

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

Transport Canada /Transports Canada
Attention: Barbara Gorman
Email/Courriel: barbara.gorman@tc.gc.ca

**SOLICITATION AMENDMENT
MODIFICATION DE LA SOLLICITATION**

Comments – Commentaires

Proposal To: Transport 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 thereof.

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:

1. The Bidder considers itself and its products able to meet all the mandatory requirements described in the bid solicitation;
2. This bid is valid for the period requested in the bid solicitation;
3. All the information provided in the bid is complete, true and accurate; and
4. If the Bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation.

Proposition à : Transports 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-annexées, au(x) prix indiqué(s).

En apposant ma signature ci-après, j'atteste, au nom du soumissionnaire, que j'ai lu la demande de propositions (DP) en entier, y compris les documents incorporés par renvoi dans la DP et que :

1. le soumissionnaire considère qu'il a les compétences et que ses produits sont en mesure de satisfaire les exigences obligatoires décrites dans la demande de soumissions;
2. cette soumission est valide pour la période exigée dans la demande de soumissions ;
3. tous les renseignements figurant dans la soumission sont complets, véridiques et exacts; et
4. si un contrat est attribué au soumissionnaire, ce dernier se conformera à toutes les modalités énoncées dans les clauses concernant le contrat subséquent et comprises dans la demande de soumissions.

Title – Sujet	
Informatics Professional Services / Services informatiques professionnels	
Solicitation No. – N° de l'invitation	Date
T8080-200133-2	August 23 2021 / 23 août 2021
Client Reference No. – N° référence du client	
Amendment 5	
GETS Reference No. – N° de référence de SEAG	
Solicitation Closes L'invitation prend fin	
at – à	Time Zone Fuseau horaire
	Daylight Saving Time (DST)
on – le	July 27 August 4, August 12 2021 / 28 juillet 4 août 12 août August 25, 2021 / 25 août 2021 September 8 / 8 septembre 2021
F.O.B. - F.A.B.	
Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address inquiries to – Adresser toute demande de renseignements à :	
email/Courriel : barbara.gorman@tc.gc.ca	
Area code and Telephone No. Code régional et N° de téléphone	
343-550-2175	Email: barbara.gorman@tc.gc.ca
Destination – of Goods, Services, and Construction: Destination – des biens, services et construction	
National Capital Region	
Instructions: See Herein Instructions : Voir aux présentes	
Delivery required -Livraison exigée	Delivery offered -Livraison proposée
See Herein – Voir aux présentes	
Jurisdiction of Contract: Province in Canada the Bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in solicitation) Compétence du contrat : Province du Canada choisie par le soumissionnaire et qui aura les compétences sur tout contrat subséquent (si différente de celle précisée dans la demande)	
Vendor/firm Name and Address Raison sociale et l'adresse du fournisseur/de l'entrepreneur	
Telephone No. - N° de téléphone	
e-mail - courriel	
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

RFP QUESTIONS AND ANSWERS AND AMENDMENTS

File: T8080-200133-2

Initiative: Informatics Professional Services

RFP Issued: July 8, 2021

RFP Closes: ~~July 28~~ ~~August 4~~, ~~August 12~~, ~~August 25~~, September 8, 2021 02:00 PM

THIS SOLICITATION AMENDMENT IS RAISED TO:

1. Provide clarification and answers to questions from potential suppliers; and
2. Make amendments to the Request for Proposal.

