;
- Preparing plans, charts, tables and diagrams to assist in analyzing or displaying problems;
- work with a variety of Project management tools; and
- Providing related briefings and status reports to management.

9.6 P.7 – *Project Coordinator – Level 3*

Tasks may include, but are not limited to the following:

- Assisting Project management and data processing professionals, technical users and end users in Project coordination and synchronization tasks;
- Providing support to Project Managers in operationalizing practices and procedures within Project team consistent with the quality management framework established by the IRCC PMO;
- Providing support for Project schedule and budget definition;
- Providing support in maintaining the risk/issue management plan and maintain risk/issue register;
- Developing technical specifications of goods and services to be procured;
- Providing contract administration support;
- Providing support for development and maintenance of resource plan;
- Providing support to maintain executive Project dashboard as per departmental standards;

- Providing support to establish team procedure to adhere to integrated defined change control process;
- Maintaining Project artifacts as per established document management requirements for the department;
- Maintaining and updating relevant Project information in manual and/or electronic files; Project information might include such things as Project activity schedule, status reports, correspondence;
- Communicating with Project management and data processing professionals, technical users and end users on administrative matters related to the Project; and,
- Coordinating close Project out procedures as per departmental requirements.

Workstream 2 – Architecture and Business Delivery

9.7 B.1 – Business Analyst – Advisory - Level 3 – Core Resource

Tasks may include, but are not limited to the following:

- Preparing and supporting prioritization workshops;
- Eliciting requirements using interviews, document analysis, requirements workshops, surveys, site visits, business process descriptions, use cases, scenarios, business analysis, task and workflow analysis;
- Improving the Software Development Lifecycle (SDLC) conceptual model to streamline Project stages;
- Critically evaluating information gathered from multiple sources, reconcile conflicts, decompose high-level information into details, abstract up from low-level information to a general understanding, and distinguish user requests from the underlying true business needs;
- Communicating and collaborating with external and internal clients to analyze information needs and functional requirements and deliver artifacts as needed;
- Providing a challenge function on assumptions of how to successfully execute plans;
- Working with Stakeholders and project teams to align, implement, and optimize IM/IT processes;
- Documenting additional business cases, as required, to enable the transformation of departmental IM/IT activities to meet varying requirements, including activity based costing and process re-engineering;
- Facilitating working group sessions and conducting interviews with clients to gather their functional and non-functional requirements;
- Documenting requirements for review by different Stakeholders (clients, technical staff);
- Consulting with the with departmental subject matter experts to obtain information on the technical feasibility of system requirements;
- Proposing solutions relating to business process improvements and business procedures;
- Identifying and documenting new business processes;
- Documenting recommendations in the form of mock-ups, use cases, user stories, and schedules;
- Responding to questions from the designers, developers and quality assurance analysts resulting from reviews of business requirements during design, development, and testing phases;
- Attending system walkthrough sessions with the client and developers to validate requirements and to document any requests for functional changes to the solution;
- Providing input to the Project Authority, including issues and risk management recommendations;
- Preparing and submitting briefing notes to the working groups; and,
- Validating the developed solution with the project requirements and Stakeholders.

9.8 B.1 – *Business Analyst – Support - Level 3*

Tasks may include, but are not limited to the following:

- Preparing and supporting prioritization workshops;
- Providing architecture and project management guidance;
- Eliciting requirements using interviews, document analysis, requirements workshops, surveys, site visits, business process descriptions, use cases, scenarios, business analysis, task and workflow analysis;
- Critically evaluating information gathered from multiple sources, reconcile conflicts, decompose high-level information into details, abstract up from low-level information to a general understanding, and distinguish user requests from the underlying true business needs;
- Communicating and collaborating with external and internal clients to analyze information needs and functional requirements and deliver artifacts as needed;
- Providing a challenge function on assumptions of how to successfully execute the IT Plan;
- Ensuring alignment for requirements linked to IM/IT and security;
- Documenting additional business cases, as required, to enable the transformation of departmental IM/IT activities to meet the varying requirements, including activity based costing and process re-engineering;
- Facilitating working group sessions and conducting interviews with clients to gather their functional and non-functional requirements;
- Documenting requirements for review by different Stakeholders (clients, technical staff);
- Consulting with the with departmental subject matter experts to obtain information on the technical feasibility of system requirements;
- Proposing solutions relating to business process improvements and business procedures;
- Identifying and documenting new business processes;
- Documenting recommendations in the form of mock-ups, use cases, user stories, and schedules;
- Responding to questions from the designers, developers and Quality Assurance Analysts resulting from their review of the business requirements during design, development, and testing phases;
- Attending system walkthrough sessions with the client and developers to validate requirements and to document any requests for functional changes to the solution;
- Drafting User Acceptance Test cases;
- Assisting and participating in User Acceptance Testing of the proposed solution with the client;
- Documenting issues identified in User Acceptance Testing;
- Providing input to the Project Authority, including issues and risk management recommendations;
- Preparing and submitting briefing notes to the working group and executive sponsors; and,
- Validating the developed solution with the project requirements and Stakeholders.

9.9 B.1 – *Business Analyst – Level 2*

Tasks may include, but are not limited to the following:

- Identifying opportunities for organizational improvement, and assist in their prioritization;
- Developing recommendations, and support the development and implementation of approved recommendations;
- Collecting and analyzing information and present findings on complex issues;
- Conducting and coordinating research as required, preparing briefings of results as required;
- Researching and identifying best practices;
- Critically evaluating information gathered from multiple sources, reconcile conflicts, decompose high level information into details, abstract from low-level information to general understanding, and distinguish user requests from true business requirements;
- Communicating and collaborating with internal and external Stakeholders, including facilitating group sessions as required to achieve objectives;
- Reviewing, analyzing and providing advice on business requirements, processes, strategies, and functions, delivering work products throughout a project life cycle;

- Making recommendations, and assist in developing and implementing associated solutions;
- Collecting and analyzing information and present findings on complex issues, status and other relevant matters; and,
- Creating reports and other briefing documents for senior management from various sources of information.

9.10 B.2 – *Business Architect – Level 3 – Core Resource*

Tasks may include, but are not limited to the following:

- Developing and implementing business and technology continuity plans;
- Developing and documenting a service catalogue, including service levels;
- Reporting progress of the project and developing and implementing monitoring activities and performance measurement;
- Meeting in conference with Stakeholders and other project managers and communicates issues/problems in a form capable of being solved;
- Preparing plans, charts, tables and diagrams to assist in analyzing or displaying problems;
- Developing techniques to identify and evaluate potential disruptions;
- Developing the business case for a multi-year migration strategy;
- Developing the business case and use cases for hyper convergence infrastructure;
- Advising IRCC Senior Management on a range of issues affecting the organization's ability to achieve the business objectives;
- Developing and document Statements of Requirements (SoR) for considered alternatives;
- Performing business analyses of functional requirements to identify information, procedures, and decision flows;
- Evaluating existing procedures and methods, identify and document items such as database content, structure, application subsystems;
- Designing and implementing strategies to improve efficiencies;
- Defining and documenting interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- Identifying candidate business processes for re-design, prototype potential information management solutions, provide trade-off information and suggest a recommended course of action; identify the modifications to the automated processes;
- Establishing acceptance test criteria with the client; and
- Supporting and using the selected departmental methodology.

9.11 B.3 - *Business Consultant – Advisory – Level 3 – Core Resource*

- Developing and modernizing existing departmental strategies;
- Creating schedules and cycles to complement project completion timelines;
- Facilitating meetings and workshops with multiple project Stakeholders on key requirements, project risks, and current issues;
- Gathering client requirements and documenting 'as is' and 'to be' states;
- Assisting with development of TB Submissions and schedules;
- Preparing impact assessments of modernization projects;
- Developing briefing materials related to specific projects for governance bodies;
- Developing service performance and usage metrics for newly automated systems;
- Analyzing, evaluating, and developing business processes (financial, operational, systems, etc.);
- Identifying organizational and/or project business opportunities for improvement and streamlining of business processes;
- Identifying and evaluating critical success parameters, factors and performance measurements; and
- Assisting Stakeholders with the development and implementation of business improvement processes and programs.

9.12 B.3 - *Business Consultant – Support – Level 3*

Tasks may include, but are not limited to the following:

- Analyzing, evaluating, developing business processes (financial, operational, systems, etc.);
- Identifying organizational and/or project business opportunities for improvement and streamlining of business processes;
- Identifying and evaluating critical success parameters, factors and performance measurements;
- Assisting other internal Stakeholders in development and implementation of business improvement processes and programs;
- Performing analysis of current and historical data and/or models to determine and advise Senior Management on recommendations for IM/IT spend requirements to maximize and/or optimize departmental efficiencies;
- Working with internal and external Stakeholders to develop procurement related documentation;
- Analyzing and evaluating client requirements and business goals;
- Recommending appropriate strategies and logistics to increase business opportunities;
- Creating different analytical role models appropriate to projects;
- Identifying and implementing operational business logistics;
- Conducting research and information gathering;
- Initiating structure documentation and presentation of findings;
- Identifying and documenting functional requirements, information sources, distribution paths and system specifications;
- Performing financial analyses and creating reports;
- Driving process improvements and efficiencies; and,
- Integrating best practices while evaluating business prospects, goals and objectives.

9.13 B.7 – *Business Transformation Architect – Advisory – Level 3 – Core Resource*

Tasks may include, but are not limited to the following:

- Conducting assessments of current business architectures, processes and performances;
- Ensuring consistency and integration with the organization's and government architectures and business strategies;
- Evaluating the feasibility of the business architecture and technologies related to one or more business changes;
- Creating detailed roadmaps describing the development of IM/IT business processes;
- Developing principles of operation and concept of operations;
- Identifying risks associated with the architecture and technologies and recommending risk mitigation;
- Analyzing current (as-is) processes;
- Developing target (to-be) processes;
- Developing options and gap analysis providing recommendations;
- Developing impact, risk and cost analysis;
- Advising IRCC management on trends and emerging technologies and their perceived impact on the organization's and government architectures and business strategies;
- Recommending alternative solutions, methodologies and strategies;
- Developing and/or implementing improvement plans, action plans, business plans, policies and standards;
- Managing the development and implementation of architectural improvement plans;
- Performing business analyses of functional requirements to identify information, procedures, and decision flows;
- Evaluating existing procedures and methods, identify and document items such as database content, structure, application subsystems, and developing data dictionary(ies); and
- Defining and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems.

9.14 B.7 – *Business Transformation Architect – Support – Level 3*

Tasks may include, but are not limited to the following:

- Evaluating the feasibility of the business architecture and technologies related to one or more business changes;
- Developing principles of operation and concept of operations;
- Identifying risks associated with the architecture and technologies and recommending risk mitigation;
- Advising IRCC management on trends and emerging technologies and their impact on the organization's and government architectures and business strategies;
- Recommending alternative solutions, methodologies and strategies;
- Developing and/or implementing improvement plans, business plans, policies and standards;
- Managing the development and implementation of architectural improvement plan(s);
- Defining and documenting IRCC processes for the procurement of required products and services;
- Working with partner departments to influence and streamline policy and guidance as it relates to requesting, procuring, implementing and supporting cloud products and services;
- Performing business analyses of functional requirements to identify information, procedures, and decision flows;
- Evaluating existing procedures and methods, identify and document items such as database content, structure, application subsystems, and develop data dictionary;
- Defining and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- Identifying candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes; and,
- Supporting and using the selected departmental methodologies.

9.15 I.10 – *Technical Architect – Cloud – Level 3*

- Providing options analysis and recommending a cloud migration strategy (retain, retire, repurchase, re-host, re-platform, re-factor);
- Capturing and analyzing business requirements to define technical and functional requirements.
- Implementing proof of concepts that demonstrate that the strategies recommended will work on IRCC platform which includes AWS cloud and AWS Docker Container software platform.
- Driving and using Cloud Native architecture best practices when it comes to developing and deploying applications in the Cloud;
- Using IRCC best practices, guardrails, and recommendations when it comes to architecting and designing applications for the Cloud;
- Using Security by design approach when planning a migration strategy;
- Presenting application demonstrations to Stakeholders as required;
- Building and present solution architecture documentation in support of pilots to obtain organizational project endorsements through internal processes;
- Designing solutions in compliance with the Enterprise Architecture models;
- Developing and maintaining technical/system documentation;
- Contributing to project team meetings and collaborating with the team including the project manager.
- Conducting knowledge sharing sessions with IRCC Cloud resources

9.16 P.2 – *Enterprise Architect – Level 3*

Tasks may include, but are not limited to the following:

- Evaluating Departmental IM/IT architectures, determine its consistency and integration with the organization's business and IM/IT strategies, assess the degree of its alignment with Treasury Board (TB) policies and directives;
- Creating methods for compliance architecture, such as data storage, metadata management, and change control;
- Recommending project architecture changes, including business, information, application, technology and security & privacy architectures to improve its alignment with business requirements;
- Developing project IM/IT strategic investment plans aligned with IRCC's overall Enterprise Architecture including resources, time frames and risk analysis for one and five year views;
- Assessing the feasibility of migrating from the current state to the target Enterprise Architecture and enabling technologies and identify the risks associated with migrating to the target Enterprise Architecture and technologies and make recommendations for risk mitigation;
- Modelling "what if" scenarios and recommending appropriate changes to the existing architecture and recommend alternative solutions, methodologies and strategies;
- Identifying future (to-be) business and IM/IT requirements against the current (as-is) Enterprise Architecture, perform gaps analyses and develop Enterprise Architecture migration strategies and transformation roadmaps for the proposed change implementation in the context of a multiple years vision and investment plans;
- Producing an architectural evolution plan, recommend strategies and prioritization of Enterprise Architecture evolution initiatives, and develop and propose strategic implementation of Enterprise Architecture evolution plan;
- Planning, organizing and developing IT architecture and framework strategies; maintain an awareness of departmental strategies;
- Gathering and analyzing complex technical data;
- Analyzing and conducting research on the current and future IT environment;
- Identifying IRCC's IT needs and the path of the evolution of the IT architecture;
- Utilizing research results to support recommendations to IT senior managers and to departmental clients;
- Preparing business cases to support the development, implementation and maintenance of IT architectures; and,
- Preparing cost estimates and recommendations (including cost benefit, technical and risk analysis) for equipment, software, contracts or professional services.

10.0 DELIVERABLES

The deliverables associated with this Statement of Work may include, but are not limited to the following:

- Project Plans;
- Unit Tested code;
- System Design Specifications;
- Analysis Documents;
- Completed Releases;
- Requirements Studies;
- Use Cases;
- Test Plans and Scripts;
- Architecture Variance;
- Business Context Models such as Business Use Case (BUC) Models;
- Documented results of Unit, System and Integration Test Plans;
- Prototypes and Proof of Concepts;
- Presentations and Demos on application code and platform changes;
- Preliminary Option Analysis (POA);

- Conceptual System Design (CSD);
- Technical Design Document (TDD);
- Consultation Documentation;
- Initial Project Plans (IPP) technical content;
- Development Strategy;
- Context Strategy;
- Usability Engagement Plan;
- Usability Value and Risk Assessment;
- Business User Model;
- Critical Success Factors;
- Key Performance Indicators;
- Documentation according to IRCC's set of best practices, standards and methodologies;
- Development of technical design, documentation, and procedures;
- Costing and Financial reports.

10.1 Format of Deliverables

All documentation and status reports must be submitted to the Technical Authority by email. Deliverables must be editable in a format compatible with the IRCC's desktop using the Microsoft Office Suite (e.g., Word, Excel, PowerPoint, Project and Visio).