Questions and Answers

Number	Questions/Answers
Question 50:	<p>For a project to qualify for MTC4 and MTC5 it must "...demonstrate that the Resource provided fifty percent (50%) or more of tasks identified in the Task Authorization Statement of Work." Several of these tasks refer to Transport Canada specific experience:</p> <p><i>J. Providing regular input into the TC Service Ecosystem to capture data and insights;</i> <i>L. Liaising with UX design, UI design, and development teams to learn about contextual insights related to service activities, user archetypes, employees archetypes, actions, and evidences, generalizing these insights, and capturing them in the TC Service Ecosystem. Leading the facilitation of design workshops and developing materials and approaches to build engagement with the Service Owners, employees, and users;</i> <i>P. Coaching, mentoring and training TC personnel to perform any of the above tasks.</i></p> <p>These tasks are common for most Business Transformation Architects and not only Business Transformation Architects with Transport Canada experience. Can you please clarify if the experience must be from Transport Canada to demonstrate equivalency with these three tasks?</p>
Answer 50:	<p>MTC4 and MTC5 read: "The Project must demonstrate that the Resource provided fifty percent (50%) or more of the tasks identified in the Statement of Work." As Transport Canada is looking for the experience vs experience within Transport Canada, Canada confirms that experience completing the specific tasks will be accepted regardless if they were performed within Transport Canada or another government organization.</p>
Question 51:	<p>For a project to qualify for RTC3 and RTC4, it "...should demonstrate that the proposed Technical Architect has completed one of the deliverables listed below." One of these deliverables refer to Transport Canada specific experience:</p> <p><i>14. Presentations on Lessons Learned and Artefacts/Plays to improve the maturity of design within the community of practice of Transport Canada.</i></p> <p>This deliverable is common for most Business Transformation Architects and not only Business Transformation Architects with Transport Canada experience. Can you please clarify if preparing this deliverable must be for Transport Canada to demonstrate equivalency with this deliverable.</p>
Answer 51:	<p>As Transport Canada is looking for the experience vs experience within Transport Canada, Canada confirms that deliverables prepared outside of Transport Canada will be accepted.</p>

Number	Questions/Answers
Question 52:	To be consistent with the changes to RTC1 and RTC2, please amend MTC1 to state “The Bidder must demonstrate its experience in providing, Stream 1: Applications Services or Stream 4: Business Services resources – utilizing Level 3 and/or Level 2 resources”.
Answer 52:	See Answer 9. MTC1 was written differently than RTC1 and RTC 2, hence why RTC1 and RTC2 required the amendment.
Question 53:	Our firm is seeking clarity on RCT2 (page 74). Could the Crown please confirm: a) that Bidders are to identify TA based contracts where, within the last three (3) years, they were contractually obligated to present resources in response to TA requests within five (5) business days?, and if this assumption is correct, and as successful resources often have their TAs extended, could the Crown please confirm that it is only the initial TA request that must have been for less than six (6) months?
Answer 53:	Canada confirms that Bidders are to provide contract details where Task Authorizations were issued for short term resource requests, including the requested task authorization start and end date and the final start and end date.
Question 54:	Re: RTC3 (page 77) & RTC4 (page 80): As mentioned by a Supplier at Question 6 (Amendment 1), at RTC3 and RTC4, the Crown is requesting that bidders include either proprietary documents (service design deliverables) that resources will likely be unable or unwilling to provide OR client attestation letters that will require an unreasonable investment of time. While we appreciate that the Crown amended the requirement in A1 at Q&A #6, to allow Bidders to provide the deliverable or attestation for only 1 project, we still feel that this is both an unreasonable request to place on our resources’ former clients AND an unfair advantage to the incumbent firm – as the incumbent firm would now be able to demonstrate compliancy by providing deliverables created for your organization. Respectfully, would the Crown please re-consider accepting demonstrated experience developing said deliverables? Suppliers could then provide a client name, phone number and email address to verify the experience, if required.
Answer 54:	Canada has reviewed the requests received with regards to providing attestations and design deliverables. Canada will now accept references whom must confirm details identified in an attestation letter. See amendment 14.
Question 55:	Due to the complex nature of this bid would the Crown please consider an additional 2 week extension?
Answer 55:	See Amendment 13 posted as Amendment 3.
Question 56:	Based on Q&A #7, our interpretation is that an equivalent Informatics Professional Services contract that is similar to the TBIPS Stream 1 or 4 categories will be accepted and that similar services to Stream 1 or Stream 4 can be completed under any contract and accepted as a reference. Please confirm our understanding.
Answer 56:	Canada confirms for MTC1 contracts whereas the services provided are in line with the Task and Deliverables identified in Annex A – Statement of Work will be accepted. For non-TBIPS contracts, bidders must map out the corresponding TBIPS categories under Stream 1 and Stream 4. See amendment 14
Question 57:	Re. MTC1, RTC1, and RTC2, please confirm that where the project reference is not a TBIPS contract, Transport Canada will accept Intermediate and Senior roles as Level 2 and Level 3 respectively.
Answer 57:	Canada confirms that it will accept Intermediate and Senior as Level 2 and Level 3 as long as the determination of the levels is in line with the experience levels of a Level 2 and Level 3 as identified in the TBIPS Method of Supply.
Question 58:	Please confirm that a Statement of Work, Purchase Order, or distinct contract for services will be considered equivalent to a Task Authorization for evaluation purposes of RCT2.