10.2 Inspection and Acceptance

All Work performed will be subject to the inspection and acceptance by the Technical Authority. Should the Work not meet the requirements of the TA, the Contractor must correct any deficiencies and re-submit the revised Work to the Technical Authority for approval at no additional cost to IRCC.

11.0 REPORTING

In addition to the timely submission of all deliverables and fulfillment of obligations specified within the Contract and in each authorized TA, it is the responsibility of the Contractor to facilitate and maintain regular communication with the Project Authority. Communication is defined as all reasonable effort to inform the Project Authority of plans, decisions, proposed approaches, implementation, and results of Work, to ensure that the Contract is progressing well and in accordance with the requirements. Communication may include: phone calls; electronic mail; and meetings. In addition, the Contractor is to immediately notify the Project Authority of any issues, problems or areas of concern in relation to any Work completed under the Contract, as they arise.

12.0 OFFICIAL LANGUAGES

The primary language of work is English. The Contractor must complete and submit all deliverables in English. Presentations and/or meetings will be conducted in English. Any translations, if required, of materials created by the Contractor will be the responsibility of the Project Authority.

13.0 TRAVEL

Travel to, from, or within the National Capital Region (NCR) will not be reimbursed for work being performed in the NCR. Travel outside of the NCR is not required.

14.0 CLIENT SUPPORT

- 14.1 IRCC will provide access to departmental personnel in a timely manner, providing access to boardrooms and meeting rooms, and providing access to relevant documents as applicable. IRCC cannot guarantee the availability of meeting and/or boardroom.
- 14.2 Client support details will be specified in each TA, if applicable. Availability of IRCC personnel

will be between the hours of 9:00 am and 5:00 pm, Monday to Friday (excluding statutory holidays), Eastern Time.

14.3 As required for the conduct of the Work, IRCC will provide the Contractor with access to existing background information, including existing policies, procedures and work processes and tools, Project and planning documentation and Project artefacts developed by the IRCC PMO and works in progress as part of assigned Projects and related initiatives.

14.4 IRCC will provide laptops and access to the IRCC Network for all resources.

15.0 LIMITATIONS AND CONSTRAINTS

The Contractor must be ready to work with the Project Authority and other departmental personnel as required. Meetings between the Contractor and the Project Authority will be held via teleconference, videoconference or at IRCC facilities located in the National Capital Region (NCR). Contractor resources are to be available to IRCC personnel during regular business hours between the hours of 9:00 am and 5:00 pm, Monday to Friday (excluding statutory holidays), Eastern Time.

16.0 WORK LOCATION

In response to employee health and safety concerns related to the COVID-19 outbreak, IRCC has agreed that work arising from TA's may be performed remotely at the Contractor's premises. The Contractor and the Contractor's resources must follow the Remote Work Protocol as detailed in Appendix A of the Annex D - Security Guide.

In future, the Contractor may be granted access to either designated Government of Canada (GC) facilities in the NCR, dependant on current COVID protocols. IRCC cannot guarantee that resources will have an assigned office. The Contractor will be required to attend virtual and teleconference meetings from time-to-time as requested by the Project Authority. In future, the Contractor may be required to meet on location at 300 Slater St and 365 Laurier Ave in Ottawa, Ontario or another designated GC facility in the NCR.

On those occasions when access to IRCC's facilities are required outside of the aforementioned hours, the Contractor must request access permission from the Project Authority in writing and if approved, be accompanied by government personnel.

17.0 SECURITY

Security requirements will be defined in the RFP section 6.1 and 7.6 in accordance with the contract Annex C – Security Requirement Check List (SRCL) and Annex D – Security Guide.

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 five (5) 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 and the requested security clearance information. 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 at the TA Stage).
 - (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 TA requested 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 - Additional Resources Assessment Criteria to determine each proposed resource's compliance with the mandatory and rated criteria. Canada may request proof of successful completion of formal training, as well as reference information. Canada may conduct reference checks to verify the accuracy of the information provided. If reference checks are done, they will be conducted in writing by e-mail (unless the contact at the reference is only available by telephone). Canada will not assess any points or consider a mandatory criterion met unless the response is received within five (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 five (5) working days. Wherever information provided by a reference differs from the information supplied by the Contractor, the information supplied by the reference will be the information assessed. Points will not be allocated or a mandatory criteria considered as met if the reference customer is not a customer of the Contractor itself (for example, the customer cannot be the customer of an affiliate of the Contractor). Nor will points be allocated or a mandatory criteria considered as met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Contractor. Crown references will be accepted.
4. During the assessment of the resources proposed, should the references for two or more resources required under that 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 for assessment of the point rated criteria. Each resource proposed must attain the required minimum score for the point rated criteria for the applicable Resource Category. If the minimum score for any proposed resource is less than what is required, the Contractor's quotation will be found to be non-responsive.
6. 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.

Solicitation Number:
B9220-220010/A

Amendment Number:

Buyer ID:
001XY

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

TASK AUTHORIZATION (TA) FORM				
Contractor:		Contract Number:		
Commitment Number (PR#):		Financial Coding:		
Task Number:		Amendment Number:		
Issue Date:		Response required by:		
1. STATEMENT OF WORK (WORK ACTIVITIES, CERTIFICATIONS AND DELIVERABLES)				
Description of the Project / Work Required:				
 BACKGROUND TASKS DELIVERABLES RESOURCE ESSENTIAL TECHNOLOGY REQUIREMENT(S) () (To be identified in TA) () (To be identified in TA) () (To be identified in TA) () (To be identified in TA) () (To be identified in TA)				
2. PERIOD OF SERVICES		FROM (DATE):	TO (DATE):	
3. Work Location:				
4. Invoice sent to:				
6. Language Requirements:				
7. Other Conditions / Constraints:				
8. Level of Security Clearance Required for the Contractor Personnel:				
9. Contractor's Response:				
Category and Name of Proposed Resource	PWGSC Security File Number	Firm Per Diem Rate	Estimated # of Days	Total cost
Estimated Cost (A):				

Solicitation Number:
B9220-220010/A

Amendment Number:

Buyer ID:
001XY

	Applicable Taxes (B):	
	Total Maximum TA Cost (C= A + B):	
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: _____	
11. Approval – Signing Authority		
Signatures (Client)		
Name, Title and Signature of Project Authority to Sign on Behalf of IRCC (type or print)	Signature: _____ Date: _____	
Name, Title and Signature of IRCC Procurement Representative to Sign on Behalf of IRCC (type or print)	Signature: _____ Date: _____	
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: _____	
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 ADDITIONAL RESOURCES ASSESSMENT CRITERIA

To facilitate resource assessment, The Contractor should prepare and submit their proposed resources using only specific project and related information which demonstrates the required criteria. The Contractor should include the criteria number for each reference item in each résumé for ease of verifying the information. The Contractor should not include unrelated project information from the proposed resources résumé when responding to each criteria.

1.0 Workstream 1 - Additional Resources:

Change Management Consultant – Level 2

Change Management Consultant – Level 2	
MC#	Mandatory Technical Criteria
M1	<p>The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience within the past 10 years of the TA request date as a Change Management Consultant – Level 2 in accordance with the TBIPS Supply Arrangement.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A – Definitions and Acronyms.</p>
M2	<p>The Contractor must demonstrate that the proposed resource has experience within the past 5 years of the TA request date working on at least 1 IM/IT Project for a Public Client.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A – Definitions and Acronyms.</p>
M3	<p>The Contractor must demonstrate that the proposed resource holds at minimum 1 of the following Change Management Certifications:</p> <ul style="list-style-type: none">a) Proscib) Certified Change Management Professional (CCMP) <p>To demonstrate above, a valid copy of the certification must be provided with the TA proposal.</p>

Project Coordinator – Level 3

Project Coordinator – Level 3	
MC#	Mandatory Technical Criteria
M1	<p>The Contractor must demonstrate that the proposed resource has a minimum of 10 years of experience within the past 15 years of the TA request date as a Project Coordinator – Level 3 in accordance with the TBIPS Supply Arrangement.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A – Definitions and Acronyms.</p>
M2	<p>The Contractor must demonstrate that the proposed resource has experience working on at least 2 IM/IT Projects for a Public Sector client within the past 5 years of the TA request date.</p> <p>To demonstrate such experience, the Bidder must provide 2 or more Reference Project(s) as defined in Appendix E to Annex A – Definitions and Acronyms.</p>
M3	<p>The Contractor must demonstrate that the proposed resource holds a valid PMP (Project Management Professional) Certification from the Professional Management Institute (PMI) or PRINCE2 Project Management certification.</p> <p>To demonstrate above, a valid copy of the certification must be provided with the TA request.</p>

Project Manager – Level 2

Project Manager – Level 2	
MC#	Mandatory Technical Criteria
M1	<p>The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience within the past 10 years of the TA request date as a Project Manager – Level 2 in accordance with the TBIPS Supply Arrangement.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A – Definitions and Acronyms.</p>
M2	<p>The Contractor must demonstrate, that the proposed resource has experience working on at least 1 IM/IT Project for a Public Sector client within the past 2 years of the TA request date.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A – Definitions and Acronyms.</p>
M3	<p>The Contractor must demonstrate that the proposed resource holds a valid PMP (Project Management Professional) Certification from the Professional Management Institute (PMI) or PRINCE2 Project Management certification.</p> <p>To demonstrate above, a valid copy of the certification must be provided with the TA request.</p>

Work Stream 2 – Additional Resources

Business Analyst – Level 2

Business Analyst – Level 2	
MC#	Mandatory Technical Criteria
M1	<p>The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience within the past 10 years of the TA request date as a Business Analyst – Level 2 in accordance with the TBIPS Supply Arrangement.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A – Definitions and Acronyms.</p>
M2	<p>The Contractor must demonstrate that the proposed resource has experience working on a minimum of 3 IM/IT related Projects within the past 6 years of the TA request date.</p> <p>To demonstrate such experience, the Bidder must provide 3 or more Reference Project(s) as defined in Appendix E to Annex A – Definitions and Acronyms.</p>
M3	<p>The Contractor must demonstrate that the proposed resource has a minimum of 2 years of combined experience within the past 5 years of the TA request date supporting business improvement processes by performing all of the following tasks:</p> <ul style="list-style-type: none">a) Analyzing;b) Evaluating; andc) Making recommendations. <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A – Definitions and Acronyms.</p>

Business Analyst – Support, Level 3

Business Analyst – Support, Level 3	
MC#	Mandatory Technical Criteria
M1	<p>The Contractor must demonstrate that the proposed resource has a minimum of 10 years of experience within the past 15 years of the TA issuance date, performing the role of a Business Analyst – Level 3 in accordance with the TBIPS Supply Arrangement.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A – Definitions and Acronyms.</p>
M2	<p>The Contractor must demonstrate that the proposed resource has experience within the past 15 years of the TA issuance date working on a minimum of 1 IM/IT related Large Project.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A – Definitions and Acronyms.</p>
M3	<p>The Contractor must demonstrate that the proposed resource has a minimum of 5 years of combined experience within the past 10 years of the TA request date supporting business improvement processes by performing all of the following tasks:</p> <ul style="list-style-type: none">d) Analyzing;e) Evaluating; andf) Developing business processes. <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A – Definitions and Acronyms.</p>

Business Consultant – Support, Level 3

Business Consultant – Support, Level 3	
MC#	Mandatory Technical Criteria
M1	<p>The Contractor must demonstrate that the proposed resource has a minimum of 10 years of experience within the past 15 years of the TA issuance date, performing the role of a Business Consultant – Level 3 in accordance with the TBIPS Supply Arrangement.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A – Definitions and Acronyms.</p>
M2	<p>The Contractor must demonstrate that the proposed resource has a minimum of 10 years of combined experience within the past 15 years of the TA issuance date working on at least one 1 Large Project spanning at least 2 years in length supporting business improvement processes by performing all of the following tasks:</p> <ul style="list-style-type: none">g) Analyzing;h) Evaluating; andi) Developing business processes. <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined below:</p> <p>A Reference Project is defined as a Project of the Contractors proposed Resource to deliver the identified services and deliverables to a client organization. A Reference Project may encompass sub-Projects and must include the following supporting information:</p> <ul style="list-style-type: none">1. Name of the Project(s);2. Organization for which the work was performed;3. Duration of work (start and end dates in MM/YY format);4. Tasks performed; and5. Client reference (name, title, phone number or email address).

Business Consultant – Support, Level 3	
MC#	Mandatory Technical Criteria
	<p>The client reference must have been in a reporting or management role or the client's Project Authority or an authorized representative who can validate the Contractors claim. A colleague or a subordinate will not be accepted.</p> <p>Contractors are also advised that the month(s) of experience listed for a project whose timeframe overlaps that of another referenced project will only be counted once. For example, Project 1 timeframe is July 2001 to December 2001; Project 2 timeframe is October 2001 to January 2002; the total months of experience for these two project references is 7 months. 1 Reference Project may be used to demonstrate more than one criteria.</p> <p>For the 1 required referenced Large Project, the minimum duration that the resource has worked on the Large Project must be no less than 2 years. Additional supporting Reference Project(s) must be no less than 4 months.</p>
M3	<p>The Contractor must demonstrate that the proposed resource holds at minimum 1 of the following continuous improvement methodology certifications:</p> <ul style="list-style-type: none"> a) LEAN; b) Six Sigma (minimum yellow belt); or c) ISO. <p>To demonstrate above, a valid copy of the certification must be provided with the TA request.</p>

Business Transformation Architect – Support, Level 3

Business Transformation Architect – Support, Level 3	
MC#	Mandatory Technical Criteria
M1	<p>The Contractor must demonstrate that the proposed resource has a minimum of 10 years of experience within the past 15 years of the TA issuance date, performing the role of a Business Transformation Architect – Level 3 in accordance with the TBIPS Supply Arrangement.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A – Definitions and Acronyms.</p>
M2	<p>The Contractor must demonstrate that the proposed resource has a minimum of 3 years of combined experience within the past 15 years of the TA issuance date developing all of the following documentation:</p> <ul style="list-style-type: none"> a) principles of operation; and b) concepts of operations. <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A – Definitions and Acronyms.</p>
M3	<p>The Contractor must demonstrate that the proposed resource has a minimum of 3 years of combined experience within the past 15 years of the TA issuance date with all of the following tasks related to risk management:</p> <ul style="list-style-type: none"> a) Identifying risks associated with the architecture and technologies; and b) Recommending risk mitigation. <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A – Definitions and Acronyms.</p>

Technical Architect – Cloud, Level 3

Technical Architect – Cloud, Level 3	
MC#	Mandatory Technical Criteria
M1	<p>The Contractor must demonstrate that the proposed resource has a minimum of 10 years of experience within the past 15 years of the TA issuance date, performing the role of a Technical Architect – Level 3 in accordance with the TBIPS Supply Arrangement.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A – Definitions and Acronyms.</p>
M2	<p>The Contractor must demonstrate that the proposed resource has a degree from an accredited Canadian University, or equivalent, in information technology or computer science. For equivalency please refer to: http://www.cicic.ca/2/home.canada</p> <p>To demonstrate above, a copy of the degree must be provided with the TA request.</p>
M3	<p>The Bidder should demonstrate that the proposed resource holds at minimum 1 of the following certifications:</p> <ul style="list-style-type: none">a) AWS Certified Solution Architect – Associate;b) AWS Certified Cloud Practitioner; orc) Azure Solutions Architect <p>To demonstrate above, a valid copy of the certification(s) must be provided with the TA request.</p>

Enterprise Architect – Level 3

Enterprise Architect – Level 3	
MC#	Mandatory Technical Criteria
M1	<p>The Contractor must demonstrate that the proposed resource has a minimum of 10 years of experience within the past 15 years of the TA issuance date, performing the role of an Enterprise Architect – Level 3 in accordance with the TBIPS Supply Arrangement.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A – Definitions and Acronyms.</p>
M2	<p>The Contractor must demonstrate that the proposed resource has a degree from an accredited Canadian University, or equivalent, in information technology or computer science. For equivalency please refer to: http://www.cicic.ca/2/home.canada</p> <p>To demonstrate above, a copy of the degree must be provided with the TA request.</p>
M3	<p>The Contractor must demonstrate that the proposed resource holds the following certification:</p> <ul style="list-style-type: none">a) ITIL v3 Foundation <p>To demonstrate above, a valid copy of the certification must be provided with the TA request.</p>

Note to Bidders: Attachment 4.2 – Core Resources Technical Criteria will be inserted and will form part of the resulting contract.