Number	Questions/Answers
Answer 58:	Bidders are reminded that it is their responsibility to show experience in providing multiple resources within 5 working days for work of a temporary nature where short term resource requests were issued.
Question 59:	The questions sent on July 16, we would like to retract Q6 and replace it with the following: Please confirm that the resource security required at bid closing is RELIABILITY.
Answer 59:	See Answer 40.
Question 60:	<p>MTC5 on the BTA L2 grid states:</p> <p><i>The Contractor must clearly demonstrate that the proposed Level 2 Business Transformation Architect has the following:</i></p> <p style="padding-left: 40px;"><i>Using projects, that the proposed Resource has a minimum of five years of experience within the past seven years in Service Design as a Level 2 resource in any Category within Stream 1: Applications Services or Stream 4: Business Services.</i></p> <p style="padding-left: 40px;"><i>The Project must demonstrate that the Resource provided fifty percent (50%) or more of tasks identified in the Statement of Work.</i></p> <p>We have the following questions/requests regarding this requirement:</p> <ul style="list-style-type: none"> • Please confirm the projects identified here can be private sector or public sector, as long as each one demonstrates 50% or more of the tasks identified in this requirement's statement of work. • The phrase "As a Level 2 resource" implies that the resource needs to have had 5 years of relevant experience prior to the commencement of each project used toward MTC5 experience which, in combination with the 5 years of experience required to meet MTC5, means MTC5 actually requires 10 years of relevant experience—which is more appropriate for a level 3 resource. Please confirm that, since the Crown is seeking a Level 2 resource, the proposed resource only needs to demonstrate 5 years of relevant experience as defined in the requirement, rather than 5 years as a Level 2 resource. <p>If the answer is yes to both items above, please then confirm that the requirement should be revised as follows:</p> <p><i>The Contractor must clearly demonstrate that the proposed Level 2 Business Transformation Architect has the following:</i></p> <p style="padding-left: 40px;"><i>Using projects, that the proposed Resource has a minimum of five years of relevant experience within the past seven years in Service Design; each project as a Level 2 resource in any Category within Stream 1: Applications Services or Stream 4: Business Services.</i></p> <p style="padding-left: 40px;"><i>The Project must demonstrate that the Resource provided fifty percent (50%) or more of tasks identified in the Statement of Work.</i></p>

Number	Questions/Answers
Answer 60:	<p>Canada confirms for MTC4 and MTC5, experience must be in line with categories within Stream 1 and/or Stream 4 and demonstrate 50% or more of the tasks identified in the Statement of Work. If non TBIPS experience is being used, bidders must map out the corresponding category within the 2 Streams. In addition, See Amendment 14</p> <p>Canada has reviewed your request and agrees to amend MTC5 to remove the “as a Level 2 resource”. See Amendment 14.</p>

<p>Question 61:</p>	<p>MTC6 on the BTA L3 grid states:</p> <p><i>The Contractor must clearly demonstrate that the proposed Level 3 Business Transformation Architect has the following:</i></p> <ol style="list-style-type: none"> 1) <i>Using projects, that the proposed Resource has a minimum of ten years of experience within the past twelve years in Service Design as a Level 3 resource in any Category within Stream 1: Applications Services or Stream 4: Business Services.</i> <p style="text-align: center;"><i>Or</i></p> <ol style="list-style-type: none"> 2) <i>Using projects, that the proposed Resource has a minimum of five years of experience within the past twelve years in Service Design as a Level 3 resource in any Category within Stream 1: Applications Services or Stream 4: Business Services with recognized professional certification.</i> <p style="text-align: center;"><i>The Project must demonstrate that the Resource provided fifty percent (50%) or more of tasks identified in the Statement of Work.</i></p> <p>We have the following questions/requests regarding this requirement:</p> <ul style="list-style-type: none"> • Please confirm the projects identified here can be private sector or public sector, as long as each one demonstrates 50% or more of the tasks identified in this requirement’s statement of work. • The phrase “As a Level 3 resource” implies that the resource needs to have had 10 years of relevant experience prior to the commencement of each project used toward MTC6, which requires an additional 5-10 years of experience (depending on whether the resource meets using option 1 or 2) to pass. We do not believe it was the Crown’s intent to require more than the 15-20 years to demonstrate level 3 category-relevant experience, and that 10 years of relevant experience, as defined in this requirement, should be sufficient. Please confirm. <p>If the answer is yes to both items above, please then confirm that the requirement should be revised as follows:</p> <p><i>The Contractor must clearly demonstrate that the proposed Level 3 Business Transformation Architect has the following:</i></p> <ol style="list-style-type: none"> 1) <i>Using projects, that the proposed Resource has a minimum of ten years of experience within the past twelve years in Service Design. as a Level 3 resource in any Category within Stream 1: Applications Services or Stream 4: Business Services.</i> <p style="text-align: center;"><i>Or</i></p> <ol style="list-style-type: none"> 2) <i>Using projects, that the proposed Resource has a minimum of five years of experience within the past twelve years in Service Design. as a Level 3 resource in any Category within Stream 1: Applications Services or Stream 4: Business Services with recognized professional certification.</i> <p style="text-align: center;"><i>Each Project must demonstrate that the Resource provided fifty percent (50%) or more of tasks identified in the Statement of Work.</i></p>
<p>Answer 61:</p>	<p>Canada confirms for MTC4 and MTC5, experience must be in line with categories within Stream 1 and/or Stream 4 and demonstrate 50% or more of the tasks identified in the</p>

Number	Questions/Answers
	<p>Statement of Work. If non TBIPS experience is being used, bidders must map out the corresponding category within the 2 Streams. In addition, See Amendment 14</p> <p>Canada has reviewed your request and MTC4 remains as is.</p>
Question 62:	<p>With regard to RTC3 (Senior BTA) and RTC4 (Intermediate BTA), we find the requirement to be unduly stringent and therefore not following the Federal government's principles of fair, open and transparent procurement. We have provided RTC3 and RTC4 to our candidates, with several declining to be submitted, and providing us with the following valid feedback;</p> <p>The requirement to provide a deliverable or a lengthy client attestation letter as written currently it unfairly favours the incumbent. Furthermore, the solicitation asks for a copy of deliverables, without providing details into the contents of the deliverable – some deliverables have the same name but different contents, others have different contents but the same name. It is spurious logic that a deliverable list in an RFP would alone ensure selection of the right resource.</p> <p>This is outside normal industry practices. Few consultants will request former clients such a lengthy attestation letter requiring several paragraph length responses. Industry standards have been to include contact details for client references.</p> <p>Transport Canada has struggled with bids submissions for this RFP because of the difficult requirements. We are, therefore, asking the Crown to amend RTC3 (Senior BTA) and RTC4 (Intermediate BTA) to require client reference contact details in lieu of an attestation letter and/or a validation interview with the candidates. In doing so, Transport Canada will guarantee increased participation from vendors, resulting in more choices for the client, which will support PWGSC's published mandate to enhance "...access, competition and fairness", as well as ensure the best overall value for Transport Canada.</p>
Answer 62:	See Answer 54.
Question 63:	<p>MTC4 and MTC5 are worded to favour proponents that have worked with Transport Canada and its "Service Ecosystem". When mapping the required 50% of "tasks identified in the Statement of Work", this provides an unfair advantage. Specifically task bullets;</p> <ul style="list-style-type: none"> • j. Providing regular input into the TC Service Ecosystem to capture data and insights. • l. Liaising with UX design, UI design, and development teams to learn about contextual insights related to service activities, user archetypes, employees archetypes, actions, and evidences, generalizing these insights, and capturing them in the TC Service Ecosystem. Leading the facilitation of design workshops and developing materials and approaches to build engagement with the Service Owners, employees, and users. • p. Coaching, mentoring and training TC personnel to perform any of the above tasks. <p>We ask the Crown to amend these 3 bullets to remove the references to Transport Canada and its Service Ecosystem to level the playing field for candidates with analogous experience in other federal departments.</p>
Answer 63:	See Answer 50 and 51.
Question 64:	Given the complexity of the bid, as well as the recently updated mandatory and rated requirements, we respectfully request a two-week extension to the bid closing date.
Answer 64:	See Amendment 13 posted as Amendment 3.