APPENDIX D TO ANNEX A CERTIFICATIONS AT THE TA STAGE

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

1. CERTIFICATION OF EDUCATION AND EXPERIENCE

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

Print name of authorized individual & sign above

Date

2. CERTIFICATION OF AVAILABILITY OF PERSONNEL

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

Print name of authorized individual & sign above

Date

3. CERTIFICATION OF STATUS OF PERSONNEL

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

Print name of authorized individual & sign above

Date

4. CERTIFICATION OF LANGUAGE - [Choose proper options]

The Contractor certifies that the proposed resource(s) in response to this draft Task Authorization is/are *[Option 1 - Unilingual English]* 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.

[Option 2 - Bilingual] fluent in both official languages of Canada (French and English). The individual(s) proposed must be able to communicate orally and in writing in French and English without any assistance and with minimal errors.

[Option 3 - Unilingual French] fluent in French. The individual(s) proposed must be able to communicate orally and in writing in French without any assistance and with minimal errors.

Print name of authorized individual & sign above

Date

APPENDIX E TO ANNEX A DEFINITIONS AND ACRONYMS

DEFINITIONS AND ACRONYMS	
ATIP:	Access to Information and Privacy (ATIP) Online Request
AWS:	Amazon Web Services
Business Transformation:	Business Transformation is defined as making fundamental changes in how a business or organization runs. This may include personnel, processes, and technology. These transformations help organizations compete more effectively, become more efficient, or make a wholesale strategic pivot.
Change Management:	Change management is defined as a collective term for all approaches to prepare, support, and help individuals, teams, and organizations in making organizational change.
Cloud:	Cloud is defined as a global network of servers, each with a unique function. The Cloud is not a physical entity, but instead is a vast network of remote servers around the globe which are linked together and meant to operate as a single ecosystem.
Cloud Native:	Cloud native is defined as an approach to building and running applications that exploits the advantages of the cloud computing delivery model. When companies build and operate applications using a cloud native architecture, they bring new ideas to market faster and respond sooner to customer demands.
Container Platform:	Container Platform is defined as software solutions that allow you to manage containerized applications. They provide capabilities like automation, orchestration, governance, security, customization, and enterprise support for container architectures.
Enterprise Architecture:	Enterprise architecture (EA) is defined as a conceptual blueprint that defines the structure and operation of organizations. The intent of enterprise architecture is to determine how an organization can effectively achieve its current and future objectives.
Enterprise-wide:	Enterprise-wide is defined as an activity or initiative that impacts across all aspects (e.g. levels and functions) of an organization.
Impact Analysis:	Impact Analysis is defined as a detailed study of business activities, dependencies, and infrastructure. It reveals how critical products and services are delivered and examines the potential impact of a disruptive event over time.
IM/IT services:	Information Management / Information Technology
Junior Project Manager:	A Junior Project Manager is defined as a Project Manager having at least 5 years of experience that has been responsible for planning and organizing ongoing Projects. Junior Project Managers support team members with project development and execution.
KPI:	Key Performance Indicator
Large Project/Large IM/IT Project:	<p>A Large Project is defined as a project or program that meets 4 of the following 7 characteristics:</p> <ol style="list-style-type: none">1. Scope spanning multiple Programs or services involving at least one GoC or Public Sector external department or agency;2. Has a Project duration of over 12 months;3. Has a peak Project team size of over 50 people (employees and contractors);4. Supports an organization of over 5,000 users;5. Has a National impact ;6. Has multiple Stakeholder groups both internal and external; and,

DEFINITIONS AND ACRONYMS	
	7. Has an investment value of \$150 million (CAD) (including applicable taxes) or greater.
National:	National is defined as impacting operations in a minimum of 4 provinces and/or territories.
PMO:	A Project Management Office is defined as a management structure that standardizes the project-related governance processes and facilitates the sharing of resources, methodologies, tools and techniques.
Program:	Program is defined as a group of related activities that are designed and managed to meet a specific public need and are often treated as a budgetary unit.
Program Activities:	Program Activities is defined as a group of activities conducted by IRCC to deliver on its mandate as example Citizenship, Passport, Permanent Resident, etc.
Project:	A Project is defined as a specific undertaking in support of an organization's business. Projects have a defined beginning and end, with clear objectives, deliverables and outcomes.
Project Management Office (PMO):	Project Management Office is defined as a management structure that standardizes the project-related governance processes and facilitates the sharing of resources, methodologies, tools, and techniques.
Public Sector/Public Sector Client:	Public Sector is defined as Canadian Federal Department, Crown Corporation, Crown Agency, Provincial, Territorial or Municipal government environment.
Reference Contract:	<p>Reference Contract is defined as an engagement of the Bidder or the Bidder's proposed Resource (as the context dictates) to deliver the identified services and deliverables to a client organization (an organization external to and unaffiliated with the Bidder's organization). A Reference Contract may encompass services in support of 1 or more Projects, and must include the following supporting information:</p> <ul style="list-style-type: none"> • the name of the client organization; • the name of the client reference; • the client's reference title; • the client's reference telephone number or the client's reference email address; • the contract number; • the start and end dates for the initial contract period, not including amendments; • the current end date of the contract; • the total value (including applicable taxes) of the initial contract period, not including amendments; and • the total invoiced amount (including applicable taxes) for the initial contract period, not including amendments. <p>The client reference must have been in a reporting or management role or the client's Project Authority or an authorized representative who can validate the Bidder's claim. A colleague or a subordinate will not be accepted.</p>
Reference Project:	<p>A Reference Project is defined as a Project of the Bidder's proposed Resource to deliver the identified services and deliverables to a client organization. A Reference Project may encompass sub-Projects and must include the following supporting information:</p> <ol style="list-style-type: none"> 1. Name of the Project(s); 2. Organization for which the work was performed;

DEFINITIONS AND ACRONYMS	
	<p>3. Duration of work (start and end dates in MM/YY format);</p> <p>4. Tasks performed; and</p> <p>5. Client reference (name, title, phone number or email address).</p> <p>The client reference must have been in a reporting or management role or the client's Project Authority or an authorized representative who can validate the Bidder's claim. A colleague or a subordinate will not be accepted.</p> <p>Bidders are also advised that the month(s) of experience listed for a project whose timeframe overlaps that of another referenced project will only be counted once. For example, Project 1 timeframe is July 2001 to December 2001; Project 2 timeframe is October 2001 to January 2002; the total months of experience for these two project references is 7 months. One Reference Project may be used to demonstrate more than one criteria.</p> <p>Unless otherwise specified, the minimum duration of Referenced Projects that the resource has worked on must be no less than 4 months.</p>
Robotic Process Automation (RPA):	Robotic process automation is defined as a form of business process automation technology based on metaphorical software robots or on artificial intelligence /digital workers.
Senior Executive Management:	Senior Executive Management is defined as Chief Executive Officer (CEO), Chief Information Officer (CIO), Associate Deputy Minister (ADM), President, Vice President (VP), Chief Operations Officer (COO), and Chief Financial Officer (CFO) or equivalent.
Senior Project Manager:	A Senior Project Manager is defined as a Project Manager having at least 10 years of experience who is responsible for overseeing the planning and implementation of an entire project through budgeting, hiring team members, sourcing suppliers, and planning the project release.
Systems Development Life Cycle (SLDC):	Systems Development Life Cycle (SDLC) is defined as a conceptual model that describes the stages involved in an information system development project, from an initial feasibility study through maintenance of the completed application. SDLC can apply to technical and non-technical systems.
Significant size and complexity:	Significant size and complexity is defined as having a minimum of 5,000 users, across multiple Government of Canada (GoC) departments or Agencies, Crown Corporations or Provincial/Territorial Government departments or Agencies.
Single Client:	A Single Client is defined as an individual department, agency or Crown Corporation.
Stakeholder:	A Stakeholder is defined as an individual or organization that has or had influence over a Project's objectives and outcomes, is or was involved in the project delivery or project oversight, and whose interests may be affected as a result of project execution or project completion.
Statement of Requirement (SoR):	A statement of requirement is defined as a proposal to an authority, which states a business problem or an opportunity and seeks funding and approval to conduct project identification stage activities. The statement of requirements includes problem definition information which will provide context for the approving authority, as well as an initial assessment of risk and basic financial information regarding what will be produced in the next stage(s).
TDSS:	Transformation and Digital Solutions Sector

**ANNEX B
BASIS OF PAYMENT**

WORKSTREAM 1

INITIAL CONTRACT PERIOD:

Initial Contract Period		
Resource Category	Level of Expertise	Firm Per Diem Rate
Change Management Consultant	Level 3	
Project Executive	Level 3	
Project Manager	Level 3	
Change Management Consultant	Level 2	
Project Coordinator	Level 3	
Project Manager	Level 2	

OPTION PERIODS:

Option Period 1		
Resource Category	Level of Expertise	Firm Per Diem Rate
Change Management Consultant	Level 3	
Project Executive	Level 3	
Project Manager	Level 3	
Change Management Consultant	Level 2	
Project Coordinator	Level 3	
Project Manager	Level 2	

Option Period 2		
Resource Category	Level of Expertise	Firm Per Diem Rate
Change Management Consultant	Level 3	
Project Executive	Level 3	
Project Manager	Level 3	
Change Management Consultant	Level 2	
Project Coordinator	Level 3	
Project Manager	Level 2	

Option Period 3		
Resource Category	Level of Expertise	Firm Per Diem Rate
Change Management Consultant	Level 3	
Project Executive	Level 3	
Project Manager	Level 3	
Change Management Consultant	Level 2	
Project Coordinator	Level 3	
Project Manager	Level 2	

WORKSTREAM 2

* The per diem rate for the Business Analyst – Advisory category and the per diem rate for the Business Analyst – Support category must be identical.

** The per diem rate for the Business Consultant – Advisory category and the per diem rate for the Business Consultant – Support category must be identical.

*** The per diem rate for the Business Transformation Architect – Advisory category and the per diem rate for the Business Transformation Architect – Support category must be identical

INITIAL CONTRACT PERIOD:

Initial Contract Period		
Resource Category	Level of Expertise	Firm Per Diem Rate
Business Analyst – Advisory *	Level 3	
Business Architect	Level 3	
Business Consultant – Advisory **	Level 3	
Business Transformation Architect – Advisory ***	Level 3	
Business Analyst	Level 2	
Business Analyst – Support *	Level 3	
Business Consultant – Support **	Level 3	
Business Transformation Architect – Support ***	Level 3	
Technical Architect – Cloud	Level 3	
Enterprise Architect	Level 3	

OPTION PERIODS:

Option Period 1		
Resource Category	Level of Expertise	Firm Per Diem Rate
Business Analyst – Advisory *	Level 3	
Business Architect	Level 3	
Business Consultant – Advisory **	Level 3	
Business Transformation Architect – Advisory ***	Level 3	
Business Analyst	Level 2	
Business Analyst – Support *	Level 3	
Business Consultant – Support **	Level 3	
Business Transformation Architect – Support ***	Level 3	
Technical Architect – Cloud	Level 3	
Enterprise Architect	Level 3	

Option Period 2		
Resource Category	Level of Expertise	Firm Per Diem Rate
Business Analyst – Advisory *	Level 3	
Business Architect	Level 3	
Business Consultant – Advisory **	Level 3	

Solicitation Number:
B9220-220010/A

Amendment Number:

Buyer ID:
001XY

Business Transformation Architect – Advisory ***	Level 3	
Business Analyst	Level 2	
Business Analyst – Support *	Level 3	
Business Consultant – Support **	Level 3	
Business Transformation Architect – Support ***	Level 3	
Technical Architect – Cloud	Level 3	
Enterprise Architect	Level 3	

Option Period 3		
Resource Category	Level of Expertise	Firm Per Diem Rate
Business Analyst – Advisory *	Level 3	
Business Architect	Level 3	
Business Consultant – Advisory **	Level 3	
Business Transformation Architect – Advisory ***	Level 3	
Business Analyst	Level 2	
Business Analyst – Support *	Level 3	
Business Consultant – Support **	Level 3	
Business Transformation Architect – Support ***	Level 3	
Technical Architect – Cloud	Level 3	
Enterprise Architect	Level 3	

ANNEX C
SECURITY REQUIREMENTS CHECK LIST

SRCL for B9220-220010 (Workstream 1 and Workstream 2)

You can find the SRCL at the end of this document.

ANNEX D SECURITY GUIDE

Strategic Transformation Project Management Office Services / Architecture and Business Delivery Services - Security Guide

The Contractor and its employees will require access to Protected B and Secret Information under contract B9220-220010 for the Strategic Transformation Project Management Office Services / Architecture and Business Delivery Services.

1. The Contractor personnel holding a valid Reliability Status should only access Protected B information, on a need-to-know basis, as stipulated in the SRCL. The Contractor personnel requiring access to Secret information must each hold a valid Secret security clearance, granted or approved by CISC/PWGSC.

Work Stream	Facility Security Clearance	Resource Requirements
Work Stream 1 – Strategic Transformation Project Management Office Services	Secret	Reliability or Secret
Work Stream 2 – Architecture and Business Delivery Services	Secret	Reliability or Secret

2. Unscreened personnel will not be accepted for completing portions of the work under the Contract.
3. Prior to the Contractor Personnel commencing working from home;
 - a. the Baseline Security Requirements (see appendix A to Annex D) must be met and signed off by both IRCC and the Contractor's CSO including addressing all security measures [for protecting sensitive information](#) must be followed; and
 - b. ensure the Remote Work Protocols (see appendix B to Annex D) are met and adhered to by the Contractor's Personnel
4. Should the Work be performed at designated Government of Canada facilities, the following security measures and procedures must be undertaken and followed when handling sensitive information;
 - a. The work must be performed within the approved secure zone (Operations zone for Protected B and Security Zone for Secret) with all security controls in place for sensitive information.
 - b. Only appropriately cleared personnel may work on this task.
 - c. Contractors must ensure proper handling of Protected B and Secret information at all times during this contract.
 - d. Once work is completed for the day, all documents and sensitive information must be stored in government approved filing cabinets equipped with appropriate locking devices identified in the RCMP security equipment guide.
 - e. When different levels of classified and designated information are stored together, storage must comply with the standard for the most sensitive information involved.
5. Contractors holding both Reliability Status and Secret clearance must not access sensitive information other than what is identified in the Statement of Work. NOTE: The resulting contracts will be Task Authorization based. The sensitive information would be identified in any TA's.
6. Only Canadian contractors may be permitted to work on this contract. No foreign workers are required.

APPENDIX A TO ANNEX D Contractual Baseline Security Requirements

The following requirements / questions must be addressed prior to work commencing on rewarded contracts.

To be completed by Immigration, Refugees and Citizenship's Corporate Security.