Number	Questions/Answers
Question 65:	Given that we have yet received answers to our questions from last week (which may significantly alter our bid approach) and in view of August 2 being a statutory holiday, could we request a one-week extension to the bid deadline (August 11, 2021)?
Answer 65:	See Amendment 13 posted as Amendment 3.
Question 66:	Due to the recent extension to the closing date, the time it has taken to deliver responses and AMD, and the scope of recent changes via Q&A, we would request that the deadline for inquiries be extended to August 2 (in line with the 10 days allocated in the RFP).
Answer 66:	See Amendment 13 posted as Amendment 3.
Question 67:	Regarding Question 39, would the Crown please confirm that only one Attachment 3.1 – Customer Reference Form is required to be provided for each candidate – meaning that a total of two client references are required? If so, would the Crown please amend Attachment 3.1 accordingly?
Answer 67:	As detailed in paragraph 2.5 of Attachment 4.1, Bidders are reminded that “For each proposed Resource, the Bidder must provide two (2) client references presented in the format indicated in Attachment 3.1 – Customer Reference Form”.
Question 68:	<p>We strongly request that the provision of a copy of a deliverable and/or signed client letter be removed from Rated Criteria RTC3 and RTC4 for the following reasons:</p> <ul style="list-style-type: none"> • It heavily favours the incumbent vendor as Transport Canada itself could approve the release of a deliverable and/or easily obtain a signed letter attesting to the deliverable details, while other departments may not be as willing or able to do so for a variety of reasons (protecting proprietary information, disinterest in supporting the vendor, etc.) • Other client departments are far less inclined to approve the release of a secure documents and/or support the sharing of proprietary information required to be divulged within the letter. Doing so risks the department’s integrity and the client would have no reason to do so outside of supporting the career of a past contractor. • Highly qualified candidates with valid experience developing relevant deliverables for clients such as the Communications Security Establishment (CSE), Department of National Defence (DND), and other highly secure departments, would have no way of scoring any points on RT3/RTC4 due to the confidential nature of the environments, which is unnecessarily discriminatory behaviour on the part of the Crown and goes against ethical procurement practices. • Client references are already required to be provided for candidate projects being cited, including an uncommon amount of information required within Attachment 3.1. If the Crown wishes to question the production of a deliverable and its quality, they can do so by contacting the candidate’s client reference (which is common practice within TBIPS RFPs). • Task Authorizations (TA) issued after contract award would include these same strict requirements, which would unnecessarily complicate the TA process and thus extend the amount of time it would take for the Crown to onboard otherwise highly-qualified resources. <p>The Crown risks not receiving a bid in response to this solicitation for the third time if these requirements are not amended to allow vendors to submit quality and highly-qualified candidates.</p>
Answer 68:	See answer 54.

Number	Questions/Answers
Question 69:	In Amendment 02, QA 47, Transport Canada responded that Bidders can only use contracts from the TBIPS method of supply for RTC1. The TBIPS method of supply is exclusive to federal government departments, and precludes a Bidder's ability to demonstrate their relevant municipal, provincial or Crown Corporation experience. Further, it unfairly excludes Bidders with demonstrated federal government experience with other relevant methods of supply, such as THS, ProServices, SBIPS and TSPS. This response also contradicts requirement MTC1 where Transport Canada is also requesting resources from Stream 1: Application Services and/or Stream 4: Business Services (which implies resources exclusively from the TBIPS method of supply), but Amendment 01, QA 7, states that <u>all levels of government</u> will be accepted. Given these contradictions, we ask that Transport Canada treat MTC1 and RTC1 in the same manner, and amend RTC1 to state all levels of government will be accepted.
Answer 69:	Canada has reviewed your request and agrees to amend RTC1 to include all levels of government. See Amendment 14.
Question 70:	Due to the fact that many senior contractors often take extended leaves between contract engagements and the already added difficulty of needing to match 50% of the Statement of Work tasks, would the Crown please amend Mandatory Criterion MTC4 to require "a minimum of ten years of experience within the past fifteen years".
Answer 70:	Canada has reviewed your request and MTC4 remains as is.