Contract Number: [Contract Number](#)

Security Clearance as recognized by the Industrial Security Program:

Organization Name: [Click here to enter text.](#)

Mailing Address of Organization: [Click here to enter text.](#)

Company Security Officer: [Click here to enter text.](#)

Phone Number: [Click here to enter text.](#)

The above mentioned organization holds the following security clearances that have been verified by the Industrial Security Program at Public Services and Procurement Canada (PSPC):

Document Safeguard Capability: [Choose an item.](#)

Facility Security Clearance: [Click here to enter text.](#)

To be completed by Supplier.

Teleworking Requirements:

- I. The supplier must have a Remote Work Procedure/Protocol Policy for employees' teleworking. The documentation must be provided to Immigration, Refugees and Citizenship Canada upon request.

The supplier has a Remote Work Procedures and Protocol Policy for employees' teleworking and agrees to provide it to Immigration, Refugees and Citizenship Canada if requested.

☐ Yes ☐ No

- II. The supplier must have a Mobile Policy / Procedures for employees' teleworking such as, an IT Security Policy/Procedures. The documentation must be provided to Immigration, Refugees and Citizenship Canada upon request.

The supplier has a Mobile Policy / Procedures for employees' teleworking and agrees to provide it to Immigration, Refugees and Citizenship Canada if requested.

☐ Yes ☐ No

- III. As indicated on the Security Requirement Checklist (SRCL), the supplier requires to store, process and produce up to and including [Maximum Level of Sensitivity](#) documentation to complete the contractual requirements with Immigration, Refugees and Citizenship Canada.

- IV. The supplier approves of its employees for teleworking and storing, processing and producing up to and including [Maximum Level of Sensitivity](#).

Solicitation Number:
B9220-220010/A

Amendment Number:

Buyer ID:
001XY

- V. Will the supplier's employees completing the contractual requirements be issued Immigration, Refugees and Citizenship Canada information technology (IT) equipment (laptops)?
☐ Yes ☐ No
- VI. Do the supplier's employees have storage containers at their teleworking locations that abide by the RCMP Security Equipment Guide?
☐ Yes ☐ No
- VII. The supplier must have Transport and Transmittal Policies for employees transferring/transporting sensitive information from the supplier's facility to the teleworking locations. The documentation must be provided to Immigration, Refugees and Citizenship Canada upon request.
- The supplier has Transport and Transmittal Policies for employees' teleworking and agrees to provide it to Immigration, Refugees and Citizenship Canada if requested.
☐ Yes ☐ No

Signed by Contractor's Security Officer:

Name

Date

APPENDIX B TO ANNEX D REMOTE WORK PROTOCOLS

The following requirements must be addressed prior to work commencing on awarded Task Authorizations and followed by the Contractor Personnel.

This Appendix B sets out the Remote Work Protocols to be followed by the Parties. In response to employee health and safety concerns related to the COVID-19 outbreak, the Parties have agreed that the Contractor will implement a remote work solution in which, effective July 20, 2020, contractor personnel performing services under any Task Authorization will work remotely using the Contractor provided laptops and IRCC provided laptops.

The Parties acknowledge that implementation of a remote work model will necessarily impact the services, and agree that:

- Contractor Personnel covered by the remote work solution will be advised of the Remote Work Protocols;
- Contractor will provide training to any Contractor Personnel working remotely that covers the Remote Work Protocols;
- Any activity must be performed from Canadian jurisdiction (within Canada or a Canadian Embassy);

Contractor will be responsible for security incidents arising from the implementation of the agreed remote work solution to the extent caused by Contractor failure to comply with the Remote Work Protocols. For purposes of the agreed remote work solution, Contractor will not be responsible for complying with any security requirements that differ or conflict with the Remote Work Protocols.

Workstations:

IRCC and the Contractor will implement controls for all workstations and laptops on IRCC and Contractor provided devices, respectively, that are used in connection with service delivery and receipt incorporating the following:

- Encrypted hard drive;
- Software agent that manages overall compliance of workstation and reports a minimum on a monthly basis to a central server;
- Patching process to ensure workstations are current on all required patches;
- Ability to prevent non-approved software from being installed (e.g., peer-to-peer software);
- Antivirus with a minimum weekly scan;
- Firewalls installed;
- Data Loss Prevention tool; and
- Web filtering.

Access Control:

The Parties will comply with the following controls for their respective infrastructure:

- Enable at a minimum a one (1) step factor authentication for their respective VPNs;
- IRCC will promptly provide authentication credentials for Contractor Personnel, including any additional requirements to support IRCC's two-factor authentication;
- Promptly deactivate authentication credentials where such credentials have not been used for a period of time (such period of non-use not to exceed six months);
- Deactivate authentication credentials upon notification that access is no longer needed (e.g., employee termination, project reassignment, etc.) within two business days; and
- Manage the access controls using the least privilege access protocols where applicable.

Connectivity:

- Where Contractor Personnel connect to Contractor networks and infrastructure, the Contractor is responsible for applying the Contractor's standard technical and organizational security controls to such Contractor-provided workstation or laptop and the Contractor environment.
- Where Contractor Personnel are using Contractor or IRCC provided laptops and accessing the IRCC network, environments and systems, IRCC is responsible for applying IRCC's standard technical and organizational security controls in respect of such network, environments and systems to the IRCC's network and environments.

The Contractor cannot confirm that the wireless network used by such Contractor Personnel is protected with agreed upon security standards.

IRCC Standards:

To the extent reasonably possible, Contractor personnel working remotely will continue to abide by the applicable IRCC policies and standards in performing the Services. Such policies govern and control within the IRCC's systems and environments.

ATTACHMENT 3.1 BID SUBMISSION FORM

BID SUBMISSION FORM		
Bidder's full legal name		
Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)	Name	
	Title	
	Address	
	Telephone #	
	Fax #	
	Email	
Company Security Officer (CSO) contact information:	Name:	
	Title:	
	Address:	
	Telephone #:	
	Fax #:	
	Email:	
Bidder's Procurement Business Number (PBN) [see the Standard Instructions 2003] [Note to Bidders: <i>Please ensure that the PBN you provide matches the legal name under which you have submitted your bid. If it does not, the Bidder will be determined based on the legal name provided, not based on the PBN, and the Bidder will be required to submit the PBN that matches the legal name of the Bidder.</i>]		
Jurisdiction of Contract: Province or territory in Canada the Bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in solicitation)		
Former Public Servants See the Article in Part 2 of the bid solicitation entitled Former Public Servant for a definition of "Former Public Servant".	Is the Bidder a FPS in receipt of a pension as defined in the bid solicitation? Yes _____ No _____ If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"	
	Is the Bidder a FPS who received a lump sum payment under the terms of the Work Force Adjustment Directive? Yes _____ No _____ If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"	
Security Clearance Level of Bidder [include both the level and the date it was granted] [Note to Bidders: <i>Please ensure that the security clearance matches the legal name of the Bidder. If it does not, the security clearance is not valid for the Bidder.</i>]		
	Workstream	
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	Workstream 1	Yes/No

Solicitation Number:
B9220-220010/A

Amendment Number:

Buyer ID:
001XY

one or more Workstreams, please only indicate the Workstream covered by this bid).	Workstream 2	Yes/No
<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; and4. If the Bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation.		
Signature of Authorized Representative of Bidder		

ATTACHMENT 4.1 CORPORATE TECHNICAL CRITERIA

1.0 BIDDER INSTRUCTIONS

1.1 Reference Contract Descriptions:

In response to the mandatory and point-rated evaluation criteria, where a criterion evaluates the experience of the proposed resource(s) through written descriptions of Reference Contracts or Projects, for demonstration, the Bidder must provide written descriptions of the experience of the identified proposed resources in providing the identified services and deliverables. For clarity, demonstration must consist of more than a repetition of the text of the evaluation criteria. Bidders must clearly describe the services and deliverables provided by the proposed resources, such as describing the proposed resource's role in undertaking the tasks and delivering the services identified in the criterion within the context of the overall project and outcomes delivered for the client's project.

For example, where a criterion requires experience in a Project Management Office (PMO) supporting a transformational project, a well described response demonstrating the requirements would describe the role of the proposed resource in the work, the nature of the client's business transformation, size and scale of the project (e.g. enterprise-wide or unit-specific, nature and number of personnel consulted and impacted, impact to complementary or integrated projects, business areas or systems, etc.), deliverables, any toolsets used, etc.

A response that is lacking in detail and does not clearly demonstrate the experience of the proposed resource would not substantively address all requirements in the criterion (i.e. the response solely repeats the text of the criterion or provides minimal description and does not explain or fully describe the role of the proposed resource and the activities or outcomes of their work, or is missing demonstration of one or more of the elements listed in the criterion).

A Reference Contract may be the same as a Reference Contract used in the response to other corporate mandatory evaluation criteria.

1.2 Reference Contract Recency and Duration:

In response to the mandatory and point-rated evaluation criteria, where Reference Contract(s) are required, where indicated, each Reference Contract provided must demonstrate the minimum duration identified in the criterion, and, where indicated, must have been acquired within the time period indicated in the criterion.

Where an identified Reference Contract recency is required (e.g. completed within the last 3 years) the period of time will be calculated as of the issuance date of the RFP. Bidders must clearly demonstrate the dates during which services were provided (start and end date in Month/Year format)

1.3 Mandatory Evaluation Criteria

The mandatory evaluation criteria listed below will be evaluated on a simple Met/Not Met (i.e. responsive or non-responsive) basis. Bids that fail to meet one of the mandatory evaluation criteria will be deemed non-responsive and be given no further consideration. Each Bidder will be evaluated separately against the mandatory evaluation criteria.

Bids must demonstrate all of the mandatory evaluation criteria as described below and must include the necessary supporting documentation. If cross-referencing to another section of the Bidder's bid, Bidders should indicate page numbers to where additional substantiating information on the referenced information is provided. For definitions and acronyms mentioned in any mandatory or point rated criteria, refer to Appendix E to Annex A – Definitions and Acronyms.

2.0 WORKSTREAM 1: STRATEGIC TRANSFORMATION PROJECT MANAGEMENT OFFICE SERVICES

2.1 Evaluation Summary

No.	Mandatory Criteria	
WS1M-1 ^{PB}	Corporate Capacity	
WS1M-2 ^{PB}	Billed Days	
WS1M-3 ^{PB}	Client Manager	
WS1M-4	Proposed Resources	
WS1M-5	Human Resources Strategy	
WS1M-6 ^{PB}	Contract Management Plan	
No.	Point-Rated Technical Criteria	Maximum Points
WS1R-1	Excess Billed Days	100
WS1R-2	Client Manager Experience	15
WS1R-3	Resource Placement	30
WS1R-4	Diversity Inclusion	20
Overall Maximum Points		165
Pass Mark		115

2.2 Resource Categories (Core Resources)

TBIPS ID	CATEGORY OF PERSONNEL	LEVEL OF EXPERTISE	NO. OF RESOURCES TO BE PROPOSED AT BID CLOSING
Core Resources			
P.1	Change Management Consultant	3	1
P.5	Project Executive	3	1
P.9	Project Manager	3	1

Only the Core Resources identified above are required to be proposed at bid closing and will be evaluated against the resource mandatory and point-rated evaluation criteria identified in Attachment 4.2: Core Resources Technical Criteria. The Additional Resources identified in the Statement of Work at Annex A of this solicitation are not required to be proposed at bid closing. These resources may be requested and evaluated after contract award via a Task Authorization process outlined in the Contract. The Core Resources proposed within the Bidder's bid must meet the security requirements specified in Part 6 of the RFP at the bid closing date, while the Additional Resources must meet the security requirements specified in Contract Clause 7.6 prior to Task Authorization issuance.

2.3 Corporate Mandatory Evaluation Criteria

MTC#	Mandatory Technical Criteria (MTC)
WS1M-1 ^{PB}	<p>Corporate Capacity: Using only 1 Reference Contract, the Bidder must demonstrate its experience providing Project Management services for a Public Sector client. The identified Reference Contract must:</p> <ul style="list-style-type: none"> a) have been with a Single Client; b) have a minimum contract value of \$15,000,000 (CAD) including applicable taxes and including amendments; c) have an initial minimum contract period of 2 years; d) have been completed in the last 5 years from the issuance date of this RFP

	<p>or has been ongoing for a minimum of 6 months from the issuance date of the RFP; and</p> <p>e) have included the provision of the services of at least 2 of the following resource categories listed below (i. to iv.) in accordance with Section 7 of the Statement of Work of this bid solicitation:</p> <ul style="list-style-type: none"> i. P.1 Change Management Consultant ii. P.5 Project Executive iii. P.9 Project Manager iv. P.7 Project Coordinator <p>For the 1 Reference Contract provided, the Bidder must complete and submit Form M1 – Corporate Capacity.</p> <p>For the purpose of this criterion, the term ‘task’ includes the tasks identified in the Statement of Work at Annex A of this bid solicitation for the identified resource category. The Bidder must demonstrate at least 50% of the tasks for that resource category in Section 8 of the Statement of Work at Annex A of this bid solicitation. For example, if the SOW for a resource category identifies 15 tasks, the Bidder must use any 7 of the resource category’s SOW tasks to meet this requirement (50% of 15 = 7).</p> <p>The Bidder must have been contracted as the prime contractor for the Reference Contract provided in response to this criterion.</p>										
WS1M-2^{PB}	<p>Billed Days: The Bidder must demonstrate contract experience in delivering informatics professional services by supplying all resource categories listed in the table below for the required minimum billed days per resource category. Billed days are defined as days worked and billed to clients, calculated at 7.5 hours or more per day.</p> <table border="1"> <thead> <tr> <th>TBIPS Resource Category</th><th>Minimum Billed Days</th></tr> </thead> <tbody> <tr> <td>P.1 Change Management Consultant</td><td>2250</td></tr> <tr> <td>P.5 Project Executive</td><td>2500</td></tr> <tr> <td>P.9 Project Manager</td><td>3500</td></tr> <tr> <td>P.7 Project Coordinator</td><td>2000</td></tr> </tbody> </table> <p>To demonstrate such experience, the Bidder must complete and submit Form M2 – Billed Days. The Bidder must demonstrate the following for each resource category:</p> <ul style="list-style-type: none"> 1. The services demonstrated were provided under a maximum of 5 contracts; if more than 5 contracts are provided, only the first 5 will be considered; and 2. Each of the identified contracts must have been active within the last 10 years of the issuance date of the RFP; the demonstrated billed days experience must fall within the 10 years of the issuance date of the RFP. 	TBIPS Resource Category	Minimum Billed Days	P.1 Change Management Consultant	2250	P.5 Project Executive	2500	P.9 Project Manager	3500	P.7 Project Coordinator	2000
TBIPS Resource Category	Minimum Billed Days										
P.1 Change Management Consultant	2250										
P.5 Project Executive	2500										
P.9 Project Manager	3500										
P.7 Project Coordinator	2000										
WS1M-3^{PB}	<p>Client Manager: The Bidder must designate a Client Manager as a single point of contact for IRCC. This Client Manager will be responsible for the resource and contract management associated with the resulting contract. A copy of the Client Manager’s résumé must be provided with the bid.</p>										
WS1M-4	<p>Proposed Resources: The Bidder must propose a total of 3 resources, 1 for each of the following categories.</p> <ul style="list-style-type: none"> 1. P.1 Change Management Consultant, Level 3 2. P.5 Project Executive, Level 3 3. P.9 Project Manager, Level 3 										

	The Bidder must provide in its bid, a résumé for each of the proposed resources. Each proposed resource will be evaluated against the applicable resource mandatory and point-rated evaluation criteria identified in Attachment 4.2: Core Resources Technical Criteria. The same resource must not be proposed for more than one category.
WS1M-5	<p>Human Resources Strategy: The Bidder must describe its proposed Human Resources Strategy, including the approach and/or measures it proposes to undertake to ensure its ability to propose fully qualified resources within 5 working days of receipt of a Task Authorization (TA) Request in accordance with the resulting contract.</p> <p>The Bidder must demonstrate its ability to supply, manage and retain sufficient groups of resources in support of a Single Client or Project within the region of delivery. The Bidder must also demonstrate how it will deal with difficult and unexpected situations.</p> <p>The proposed Strategy must not exceed 2 pages of A4 size paper format, with single line spacing.</p>
WS1M-6^{PB}	<p>Contract Management Plan. The Bidder must provide a plan as to how the resulting contract will be managed.</p> <p>The Bidder must describe its proposed Contract Management Plan specifically addressing measures it proposes to undertake to manage the resulting contract including all of the following elements:</p> <ol style="list-style-type: none"> 1. Identify, select and deploy the appropriate resource in a timely manner; 2. Manage the process of transitioning between contracted resources where required for a resource replacement during the term of the contract; 3. Manage quality assurance practices in providing resources for tasking; and 4. Manage contingency plans and practices to ensure resource availability and resource replacement. <p>The proposed Contract Management Plan must not exceed 2 pages of A4 size paper format, with single line spacing.</p>

2.4 Corporate Point-Rated Evaluation Criteria

Bids meeting all mandatory evaluation criteria will be further evaluated and rated against the following point-rated evaluation criteria, using the evaluation factors and weighting indicators specified below. Bidders must meet the minimum pass mark of 115 points across all point-rated evaluation criteria cumulatively (WS1R-1 to WS1R-4). Bidders that do not meet the minimum pass mark will be deemed non-responsive and be given no further consideration. Each Bidder will be evaluated separately against the point-rated evaluation criteria.

RTC#	Rated Technical Criteria (RTC)	Point Scale
WS1R-1	<p>Excess Billed Days: The Bidder should demonstrate its billed days experience in excess of the minimum billed days required in mandatory technical criterion WS1M-2.</p> <p>The Bidder's demonstrated Total Billed Days provided in response to mandatory technical criterion WS1M-2 will be used to evaluate this criterion. The Bidder will be awarded points for billed days in excess of the minimum billed days identified in the table of</p>	<p><u>MAXIMUM 100 POINTS</u></p> <p>The Bidder's demonstrated "Total Billed Days" provided in response to WS1M-2 will be used to evaluate this criterion.</p>

	<p>mandatory technical criterion WS1M-2, as demonstrated in the example evaluation scenario below.</p> <table><tr><th colspan="5">EXAMPLE EVALUATION SCENARIO</th></tr><tr><th colspan="5">BILLED DAYS</th></tr><tr><th rowspan="3">Category</th><th>(A)</th><th>(B)</th><th>(C)</th><th>(D)</th></tr><tr><th rowspan="2">Bidder Total Number of Billed Days under WS1M-2</th><th rowspan="2">Min defined under WS1M-2</th><th>Billable Days in excess of WS1M-2</th><th>Bidder % increase to a max of 100</th></tr><tr><th>(C) = (A) – (B)</th><th>(D) = (C) / (B) *100</th></tr><tr><td>P.1 Change Management Consultant</td><td>3500</td><td>2250</td><td>1250</td><td>55.55</td></tr><tr><td>P.5 Project Executive</td><td>6800</td><td>2500</td><td>4300</td><td>100</td></tr><tr><td>P.9 Project Manager</td><td>5000</td><td>3500</td><td>1500</td><td>42.86</td></tr><tr><td>P.7 Project Coordinator</td><td>4200</td><td>2000</td><td>2200</td><td>100</td></tr><tr><td colspan="4">BIDDER SCORE = SUM OF (D) FOR ALL CATEGORIES / 4 (which will be rounded to two decimal places)</td><td>74.60</td></tr></table> <p>In this example, the Bidder would score 74.60 points out of a possible 100 points.</p>	EXAMPLE EVALUATION SCENARIO					BILLED DAYS					Category	(A)	(B)	(C)	(D)	Bidder Total Number of Billed Days under WS1M-2	Min defined under WS1M-2	Billable Days in excess of WS1M-2	Bidder % increase to a max of 100	(C) = (A) – (B)	(D) = (C) / (B) *100	P.1 Change Management Consultant	3500	2250	1250	55.55	P.5 Project Executive	6800	2500	4300	100	P.9 Project Manager	5000	3500	1500	42.86	P.7 Project Coordinator	4200	2000	2200	100	BIDDER SCORE = SUM OF (D) FOR ALL CATEGORIES / 4 (which will be rounded to two decimal places)				74.60	<p>The Bidder will be awarded points as demonstrated in the example evaluation scenario on the left side.</p>
EXAMPLE EVALUATION SCENARIO																																																
BILLED DAYS																																																
Category	(A)	(B)	(C)	(D)																																												
	Bidder Total Number of Billed Days under WS1M-2	Min defined under WS1M-2	Billable Days in excess of WS1M-2	Bidder % increase to a max of 100																																												
			(C) = (A) – (B)	(D) = (C) / (B) *100																																												
P.1 Change Management Consultant	3500	2250	1250	55.55																																												
P.5 Project Executive	6800	2500	4300	100																																												
P.9 Project Manager	5000	3500	1500	42.86																																												
P.7 Project Coordinator	4200	2000	2200	100																																												
BIDDER SCORE = SUM OF (D) FOR ALL CATEGORIES / 4 (which will be rounded to two decimal places)				74.60																																												
WS1R-2	<p>Client Manager Experience: The Bidder should demonstrate the proposed Client Manager’s experience managing resources. In order to demonstrate this, the Bidder should provide the following:</p> <ol style="list-style-type: none">1. The number of years of experience that the proposed resource has served as a Client Manager.2. The combined total number of resources that the proposed Client Manager resource has managed under any contract(s) within the last 5 years from the issuance date of the RFP, including the following for each contract:<ol style="list-style-type: none">a. the organization name;b. the start and end dates for the contract(s); and,c. the contract number(s).	<p><u>MAXIMUM 15 POINTS</u> <u>Years of Experience:</u> <u>MAXIMUM 5 POINTS</u></p> <p>1 point will be awarded for every 2 years of experience that the proposed Client Manager resource has served as a Client Manager on contracts (up to a maximum of 5 points). <u>Combined Total # of resources managed:</u> <u>MAXIMUM 10 POINTS</u></p> <p>Less than 2 resources = 0 points 3 to 6 resources = 2 points 7 to 10 resources = 4 points 11 to 14 resources = 6 points 15 to 18 resources = 8 points 18 resources or more = 10 points</p>																																														
WS1R-3	<p>Resource Placement: For one of the Reference Contracts in WS1M-2, the Bidder should demonstrate, using Form R3 – Resource Placement, that it directly placed resources who performed work for a period of 4 months or more.</p>	<p><u>MAXIMUM 30 POINTS</u></p> <p>Less than 4 resources = 0 points</p>																																														

	<p>If the Reference Contract is a Task Authorization contract, one or multiple Task Authorizations is acceptable. The number of resources who have continuously worked under one or multiple Task Authorization(s) for a period of 4 months or more will be summed to determine the resource total.</p>	<p>5 to 6 resources = 5 points 7 to 8 resources = 10 points 9 to 10 resources = 15 points 11 to 12 resources = 20 points 13 to 14 resources = 25 points 15 resources or more = 30 points</p>
WS1R-4	<p>Diversity Inclusion: The Bidder should demonstrate the following corporate activities that have been implemented to promote anti-racism and diversity within their organisation:</p> <ol style="list-style-type: none"> The Bidder has internally published policies or commitments on anti-racism and inclusiveness; The Bidder has publically available organisational commitments to a diverse workforce; The Bidder's employees are mandated to take mandatory training on anti-racism; The Bidder's employees are mandated to take unconscious bias training; and, The Bidder has developed internal staffing and/or recruitment strategy(ies) to increase representation of underrepresented groups in their workforce. <p>To demonstrate the activities, the Bidder must complete and submit Form R4 – Diversity Inclusion detailing all activities described in a. to e. The following must be provided to obtain points for providing supporting documentation.</p> <p>For activities described in a. and b. (policies and commitments):</p> <ol style="list-style-type: none"> Copies of policy or commitment documents including effective dates. <p>For activities described in c. and d.(training):</p> <ol style="list-style-type: none"> The name of the course and the service provider; if developed internally, a copy of the course outline. <p>For activities described in e.(staffing):</p> <ol style="list-style-type: none"> Copies of job posting, or other staffing and recruitment documents demonstrating compliance with the rated criteria. 	<p><u>MAXIMUM 20 POINTS</u></p> <p>Maximum 4 points will be awarded for each activity (a. to e.) 0 points = the Bidder does not address. 2 points = The Bidder has provided information on the existence of the activity but does not provide sufficient detail or supporting documents. 4 points =The Bidder has fully described the activity and provided supporting documents as evidence.</p>

3.0 WORKSTREAM 2: ARCHITECTURE AND BUSINESS DELIVERY SERVICES

3.1 Evaluation Summary

No.	Mandatory Criteria	
WS2M-1 ^{PB}	Corporate Capacity	
WS2M-2 ^{PB}	Billed Days	
WS2M-3	Certifications	
WS2M-4 ^{PB}	Client Manager	
WS2M-5	Proposed Resources	
WS2M-6	Human Resources Strategy	
WS2M-7 ^{PB}	Contract Management Plan	
No.	Point-Rated Technical Criteria	Maximum Points
WS2R-1	Excess Billed Days	100
WS2R-2	Client Manager Experience	15
WS2R-3	Resource Placement	30
WS2R-4	Diversity Inclusion	20
Overall Maximum Points		165
Pass Mark		115

3.2 Resource Categories (Core)

TBIPS ID	CATEGORY OF PERSONNEL	LEVEL OF EXPERTISE	NO. OF RESOURCES TO BE PROPOSED AT BID CLOSING
Core Resources			
B.1	Business Analyst - Advisory	3	1
B.2	Business Architect	3	1
B.3	Business Consultant	3	1
B.7	Business Transformation Architect - Advisory	3	1

Only the Core Resources identified above are required to be submitted at bid closing and will be evaluated against the resource mandatory and point-rated evaluation criteria identified in Attachment 4.2: Core Resources Technical Criteria. The Additional Resources identified in the Statement of Work at Annex A of this solicitation are not required to be proposed at bid closing. These resources may be requested and evaluated after contract award via a Task Authorization process outlined in the Contract. The Core Resources proposed within the Bidder's bid must meet the security requirements specified in Part 6 of the RFP at the bid closing date, while the Additional Resources must meet the security requirements specified in Contract Clauses 7.6 prior to Task Authorization issuance.

3.3 Corporate Mandatory Evaluation Criteria

MTC#	Mandatory Technical Criteria
WS2M-1 ^{PB}	<p>Corporate Capacity: Using only 1 Reference Contract provided, the Bidder must demonstrate its experience providing services related to Architecture and Business Delivery Services for a Public Sector client. The identified Reference Contract must:</p> <ul style="list-style-type: none"> a) have been with a Single Client; b) have a minimum value of \$15,000,000 (CAD) including applicable taxes and

	<p>including amendments;</p> <p>c) have an initial minimum contract period of 2 years;</p> <p>d) have been completed in the last 5 years from the issuance date of the RFP or has been ongoing for a minimum of 6 months from the issuance date of the RFP;</p> <p>e) have included the provision of the services of at least 2 of the following resource categories listed below (i. to vi.) in accordance with Section 7. of the Statement of Work of this bid solicitation:</p> <p>i. B.1 Business Analyst</p> <p>ii. B.2 Business Architect</p> <p>iii. B.3 Business Consultant</p> <p>iv. B.7 Business Transformation Architect</p> <p>v. I.10 Technical Architect</p> <p>vi. P.2 Enterprise Architect</p> <p>Regarding the Reference Contract, the Bidder must complete and submit Form M1 – Corporate Capacity.</p> <p>For the purpose of this criterion, the term ‘task’ includes the tasks identified in the Statement of Work at Annex A of this bid solicitation for the identified resource category. The Bidder must demonstrate at least 50% of the tasks for that resource category in Section 8 of the Statement of Work at Annex A of this bid solicitation. For example, if the SOW for a resource category identifies 15 tasks, the Bidder must use any 7 of the resource category’s SOW tasks to meet this requirement (50% of 15 = 7).</p> <p>The Bidder must have been contracted as the prime contractor for the Reference Contract provided in response to this criterion.</p>												
WS2M-2^{PB}	<p>Billed Days: The Bidder must demonstrate contract experience in delivering informatics professional services supplying all resource categories listed in the table below for the required minimum billed days per resource category. Billed days are defined as days worked and billed to clients, calculated at 7.5 hours or more per day.</p> <table><tr><th>TBIPS Resource Category</th><th>Minimum Billed Days</th></tr><tr><td>B.1 Business Analyst</td><td>2000</td></tr><tr><td>B.2 Business Architect</td><td>2500</td></tr><tr><td>B.3 Business Consultant</td><td>2000</td></tr><tr><td>B.7 Business Transformation Architect</td><td>1500</td></tr><tr><td>P.2 Enterprise Architect</td><td>2500</td></tr></table> <p>To demonstrate such experience, the Bidder must complete and submit Form M2 – Billed Days.</p> <p>The Bidder must demonstrate the following for each resource category:</p> <ol style="list-style-type: none">1. The services demonstrated were provided under a maximum of 5 contracts; if more than 5 contracts are provided, only the first 5 will be considered; and2. Each of the identified contracts must have been active within the last 10 years from the issuance date of this RFP; the demonstrated billed days experience must fall within the 10 years from the issuance date of this RFP.	TBIPS Resource Category	Minimum Billed Days	B.1 Business Analyst	2000	B.2 Business Architect	2500	B.3 Business Consultant	2000	B.7 Business Transformation Architect	1500	P.2 Enterprise Architect	2500
TBIPS Resource Category	Minimum Billed Days												
B.1 Business Analyst	2000												
B.2 Business Architect	2500												
B.3 Business Consultant	2000												
B.7 Business Transformation Architect	1500												
P.2 Enterprise Architect	2500												

WS2M-3	<p>Certifications: The Bidder must hold a minimum partnership level with at least 1 of the following Robotic Process Automation (RPA) providers:</p> <ul style="list-style-type: none">a) Invokeb) Blue Prism – Gold level <p>To demonstrate the above, a copy of the valid certification must be provided with the bid. If the Bidder bids as a Joint Venture, the partnership must have been obtained by the Bidder as the representative of the Joint Venture in response to this criterion.</p>
WS2M-4^{PB}	<p>Client Manager: The Bidder must designate a Client Manager as a single point of contact for IRCC. This Client Manager will be responsible for the resource and contract management associated with the resulting contract. A copy of the Client Manager's résumé must be provided with the bid.</p>
WS2M-5	<p>Proposed Resources. The Bidder must propose a total of 4 resources, 1 for each of the following categories:</p> <ul style="list-style-type: none">1. B.1 Business Analyst – Advisory2. B.2 Business Architect3. B.3 Business Consultant – Advisory4. B.7 Business Transformation Architect - Advisory <p>The Bidder must provide in its bid a résumé for each of the proposed resources. Each proposed resource will be evaluated against the applicable resource mandatory and point-rated evaluation criteria identified in Attachment 4.2: Core Resources Technical Criteria. The same resource must not be proposed for more than 1 category.</p>
WS2M-6	<p>Human Resources Strategy: The Bidder must describe its proposed Human Resources Strategy, including the approach and/or measures it proposes to undertake to ensure its ability to propose fully qualified resources within 5 working days of receipt of a Task Authorization (TA) Request in accordance with the resulting contract.</p> <p>The Bidder must demonstrate its ability to supply, manage and retain sufficient groups of resources in support of a Single Client or Project within the region of delivery. The Bidder must also demonstrate how it will deal with difficult and unexpected situations. The proposed Strategy must not exceed 2 pages of A4 size paper format, with single line spacing.</p>
WS2M-7^{PB}	<p>Contract Management Plan: The Bidder must provide a plan as to how the resulting contract will be managed.</p> <p>The Bidder must describe its proposed Contract Management Plan specifically addressing measures it proposes to undertake to manage the resulting contract including all of the following elements:</p> <ul style="list-style-type: none">1. Identify, select and deploy the appropriate resource in a timely manner;2. Manage the process of transitioning between contracted resources where required for a resource replacement during the term of the contract;3. Manage quality assurance practices in providing resources for tasking; and4. Manage contingency plans and practices to ensure resource availability and resource replacement. <p>The proposed Contract Management Plan must not exceed 2 pages of A4 size paper format, with single line spacing.</p>

3.4 Corporate Point-Rated Evaluation Criteria

Bids meeting all mandatory evaluation criteria will be further evaluated and point rated against the following point-rated evaluation criteria, using the evaluation factors and weighting indicators specified below.