Amendment

14. DELETE THE ATTACHMENT 4.1 BID EVALUATION CRITERIA in its entirety and REPLACE with the following:

**ATTACHMENT 4.1
BID EVALUATION CRITERIA**

1. The evaluation criteria contained in this attachment will be used to evaluate bids during the solicitation.
2. The Bidder must not propose the same resource more than once in response to this solicitation.
3. The tables should not contain all the project information from the resume. Only the page number of the résumé should be incorporated so that the assessor can verify this information.

4. Where bidders are using non-TBIPS contracts to demonstrate experience, bidders must map out the corresponding TBIPS categories under Stream 1 and/or Stream 4.

Part A: Corporate Mandatory Criteria

MTC #	Criteria	Bidder's Response (Reference to additional substantiating materials included in the Bid)
MTC1	<p>BIDDER'S PROJECT EXPERIENCE</p> <p>The Bidder must demonstrate its experience in providing, Stream 1: Applications Services and Stream 4: Business Services Resources – utilizing Level 3 and or Level 2 resources by presenting at least one project (contract) whereas the services provided are in line with the</p>	

MTC #	Criteria	Bidder's Response (Reference to additional substantiating materials included in the Bid)
	<p>Tasks and Deliverables AND Technologies identified in Annex A – Statement of Work. The project must be for services provided for a Government organization client.</p> <p>To be accepted, each contract must:</p> <ol style="list-style-type: none"> 1. have been with a single client; 2. have been awarded within the past five years prior to the solicitation closing date; 3. have an initial minimum value of \$1,000,000.00 (CAD) excluding applicable taxes; 4. have an initial minimum Contract Period of one year; and 5. have provided at least five resources from any of the Categories under Stream 1: Applications Services or Stream 4: Business Services, simultaneously or consecutively for a period of at least 12 consecutive months where at least three fifths of the resources were Level 3. <p>To demonstrate this experience, the Bidder must provide a brief description and a customer reference for the Informatics Professional Services contract. The description and reference must include the following information:</p> <ol style="list-style-type: none"> 1. A description of the project outcomes, tasks and deliverables; 2. The first and last name of the resource(s) and the total number of days billed per resource under the Contract; 3. A Contract serial number or other unique contract identifier; 4. The start date and expiry date of the Contract; 5. The Contract value, including GST/HST; 6. The number of Resources simultaneously or consecutively provided concurrently over 12 months where at least three fifths of the resources were Level 3; 7. The organization name; 8. The name, title, and either the telephone number or email address of the organization's contact responsible for the contract who can validate the information presented; and 9. The front page of each of the reference Contract. <p>It is the Bidder's responsibility to ensure that any information divulged is with the permission of the reference provided.</p>	
MTC2	The Bidder must provide one resume for a B.7 Business Transformation Architect Resource - Level 3.	
MTC3	The Bidder must provide one resume for a B.7 Business Transformation Architect Resource - Level 2.	

Part B: POINT RATED CORPORATE EXPERIENCE

RTC #	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials included in Bid)
RTC1	<p>The Bidder should have experience providing IT Professional Service Resources to undertake work that is the same or similar* as the tasks identified in Annex A of this Bid Solicitation.</p> <ol style="list-style-type: none"> 1. Using one or more reference Contract(s) that have been completed or are ongoing in the last seven years as of bid closing date, the Bidder should demonstrate that it has experience simultaneously or consecutively providing three or more resources from either Stream 1: Applications Services or Stream 4: Business Services; 2. Each Contract identified must: <ol style="list-style-type: none"> a) Have an Initial Contract Period of at least three months, not including amendments, where the Bidder provided Level 2 and/or Level 3 resources from Stream 1: Applications Services or Stream : Business Services - where at least two thirds of the resources were Level 3. across different Contracts as long as the services were provided simultaneously; b) The services provided by each Resource must have been the same or similar* to at least four of the tasks identified in Annex A Statement of Work of this Bid Solicitation; 3. The Bidder should provide the following information for each Contract identified: <ol style="list-style-type: none"> a) The name of the organization; b) The Client's full name, title, email address, and telephone number; c) The Contract number or reference number; d) The Project name under which the services were provided (if applicable); e) The start and end dates for the Initial Contract; <p>Period, not including amendments;</p>	40	A total of five (5) points will assigned per three month period for a maximum of forty (40) points.	