Bidders must meet the minimum pass mark of 115 points across all point-rated evaluation criteria cumulatively (WS2R-1 to WS2R-4). Bidders that do not meet the minimum pass mark will be deemed non-responsive and be given no further consideration. Each Bidder will be evaluated separately against the point-rated evaluation criteria.

RTC#	Rated Technical Criteria	Point Scale																																																			
WS2R-1	<p>Excess Billed Days: The Bidder should demonstrate its billed days experience in excess of the minimum billed days required in mandatory technical criterion WS2M-2.</p> <p>The Bidder's demonstrated Total Billed Days provided in response to mandatory technical criterion WS2M-2 will be used to evaluate this criterion.</p> <p>The Bidder will be awarded points for billed days in excess of the minimum billed days identified in the table of mandatory technical criterion WS2M-2, as demonstrated in the example evaluation scenario below.</p> <table><tr><th colspan="5">EXAMPLE EVALUATION SCENARIO</th></tr><tr><th colspan="5">BILLED DAYS</th></tr><tr><th rowspan="3">Category</th><th>(A)</th><th>(B)</th><th>(C)</th><th>(D)</th></tr><tr><th rowspan="2">Bidder Total Number of Billed Days under WS2M-2</th><th rowspan="2">Min defined under WS2M-2</th><th>Billable Days in excess of WS2M-2</th><th>Bidder % increase to a max of 100</th></tr><tr><th>(C) = (A) – (B)</th><th>(D) = (C) / (B) *100</th></tr><tr><td>B.1 Business Analyst</td><td>3750</td><td>2000</td><td>1750</td><td>87.50</td></tr><tr><td>B.2 Business Architect</td><td>5500</td><td>2500</td><td>3000</td><td>100</td></tr><tr><td>B.3 Business Consultant</td><td>3800</td><td>2000</td><td>1800</td><td>90.00</td></tr><tr><td>B.7 Business Transformation Architect</td><td>3600</td><td>1500</td><td>2100</td><td>100</td></tr><tr><td>P.2 Enterprise Architect</td><td>3100</td><td>2500</td><td>600</td><td>24.00</td></tr><tr><td colspan="4">BIDDER SCORE = SUM OF (D) FOR ALL CATEGORIES / 5 (which will be rounded to two decimal places)</td><td>80.30</td></tr></table> <p>In this example, the Bidder would score 80.30 points out of a possible 100 points</p>	EXAMPLE EVALUATION SCENARIO					BILLED DAYS					Category	(A)	(B)	(C)	(D)	Bidder Total Number of Billed Days under WS2M-2	Min defined under WS2M-2	Billable Days in excess of WS2M-2	Bidder % increase to a max of 100	(C) = (A) – (B)	(D) = (C) / (B) *100	B.1 Business Analyst	3750	2000	1750	87.50	B.2 Business Architect	5500	2500	3000	100	B.3 Business Consultant	3800	2000	1800	90.00	B.7 Business Transformation Architect	3600	1500	2100	100	P.2 Enterprise Architect	3100	2500	600	24.00	BIDDER SCORE = SUM OF (D) FOR ALL CATEGORIES / 5 (which will be rounded to two decimal places)				80.30	<p>MAXIMUM 100 POINTS</p> <p>The Bidder's demonstrated "Total Billed Days" provided in response to WS2M-2 will be used to evaluate this criterion. The Bidder will be awarded points as demonstrated in the example evaluation scenario on the left side.</p>
EXAMPLE EVALUATION SCENARIO																																																					
BILLED DAYS																																																					
Category	(A)	(B)	(C)	(D)																																																	
	Bidder Total Number of Billed Days under WS2M-2	Min defined under WS2M-2	Billable Days in excess of WS2M-2	Bidder % increase to a max of 100																																																	
			(C) = (A) – (B)	(D) = (C) / (B) *100																																																	
B.1 Business Analyst	3750	2000	1750	87.50																																																	
B.2 Business Architect	5500	2500	3000	100																																																	
B.3 Business Consultant	3800	2000	1800	90.00																																																	
B.7 Business Transformation Architect	3600	1500	2100	100																																																	
P.2 Enterprise Architect	3100	2500	600	24.00																																																	
BIDDER SCORE = SUM OF (D) FOR ALL CATEGORIES / 5 (which will be rounded to two decimal places)				80.30																																																	

RTC#	Rated Technical Criteria	Point Scale
WS2R-2	<p>Client Manager Experience: The Bidder should demonstrate the proposed Client Manager's experience managing resources. In order to demonstrate this, the Bidder should provide the following:</p> <ol style="list-style-type: none"> 1. The number of years of experience that the proposed Client Manager resource has served as a Client Manager. 2. The combined total number of resources that the proposed resource has managed under any contract(s) within the last 5 years from the issuance date of the RFP, including the following for each contract: <ol style="list-style-type: none"> a. the organization name; b. the start and end dates for the contract(s); and, c. the contract number(s). 	<p><u>MAXIMUM 15 POINTS</u></p> <p><u>Years of Experience:</u> <u>MAXIMUM 5 POINTS</u></p> <p>1 point will be awarded for every 2 years of experience that the proposed Client Manager resource has served as a Client Manager on contracts (up to a maximum of 5 points).</p> <p><u>MAXIMUM 10 POINTS</u></p> <p><u>Combined Total # of resources managed:</u></p> <p>Less than 2 resources = 0 points 3 to 6 resources = 2 points 7 to 10 resources = 4 points 11 to 14 resources = 6 points 15 to 18 resources = 8 points 18 resources and more = 10 points</p>
WS2R-3	<p>Resource Placement: For one of the Reference Contracts in WS2M-2, the Bidder should demonstrate, using Form R3 – Resource Placement that it directly placed resources who performed work for a period of 4 months or more.</p> <p>If the Reference Contract is a Task Authorization contract, one or multiple Task Authorizations is acceptable. The number of resources who have continuously worked under one or multiple Task Authorization(s) for a period of 4 months or more will be summed to determine the resource total.</p>	<p><u>MAXIMUM 30 POINTS</u></p> <p>Less than 4 resources = 0 points 5 to 6 resources = 5 points 7 to 8 resources = 10 points 9 to 10 resources = 15 points 11 to 12 resources = 20 points</p>

RTC#	Rated Technical Criteria	Point Scale
		13 to 14 resources = 25 points 15 resources or more = 30 points
WS2R-4	<p>Diversity Inclusion: The Bidder should demonstrate the following corporate activities that have been implemented to promote anti-racism and diversity within their organisation:</p> <ul style="list-style-type: none"> a. The Bidder has internally published policies or commitments on anti-racism and inclusiveness; b. The Bidder has publically available organisational commitments to a diverse workforce; c. The Bidder's employees are mandated to take mandatory training on anti-racism; d. The Bidder's employees are mandated to take unconscious bias training; and, e. The Bidder has developed internal staffing and/or recruitment strategy(ies) to increase representation of underrepresented groups in their workforce. <p>To demonstrate the activities, the Bidder must complete and submit Form R4 – Diversity Inclusion detailing all activities described in a. to e.</p> <p>The following must be provided to obtain points for providing supporting documentation.</p> <p>For activities described in a. and b. (policies and commitments):</p> <ul style="list-style-type: none"> i. Copies of policy or commitment documents including effective dates. <p>For activities described in c. and d.(training):</p> <ul style="list-style-type: none"> ii. The name of the course and the service provider; if developed internally, a copy of the course outline. <p>For activities described in e.(staffing):</p> <ul style="list-style-type: none"> iii. Copies of job posting, or other staffing and recruitment documents demonstrating compliance with the rated criteria. 	<p><u>MAXIMUM 20 POINTS</u></p> <p>Maximum 4 points will be awarded for each activity (a. to e.)</p> <p>0 points = the Bidder does not address. 2 points = The Bidder has provided information on the existence of the activity but does not provide sufficient detail or supporting documents. 4 points =The Bidder has fully described the activity and provided supporting documents as evidence.</p>

ATTACHMENT 4.2 CORE RESOURCES TECHNICAL CRITERIA

1. General Instructions

To facilitate bid preparation and evaluation, Bidders should prepare and submit their bid using only specific project and related information which demonstrates the required criteria. Bidders should include the criteria number for each reference item in each résumé to ease verifying the information. Bidders should not include unrelated project information from the proposed resources résumé when responding to each criteria.

2. Mandatory and Point-Rated Criteria

This section outlines the key resources mandatory and point-rated criteria to be used in evaluation of the Bidder's proposed core resources.

2.1 Workstream 1 – Strategic Transformation Project Management Office Services

TBIPS ID	RESOURCE CATEGORY	LEVEL OF EXPERTISE	NUMBER OF RESOURCES TO BE PROPOSED AT BID CLOSING
Core Resources			
P.1	Change Management Consultant	3	1
P.5	Project Executive	3	1
P.9	Project Manager	3	1

2.1.1 Change Management Consultant – Level 3

Change Management Consultant – Level 3	
MC#	Mandatory Technical Criteria
M1	<p>The Bidder must demonstrate that the proposed resource has a minimum of 10 years of experience within the past 15 years of the RFP issuance date, performing the role of a Change Management Consultant – Level 3 in accordance with the TBIPS Supply Arrangement. To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p> <p>Referenced Projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category.</p>
M2	<p>The Bidder must demonstrate that the proposed resource has experience working as a Change Management Consultant on at least 2 IM/IT Projects for a Public Sector client within the past 3 years of the RFP issuance date.</p> <p>To demonstrate such experience, the Bidder must provide 2 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>
M3	<p>The Bidder must demonstrate that the proposed resource holds at minimum 1 of the following Change Management Certifications:</p> <ul style="list-style-type: none">a) Proscib) Certified Change Management Professional (CCMP) <p>To demonstrate above, a valid copy of the certification must be provided with the bid.</p>

Change Management Consultant – Level 3	
MC#	Mandatory Technical Criteria
M4	<p>The Bidder must demonstrate that the proposed resource has combined experience within the past 5 years of the RFP issuance date developing all of the following documentation for at least 2 Public Sector clients:</p> <ul style="list-style-type: none"> a) Change communications plans; and b) Impact assessments. <p>To demonstrate such experience, the Bidder must provide 2 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>
M5	<p>The Bidder must demonstrate that the proposed resource has a minimum of 10 years of combined experience within the last 15 years of the RFP issuance date advising Senior Executive Management on the following:</p> <ul style="list-style-type: none"> a) Issues affecting an organization's ability to achieve change management directives; b) Communications; and c) Stakeholder engagement objectives. <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>

Change Management Consultant – Level 3		
	Rated Technical Criteria	Point Scale
R1	<p>The Bidder should demonstrate that the proposed resource has experience within the past 10 years of the RFP issuance date leading the analysis and development of business critical success factors.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>1 to less than 3 years = 2 points 3 to less than 5 years = 4 points 5 to less than 7 years = 6 points 7 to less than 9 years = 8 points 9 years and more = 10 points</p> <p>Maximum points available = 10 points</p>
R2	<p>The Bidder should demonstrate that the proposed resource has a minimum of at least 1 year of combined experience within the past 10 years of the RFP issuance date with the following:</p> <ul style="list-style-type: none"> a) preparing and delivering analysis; b) development of architecture requirements design; c) process development, and d) process mapping. <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>1 to less than 3 years = 2 points 3 to less than 5 years = 4 points 5 to less than 7 years = 6 points 7 to less than 9 years = 8 points 9 years and more = 10 points</p> <p>Maximum points available = 10 points</p>
R3	<p>The Bidder should demonstrate that the proposed resource has a minimum of at least 1 year of experience within the past 10 years of the RFP issuance date defining business strategies and processes in support of Business Transformation and Change Management Projects.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>1 to less than 3 years = 2 points 3 to less than 5 years = 4 points 5 to less than 7 years = 6 points 7 to less than 9 years = 8 points 9 years and more = 10 points</p> <p>Maximum points available = 10 points</p>

Change Management Consultant – Level 3		
	Rated Technical Criteria	Point Scale
R4	<p>The Bidder should demonstrate that the proposed resource has a Masters degree from an accredited Canadian University, or equivalent, in business administration or public administration. For equivalency please refer to: http://www.cicic.ca/2/home.canada</p> <p>To demonstrate above, a copy of the degree must be provided with the bid.</p>	<p>No Masters Degree = 0 points Master's Degree = 10 points</p> <p>Maximum points available = 10 points</p>
<p>Total available points = 40 points Min pass mark = 28 points</p>		

2.1.2 Project Executive – Level 3

Project Executive – Level 3	
MC#	Mandatory Technical Criteria
M1	<p>The Bidder must demonstrate that the proposed resource has a minimum of 10 years of experience within the past 15 years of the RFP issuance date as a Project Executive – Level 3 in accordance with the TBIPS Supply Arrangement.</p> <p>To demonstrate such experience, the Bidder must provide one or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p> <p>Referenced Projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category.</p>
M2	<p>The Bidder must demonstrate that the proposed resource has experience within the past 15 years from the RFP issuance date planning and executing a Large Scale IM/IT modernization Program (>\$300M) for a Project of at least 2 years in duration.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined below:</p> <p>A Reference Project is defined as a Project of the Bidders proposed Resource to deliver the identified services and deliverables to a client organization. A Reference Project may encompass sub-Projects and must include the following supporting information:</p> <ol style="list-style-type: none"> 1. Name of the Project(s); 2. Organization for which the work was performed; 3. Duration of work (start and end dates in MM/YY format); 4. Program value; 5. Tasks performed; and 6. Client reference (name, title, phone number or email address). <p>The client reference must have been in a reporting or management role or the client's Project Authority or an authorized representative who can validate the Bidders claim. A colleague or a subordinate will not be accepted.</p> <p>Bidders are also advised that the month(s) of experience listed for a project whose timeframe overlaps that of another referenced project will only be counted once. For example, Project 1 timeframe is July 2001 to December 2001; Project 2 timeframe is October 2001 to January 2002; the total months of experience for these two project references is 7 months. 1 Reference Project may be used to demonstrate more than one criteria.</p>

Project Executive – Level 3	
MC#	Mandatory Technical Criteria
	For the referenced Large Scale IM/IT modernization Program, the minimum duration that the resource has worked on the Program must be no less than 2 years and must have a value of more than \$300M.
M3	<p>The Bidder must demonstrate that the proposed resource has a minimum of 2 years of experience within the past 10 years of the RFP issuance date as a member of a Senior Executive Management Committee (i.e. internal Board of Directors or equivalent) or a direct report to a Board of Directors for a Public Sector client.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>
M4	<p>The Bidder must demonstrate that the proposed resource has a minimum of 2 years of experience within the past 10 years of the RFP issuance date leading the development of an IM/IT Strategy and/or Roadmap that has led to the transformation of a Large Project for a Public Sector client.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>

Project Executive – Level 3		
	Rated Technical Criteria	Point Scale
R1	<p>The Bidder should demonstrate that the proposed resource has experience in addition to the experience identified in M1.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 10 years = 0 points 10 to less than 11 years = 5 points 11 to less than 12 years = 10 points 12 to less than 13 years = 15 points 13 to less than 14 years = 20 points 14 years and more = 25 points</p> <p>Maximum points available = 25 points</p>
R2	<p>The Bidder should demonstrate that the proposed resource has a minimum of 5 years of experience within the past 15 years of the RFP issuance date leading projects for organizational performance and/or restructuring.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 5 years = 0 points 5 to less than 6 years = 5 points 6 to less than 7 years = 10 points 7 to less than 8 years = 15 points 8 to less than 9 years = 20 points 9 years and more = 25 points</p> <p>Maximum points available = 25 points</p>
R3	<p>The Bidder should demonstrate that the proposed resource has a minimum of 5 years of experience within the past 15 years of the RFP issuance date providing Project advisory services to Senior Executive Management.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 5 years = 0 points 5 to less than 6 years = 5 points 6 to less than 7 years = 10 points 7 to less than 8 years = 15 points 8 to less than 9 years = 20 points 9 years and more = 25 points</p> <p>Maximum points available = 25 points</p>
R4	<p>The Bidder should demonstrate that the proposed resource has combined experience supporting Senior Executive Management and Stakeholders by developing the following documents:</p>	<p>Less than 1 year = 0 points 1 to less than 2 years = 5 points 2 to less than 3 years = 10 points 3 to less than 4 years = 15 points 4 to less than 5 years = 20 points 5 years and more = 25 points</p>

Project Executive – Level 3		
Rated Technical Criteria		Point Scale
	<p>a) Project health summaries (budget, scope, risks); and</p> <p>b) Preparing plans, charts and presentations to communicate project statuses.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Maximum points available = 25 points</p>
R5	<p>The Bidder should provide a Senior Executive Management level reference that can confirm the proposed resource's experience working as a Senior Project Executive:</p> <p>Reference information must include the following supporting information:</p> <ol style="list-style-type: none"> 1. Name of the Project(s); 2. Organization for which the work was performed; 3. Duration of work (start and end dates in MM/YY format); 4. Tasks performed; and 5. Client reference (name, title, phone number or email address). <p>The client reference must have been in a reporting or management role or the client's Project Authority or an authorized representative who can validate the Bidders claim. A colleague or a subordinate will not be accepted.</p>	<p>No reference provided = 0 points Reference provided = 10 points</p> <p>Maximum points available = 10 points</p>
<p>Total available points = 110 points Min pass mark = 75 points</p>		

2.1.3 Project Manager – Level 3

Project Manager – Level 3	
MC#	Mandatory Technical Criteria
M1	<p>The Bidder must demonstrate that the proposed resource has a minimum of 10 years of experience within the past 15 years of the RFP issuance date as a Project Manager – Level 3 in accordance with the TBIPS Supply Arrangement.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p> <p>Referenced Projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category.</p>
M2	<p>The Bidder must demonstrate that the proposed resource holds a valid PMP (Project Management Professional) Certification from the Professional Management Institute (PMI).</p> <p>To demonstrate above, a valid copy of the certification must be provided with the bid.</p>
M3	<p>The Bidder must demonstrate that the proposed resource has a minimum of 10 years of combined experience within the past 15 years of the RFP issuance date working on at least 3 Projects, each spanning at least one 1 year in length completing all of the following activities:</p>

Project Manager – Level 3	
MC#	Mandatory Technical Criteria
	<p>a) Developing project artefacts such as project charters, project management plans, and project schedules;</p> <p>b) Developing project dashboards;</p> <p>c) Developing project charters;</p> <p>d) Developing project management plans;</p> <p>e) Developing a risk plan, risk register and risk mitigation strategies; and</p> <p>f) Conducting project briefings to departmental management.</p> <p>To demonstrate such experience, the Bidder must provide 3 or more Reference Project(s) as defined below:</p> <p>A Reference Project is defined as a Project of the Bidder's proposed Resource to deliver the identified services and deliverables to a client organization. A Reference Project may encompass sub-Projects and must include the following supporting information:</p> <ol style="list-style-type: none"> 1. Name of the Project(s); 2. Organization for which the work was performed; 3. Duration of work (start and end dates in MM/YY format); 4. Tasks performed; and 5. Client reference (name, title, phone number or email address). <p>The client reference must have been in a reporting or management role or the client's Project Authority or an authorized representative who can validate the Bidder's claim. A colleague or a subordinate will not be accepted.</p> <p>Bidders are also advised that the month(s) of experience listed for a project whose timeframe overlaps that of another referenced project will only be counted once. For example, Project 1 timeframe is July 2001 to December 2001; Project 2 timeframe is October 2001 to January 2002; the total months of experience for these two project references is 7 months. One Reference Project may be used to demonstrate more than one criteria.</p> <p>The minimum duration for at least 3 of the Referenced Projects that the resource has worked on must be no less than 1 year. Referenced Projects in excess of the minimum 3 required must be no less than 4 months.</p>
M4	<p>The Bidder must demonstrate that the proposed resource has experience working on at least 2 Projects, each spanning at least 6 months in length within the past 15 years of the RFP issuance date working as a Senior Project Manager, leading a minimum of 3 Junior Project Managers.</p> <p>The Reference Projects must relate to IM/IT, business architecture or project management. 1 of the Referenced Projects must be valued at \$5M or more.</p> <p>To demonstrate such experience, the Bidder must provide 2 or more Reference Project(s) as defined below.</p> <p>A Reference Project is defined as a Project of the Bidder's proposed Resource to deliver the identified services and deliverables to a client organization. A Reference Project may encompass sub-Projects and must include the following supporting information:</p> <ol style="list-style-type: none"> 1. Name of the Project(s); 2. Organization for which the work was performed; 3. Duration of work (start and end dates in MM/YY format); 4. Tasks performed; and

Project Manager – Level 3	
MC#	Mandatory Technical Criteria
	<p>5. Client reference (name, title, phone number or email address).</p> <p>The client reference must have been in a reporting or management role or the client's Project Authority or an authorized representative who can validate the Bidder's claim. A colleague or a subordinate will not be accepted.</p> <p>Bidders are also advised that the month(s) of experience listed for a project whose timeframe overlaps that of another referenced project will only be counted once. For example, Project 1 timeframe is July 2001 to December 2001; Project 2 timeframe is October 2001 to January 2002; the total months of experience for these two project references is 7 months. One Reference Project may be used to demonstrate more than one criteria.</p> <p>The minimum duration for at least 2 of the Referenced Projects that the resource has worked on must be no less than 6 months. 1 of the 2 Referenced Projects must be valued at no less than \$5M. Referenced Projects in excess of the minimum 2 required must be no less than 4 months.</p>
M5	<p>The Bidder must demonstrate that the proposed resource has a minimum of 5 years of experience within the last 15 years of the RFP issuance date working on at least 3 Projects, each spanning at least 1 year in length, collaborating with a variety of Stakeholders (both internal and external to the organization).</p> <p>To demonstrate such experience, the Bidder must provide 3 or more Reference Project(s) as defined below.</p> <p>A Reference Project is defined as a Project of the Bidder's proposed Resource to deliver the identified services and deliverables to a client organization. A Reference Project may encompass sub-Projects and must include the following supporting information:</p> <ol style="list-style-type: none"> 1. Name of the Project(s); 2. Organization for which the work was performed; 3. Duration of work (start and end dates in MM/YY format); 4. Tasks performed; and 5. Client reference (name, title, phone number or email address). <p>The client reference must have been in a reporting or management role or the client's Project Authority or an authorized representative who can validate the Bidder's claim. A colleague or a subordinate will not be accepted.</p> <p>Bidders are also advised that the month(s) of experience listed for a project whose timeframe overlaps that of another referenced project will only be counted once. For example, Project 1 timeframe is July 2001 to December 2001; Project 2 timeframe is October 2001 to January 2002; the total months of experience for these two project references is 7 months. One Reference Project may be used to demonstrate more than one criteria.</p> <p>The minimum duration for at least 3 of the Referenced Projects that the resource has worked on must be no less than 1 year. Referenced Projects in excess of the minimum 3 required must be no less than 4 months.</p>
M6	<p>The Bidder must demonstrate that the proposed resource has a minimum of 5 years of experience within the past 15 years from the RFP issuance date coaching and/or mentoring Junior Project Managers and/or Project Management Office (PMO) staff for a Public Sector client.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms</p>

Project Manager – Level 3	
MC#	Mandatory Technical Criteria
M7	<p>The Bidder must demonstrate that the proposed resource has a minimum of 5 years of combined experience within the past 10 years of the RFP issuance date leading the development of a PMO including the development of all of the following artefacts:</p> <ol style="list-style-type: none"> 1. Developing PMO charter and implementation plan; 2. Defining PMO roles and responsibilities, service offerings, project support structures and internal processes and procedures; 3. Development of training support, user guides, procedure documentation for PMO processes. <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>

Project Manager – Level 3		
	Rated Technical Criteria	Point Scale
R1	<p>The Bidder should demonstrate that the proposed resource has additional years of experience, in excess of Mandatory Criteria M6 for this resource category.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 5 years = 0 points 5 to less than 6 years = 10 points 6 to less than 7 years = 15 points 7 years and more = 20 points</p> <p>Maximum points available = 20 points</p>
R2	<p>The Bidder should demonstrate that the proposed resource has additional years of experience, in excess of Mandatory Criteria M7 for this resource category.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 5 years = 0 points 5 to less than 6 years = 10 points 6 to less than 7 years = 15 points 7 years and more = 20 points</p> <p>Maximum points available = 20 points</p>
R3	<p>The Bidder should demonstrate that the proposed resource has a minimum of 5 years of experience within the past 15 years of the RFP issuance date collaborating on Projects with internal and external Stakeholders.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 5 years = 0 points 5 to less than 7 years = 10 points 7 to less than 9 years = 15 points 9 years and more = 20 points</p> <p>Maximum points available = 20 points</p>
R4	<p>The Bidder should demonstrate that the proposed resource has a minimum of 5 years of combined experience within the past 15 years of the RFP issuance date completing all of the following activities to assist in analyzing and displaying problems.</p> <ol style="list-style-type: none"> a) Preparing plans; b) Preparing charts; c) Preparing tables; and d) Preparing Diagrams 	<p>5 to less than 7 years = 10 points 7 to less than 9 years = 15 points 9 years and more = 20 points</p> <p>Maximum points available = 20 points</p>

Project Manager – Level 3		
Rated Technical Criteria		Point Scale
	To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.	
Total available points = 80 points Min pass mark = 55 points		

2.2 Workstream 2 – Architecture and Business Delivery Services

TBIPS ID	RESOURCE CATEGORY	LEVEL OF EXPERTISE	NUMBER OF RESOURCES TO BE PROPOSED AT BID CLOSING
Core Resources			
B.1	Business Analyst – Advisory	3	1
B.2	Business Architect	3	1
B.3	Business Consultant – Advisory	3	1
B.7	Business Transformation Architect - Advisory	3	1

2.2.1 Business Analyst – Advisory – Level 3

Business Analyst – Advisory, Level 3	
MC#	Mandatory Technical Criteria
M1	<p>The Bidder must demonstrate that the proposed resource has a minimum of 10 years of experience within the past 15 years from the RFP issuance date, performing the role of a Business Analyst – Level 3 in accordance with the TBIPS Supply Arrangement.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p> <p>Referenced Projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category.</p>
M2	<p>The Bidder must demonstrate that the proposed resource has a minimum of 10 years of experience within the past 15 years of the RFP issuance date working as a Business Analyst on IM/IT Projects for a Public Sector client(s).</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>
M3	<p>The Bidder must demonstrate that the proposed resource has a minimum of 10 years of experience within the past 15 years of the RFP issuance date gathering business process requirements by facilitating workshops and interviews with Stakeholders.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>
M4	<p>The Bidder must demonstrate that the proposed resource has conducted development and implementation of 1 Project for a Public Sector client in at least 1 of the following areas:</p> <p>a) policies;</p>

Business Analyst – Advisory, Level 3	
MC#	Mandatory Technical Criteria
	<p>b) procedures; or c) guidelines.</p> <p>To demonstrate such experience, the Bidder must provide 1 Reference Project as defined in Appendix E to Annex A - Definitions and Acronyms.</p>
M5	<p>The Bidder must demonstrate that the proposed resource has a minimum of 10 years of experience within the past 15 years from the RFP issuance date conducting Stakeholder engagement and process mapping for a Public Sector client.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms .</p>
M6	<p>The Bidder must demonstrate that the proposed resource has a university degree from an accredited Canadian University, or equivalent, in commerce, business administration or statistics.</p> <p>For equivalency please refer to: http://www.cicic.ca/2/home.canada</p> <p>To demonstrate above, a copy of the degree must be provided with the bid.</p>

Business Analyst – Advisory, Level 3		
	Rated Technical Criteria	Point Scale
R1	<p>The Bidder should demonstrate that the proposed resource has at least 3 years of combined experience within the last 5 years of the RFP issuance date performing the following activities:</p> <p>a) Aligning IM/IT processes b) Implementing IM/IT processes; and c) Optimizing IM/IT processes.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 3 years = 0 points 3 to less than 5 years = 10 points 5 years and more = 15 points</p> <p>Maximum points available = 15 points</p>
R2	<p>The Bidder should demonstrate that the proposed resource has at least 3 years of experience within the last 10 years of the RFP issuance date providing strategic advice to management on improving the Software Development Lifecycle (SDLC) conceptual model.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 3 years = 0 points 3 to less than 5 years = 10 points 5 to less than 7 years = 15 points 7 years and more = 20 points</p> <p>Maximum points available = 20 points</p>
R3	<p>The Bidder should demonstrate that the proposed resource has a minimum of 5 years of experience, within the last 10 years of the RFP issuance date engaging Stakeholders to secure buy-in for organizational and process change.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 5 years = 0 points 5 to less than 7 years = 10 pts 7 to less than 9 years = 15 pts 9 years and more = 20 pts</p> <p>Maximum points available = 20 points</p>
<p>Total available points = 55 points Min pass mark = 40 points</p>		

2.2.2 Business Architect – Level 3

Business Architect – Level 3	
MC#	Mandatory Technical Criteria
M1	<p>The Bidder must demonstrate that the proposed resource has a minimum of 10 years of experience within the past 15 years of the RFP issuance date, performing the role of a Business Architect – Level 3 in accordance with the TBIPS Supply Arrangement.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p> <p>Referenced Projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category.</p>
M2	<p>The Bidder must demonstrate that the proposed resource has a minimum of 5 years of experience within the past 10 years of the RFP issuance date developing and documenting a service catalogue, including service levels, for IM/IT Projects.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>
M3	<p>The Bidder must demonstrate that the proposed resource has a minimum of 5 years of experience within the past 10 years of the RFP issuance date developing business cases and use cases for hyper convergence infrastructure.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>
M4	<p>The Bidder must demonstrate that the proposed resource has a minimum of 5 years of experience within the past 10 years of the RFP issuance date performing business analyses of functional requirements to identify information, procedures, and decision flows.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>

Business Architect – Level 3		
	Rated Technical Criteria	Point Scale
R1	<p>The Bidder should demonstrate that the proposed resource has a minimum of 5 years of experience within the past 15 years of the RFP issuance date developing business cases for a multi-year migration strategy.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 5 years = 0 points 5 to less than 10 years = 5 points 10 years and more = 10 points</p> <p>Maximum points available = 10 points</p>
R2	<p>The Bidder should demonstrate that the proposed resource has a minimum of 5 years of experience within the past 15 years of the RFP issuance date developing and documenting Statements of Requirements (SoR).</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 5 years = 0 points 5 to less than 10 years = 5 points 10 years and more = 10 points</p> <p>Maximum points available = 10 points</p>
R3	<p>The Bidder should demonstrate that the proposed resource has a minimum of 5 years of experience within the past 15 years of the RFP issuance date developing and implementing business and technology continuity plans.</p>	<p>Less than 5 years = 0 points 5 to less than 10 years = 5 points 10 years and more = 10 points</p>

Business Architect – Level 3		
Rated Technical Criteria		Point Scale
	To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.	Maximum points available = 10 points
R4	<p>The Bidder should demonstrate that the proposed resource has a minimum of 5 years of experience within the past 15 years of the RFP issuance date evaluating existing procedures and methods to identify and document items for improvement such as database content, structure, and application subsystems.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 5 years = 0 points 5 to less than 10 years = 5 points 10 years and more = 10 points</p> <p>Maximum points available = 10 points</p>
R5	<p>The Bidder should demonstrate that the proposed resource has a minimum of 5 years of experience within the past 15 years of the RFP issuance date defining and documenting interfaces for manual and automated operations.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 5 years = 0 points 5 to less than 10 years = 5 points 10 years and more = 10 points</p> <p>Maximum points available = 10 points</p>
<p>Total available points = 50 points Min pass mark = 35 points</p>		

2.2.3 Business Consultant – Level 3

Business Consultant – Advisory – Level 3	
MC#	Mandatory Technical Criteria
M1	<p>The Bidder must demonstrate that the proposed resource has a minimum of 10 years of experience within the past 15 years of the RFP issuance date, performing the role of a Business Consultant – Level 3 in accordance with the TBIPS Supply Arrangement.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p> <p>Referenced Projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category.</p>
M2	<p>The Bidder must demonstrate that the proposed resource has experience within the past 15 years of the RFP issuance date working on a minimum of 2 Large Projects in the development of strategic deployment of agile (collaborative procurement solutions) in an IM/IT environment.</p> <p>To demonstrate such experience, the Bidder must provide 2 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>
M3	<p>The Bidder must demonstrate that the proposed resource has experience as the principal author for at least 1 successful Treasury Board (TB) submission (successful = date TB approved submission) for Large IM/IT Projects for a Public Sector client.</p> <p>To qualify, the TB submission must have been approved by TB. The TB submission date must be included in the proposal to substantiate the information. The submission can be either preliminary or effective, or gated as per the current TBS Policy on the Management of Projects.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>

Business Consultant – Advisory – Level 3	
MC#	Mandatory Technical Criteria
M4	<p>The Bidder must demonstrate that the proposed resource holds at minimum 1 of the following certifications:</p> <ul style="list-style-type: none"> a) Prince2 Project Management Foundation / Practitioner; b) Certified Management Consultant (CMC); c) Certified Change Management Consultant; d) ITIL Foundation; or e) Lean Process Improvement. <p>To demonstrate above, a valid copy of the certification(s) must be provided with the bid.</p>

Business Consultant – Advisory – Level 3		
	Rated Technical Criteria	Point Scale
R1	<p>The Bidder should demonstrate that the proposed resource has experience within the past 15 years of the RFP issuance date gathering client requirements, and documenting 'as is' and 'to be' states.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 1 project = 0 points 1 project = 5 points 2 projects = 10 points 3 projects = 15 points 4 or more projects = 20 points</p> <p>Maximum points available = 20 points</p>
R2	<p>The Bidder should demonstrate that the proposed resource has experience as principal author for TB submissions in addition to the experience identified in M3.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms</p>	<p>1 additional submission = 5 points 2 additional submissions = 10 points 3 or more additional submissions = 15 points</p> <p>Maximum points available = 15 points</p>
R3	<p>The Bidder should demonstrate that the proposed resource has experience within the past 15 years from the RFP issuance date conducting a minimum of 1 of the following procurement processes for a Public Sector client:</p> <ul style="list-style-type: none"> a) Collaborative Procurement Solution Process; b) Joint Procurement Solution; OR c) SMART Procurement Process. <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 1 project = 0 points 1 project = 10 points</p> <p>Maximum points available = 10 points</p>
R4	<p>The Bidder should demonstrate that the proposed resource has experience within the past 15 years of the RFP issuance date performing industry scans, including attending industry analysis briefings and vendor sessions on opportunities and strategies to modernization enterprise class networks.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 1 project = 0 points 1 project = 10 points</p> <p>Maximum points available = 10 points</p>

Business Consultant – Advisory – Level 3		
Rated Technical Criteria		Point Scale
R5	<p>The Bidder should demonstrate that the proposed resource developed a minimum of 1 strategy and transformation business case.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 1 project = 0 points 1 project = 10 points 2 projects = 15 points</p> <p>Maximum points available = 15 points</p>
<p>Total available points = 70 points Min pass mark = 50 points</p>		

2.2.4 Business Transformation Architect – Advisory – Level 3

Business Transformation Architect – Advisory – Level 3	
MC#	Mandatory Technical Criteria
M1	<p>The Bidder must demonstrate that the proposed resource has a minimum of 10 years of experience within the past 15 years from the RFP issuance date, performing the role of a Business Transformation Architect – Level 3 in accordance with the TBIPS Supply Arrangement.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p> <p>Referenced Projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category.</p>
M2	<p>The Bidder must demonstrate that the proposed resource holds at minimum 1 of the following certifications:</p> <ul style="list-style-type: none"> a. Diploma or Degree in Business Administration or Commerce from a recognized College or University. For equivalency please refer to: http://www.cicic.ca/2/home.canada b. PMP (Project Management Professional) or Prince 2 certification. <p>To demonstrate above, a valid copy of the certification(s) must be provided with the bid.</p>
M3	<p>The Bidder must demonstrate that the proposed resource has worked on a minimum of 2 Large IM/IT Projects within the past 15 years of the RFP issuance date.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>
M4	<p>The Bidder must demonstrate that the proposed resource has a minimum of 7 years of combined experience within the past 15 years of the RFP issuance date supporting IM/IT projects by performing the following activities:</p> <ul style="list-style-type: none"> a) analyzing current (as-is) processes; b) developing target (to-be) processes; c) developing options and gap analysis providing recommendations; and d) developing impact, risk and cost analysis. <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>
M5	<p>The Bidder must demonstrate that the proposed resource has a minimum of 5 years of experience within the past 10 years of the RFP issuance date analyzing and supporting</p>

Business Transformation Architect – Advisory – Level 3	
MC#	Mandatory Technical Criteria
	<p>business transformation initiatives involving integrated risk assessment functionality in an IM/IT environment.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>

Business Transformation Architect – Advisory – Level 3		
Rated Technical Criteria		Point Scale
R1	<p>The Bidder should demonstrate that the proposed resource has project experience within the past 10 years from the RFP issuance date creating detailed roadmaps describing the development of IM/IT business processes.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 1 project = 0 points 1 project = 5 points 2 projects = 10 points 3 or more projects = 15 points</p> <p>Maximum points available = 15 points</p>
R2	<p>The Bidder should demonstrate that the proposed resource has a minimum of 3 years of experience within the past 10 years of the RFP issuance date developing action plans in support of Large IM/IT Projects.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 3 years = 0 points 3 to less than 5 years = 5 points 5 to less than 7 years = 10 points 7 years and more = 15 points</p> <p>Maximum points available = 15 points</p>
R3	<p>The Bidder should demonstrate that the proposed resource has a minimum of 3 years of experience within the past 10 years of the RFP issuance date developing and presenting options analysis and costing models in support of Large Projects.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 3 years = 0 points 3 to less than 5 years = 5 points 5 to less than 7 years = 10 points 7 years and more = 15 points</p> <p>Maximum points available = 15 points</p>
R4	<p>The Bidder should demonstrate that the proposed resource has a minimum of 3 years of experience within the past 10 years from the RFP issuance date developing and presenting options analysis and costing models in support of Large Projects.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 3 years = 0 points 3 to less than 5 years = 5 points 5 to less than 7 years = 10 points 7 years and more = 15 points</p> <p>Maximum points available = 15 points</p>
R5	<p>The Bidder should demonstrate that the proposed resource has a minimum of 3 years of experience within the past 10 years of the RFP issuance date developing and presenting briefings and presentations of IM/IT enabled initiatives or projects to Senior Executive Management in support of Large Projects for a Public Sector client.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 3 years = 0 points 3 to less than 5 years = 5 points 5 to less than 7 years = 10 points 7 years and more = 15 points</p> <p>Maximum points available = 15 points</p>

Solicitation Number:
B9220-220010/A

Amendment Number:

Buyer ID:
001XY

Business Transformation Architect – Advisory – Level 3		
Rated Technical Criteria		Point Scale
R6	<p>The Bidder should demonstrate that the proposed resource has experience within the past 10 years of the RFP issuance date developing application rationalization strategies and plans.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 1 project = 0 points 1 project = 5 points 2 projects = 10 points 3 or more projects = 15 points Maximum points available = 15 points</p>
R7	<p>The Bidder should demonstrate that the proposed resource has experience developing strategies for IM/IT projects linked to business drivers in support of Large Projects.</p> <p>To demonstrate such experience, the Bidder must provide 1 or more Reference Project(s) as defined in Appendix E to Annex A - Definitions and Acronyms.</p>	<p>Less than 1 project = 0 points 1 project = 5 points 2 or more projects = 10 points Maximum points available = 10 points</p>
<p>Total available points = 100 points Min pass mark = 70 points</p>		

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
CORPORATE CAPACITY**

FORM M1 CORPORATE CAPACITY	
1. In accordance with the requirements of mandatory evaluation criterion in WS1M-1 and WS2M-1 Bidders must provide the following information for the Reference Contract:	
a)	The name of the client organization:
b)	The client reference's name, telephone number or email address, and title:
c)	The Contract number:
d)	The start and end dates for the initial contract period, not including amendments:
e)	The current end date of the Contract:
f)	The total value (including applicable taxes) of the initial contract period, not including amendments
g)	The total invoiced amount (including applicable taxes) for the initial contract period, not including amendments
h)	A copy of the Contract Statement of Work and/or Task Authorization Statement of Work (SOW)
SOW Mapping	
2. Specify the resource category from this solicitations' SOW	Resource Category
3. 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 the Reference Contract. Example of text to be inserted: "Maps to Reference Contract SOW Task No. xx at page x of xxx")
b) (Insert Task from SOW)	(Insert Task from the Reference Contract)

Solicitation Number:
B9220-220010/A

Amendment Number:

Buyer ID:
001XY

c) (Insert Task from SOW)	(Insert Task from the Reference Contract)
d) (Insert Task from SOW)	(Insert Task from the Reference Contract)
e) (Insert Task from SOW)	(Insert Task from the Reference Contract)
f) (Insert Task from SOW)	(Insert Task from the Reference Contract)
Etc.	Etc.
For the purpose of this criterion, the term 'task' includes the tasks identified in the solicitation's SOW for the resource category. For example: If solicitation's SOW resource category identifies 15 tasks, the Bidder must use any 7 of the resource category's tasks in the solicitation's SOW to meet the 50% mapping requirement (50% of 15 = 7).	

Solicitation Number:
B9220-220010/A

Amendment Number:

Buyer ID:
001XY

FORM M2 BILLED DAYS

Form M2 is provided to assist Bidders in structuring the required information for WS1M-2 and WS2M-2. Bidders should replicate the form below as needed to provide the required information.

Reference Contract Number	Contract Period	Resource Category	Total Number of Billed Days
Total number of billed days:			

Solicitation Number:
B9220-220010/A

Amendment Number:

Buyer ID:
001XY

FORM R3 RESOURCE PLACEMENT

Form R3 is provided to assist Bidders in structuring the required information for WS1R-3 and WS2R-3.

Contract Information:						
Contract No.						
Contract Start Date: _____ Contract End Date: _____						
Client Information:						
Name of Client:						
Client's title:						
Name of Client Organization:						
Client Telephone Number or Email Address:						
Resource Information:						
Resource No.	Resource Category and Level	TA#	Resource Start Date	Resource End Date	TA Duration	Invoice Period
Resource No. 1						
Resource No. 2						
Resource No. 3						
Resource No. 4						
Resource No. 5						
Resource No. 6						
Resource No. 7						
Resource No. 8						
Resource No. 9						

FORM R4 DIVERSITY INCLUSION

Form R4 is provided to assist Bidders in structuring the required information for WS1R-4 and WS2R-4. Bidders should only provide information for the activities that have been implemented. Bidders should replicate Form R4 below as needed to provide the required information.

a.	Activity:	The Bidder has internally published policies or commitments on anti-racism and inclusiveness
Details of the activity:		
Copies of policy or commitment documents including effective dates:		Identify where copies are located in the bid:
b.	Activity:	The Bidder has publically available organizational commitments to a diverse workforce
Details of the activity:		
Copies of policy or commitment documents including effective dates:		Identify where copies are located in the bid:
c.	Activity:	The Bidder's employees are mandated to take mandatory training on anti-racism
Details of the activity:		
Training:		
Name of the course:		
Service provider; if developed internally, a copy of the course outline		If applicable, identify where a copy of the course outline is located in the bid:
d.	Activity:	The Bidder's employees are mandated to take unconscious bias training
Training:		
Name of the course:		
Service provider; if developed internally, a copy of the course outline		If applicable, identify where a copy of the course outline is located in the bid:
Details of the activity:		
e.	Activity:	The Bidder has developed internal staffing or recruitment strategy(ies) to increase representation of underrepresented groups in their workforce

Solicitation Number:
B9220-220010/A

Amendment Number:

Buyer ID:
001XY

Details of the activity:	
Copies of policy or commitment documents including effective dates:	Identify where copies are located in the bid:
Staffing:	
Copies of job posting, or other staffing and recruitment documents	Identify where copies are located in the bid:

Solicitation Number:
B9220-220010/A

Amendment Number:

Buyer ID:
001XY

FORM 5
ELECTRONIC PAYMENT INSTRUMENTS

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

() Direct Deposit (Domestic and International);



Contract Number / Numéro du contrat

 Security Classification / Classification de sécurité
 UNCLASSIFIED

SECURITY REQUIREMENTS CHECK LIST (SRCL)

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

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



PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? ☒ No ☐ Yes
Non Oui
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? ☒ No ☐ Yes
Non Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel :

Document Number / Numéro du document :

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

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

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

Special comments:

Commentaires spéciaux : _____

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.

REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

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

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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? ☒ No ☐ Yes
Non Oui

PRODUCTION

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

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

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? ☒ No ☐ Yes
Non Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? ☒ No ☐ Yes
Non Oui



Contract Number / Numéro du contrat

 Security Classification / Classification de sécurité
UNCLASSIFIED
PART C - (continued) / PARTIE C - (suite)

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

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

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.

Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

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

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?

La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?

☒ No
Non

☐ Yes
Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".

Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?

La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

☒ No
Non

☐ Yes
Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).

Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).