RTC #	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials included in Bid)
	<p>f) The number of Resources provided; and g) The description of the services provided including specific timelines by the Resource to demonstrate compliance with the identified tasks.</p> <p>Note to Bidder: The reference Contract must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p> <p>*Similar is defined as industry accepted service design methods and practices resulting in their associated artifacts.</p>			
RCT2	<p>The Bidder should have experience in providing multiple Stream 1: Applications Services or Stream 4: Business Services - utilizing Level 3 and/or Level 2 resources within 5 business days for work of a temporary nature of three to six (3 to 6) months or less.</p> <p>1. Each Contract identified must:</p> <ul style="list-style-type: none"> a) Have been with a single client on a single contract on which Task Authorizations for the short term resource requests were issued; b) The submitted requests occurred within the last three (3) years as of the bid closing date. <p>2. The Bidder should provide the following information for each Contract identified:</p> <ul style="list-style-type: none"> a) The name of the client organization; b) The project name under which services were provided (if applicable); c) The client's full name; 	20	A total of five (5) points will be allocated for each contract	

RTC #	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials included in Bid)
	<p>d) The client's title, email address and telephone number; e) The Contract number or reference number; f) The requested task authorization start and end date; g) The final task authorization start and end date; h) Total effort on the task authorization; and i) Task authorization description of tasks and deliverables.</p> <p>Note to Bidder: The reference Contract must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>			
Maximum Score				60
Minimum score required to be compliant (70%)				42

RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE

B. 7 Business Transformation Architect (*Service Design*) Resource - Level 3

#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC4	<p>The Contractor must clearly demonstrate that the proposed Level 3 Business Transformation Architect has the following:</p> <p>1) Using projects, that the proposed Resource has a minimum of ten years of experience within the past twelve years in Service Design as a Level 3 resource in any Category within Stream 1: Applications Services or Stream 4: Business Services.</p> <p>Or</p> <p>2) Using projects, that the proposed Resource has a minimum of five years of experience within the past twelve years in Service Design as a Level 3 resource in any Category within Stream 1: Applications Services or Stream 4: Business Services with recognized professional certification.</p> <p>The Project must demonstrate that the Resource provided fifty percent (50%) or more of tasks identified in the Statement of Work.</p> <p>The following information must be provided to be considered:</p> <ul style="list-style-type: none"> • Organization Name; • Project Name; • Role on Project; • Duration; and • Valid Reference and Contact information. 		

RTC #	Rated Technical Criteria	Maximum Points	Points Allocation
RTC3	<p>The Contractor should demonstrate that the proposed Level 3 Technical Architect has completed one of the deliverables listed below while working on a project listed in MTC4.</p> <p>The following deliverables will be accepted and must demonstrate that they consider interactions and experience in terms of effectiveness, efficiency, and satisfaction across services and service activities (i.e. they cannot focus on a single service activity or touchpoint).</p> <ol style="list-style-type: none"> 1. Service vision or strategy (e.g. Channel Strategy, SWOT, Lean Business Model, Customer Lifecycle Maps, Value Stream Maps); 2. Service Design strategies and plans; 3. Objectives, benefits, key results or other factors that define the success of a service or service activities that include metrics that quantify success in terms of the effectiveness, efficiency, and satisfaction to enhance the overall client experience (CX) and employee (EX) of the service or service activities; 4. Research strategies and plans; 5. Research artifacts or visualization (e.g. Personas, Journey Maps, Service Blueprints, System Maps, Jobs to be Done, User Stories, Story Boards); 6. Reports detailing the synthesis and analysis or research activities; 7. Ideation artifacts or visualizations (e.g. Affinity Maps, Clustering, Sorting, and Refining Ideas, Decision Matricies); 8. Reports detailing the synthesis and analysis of ideation activities; 9. Contextual service prototypes (e.g. Simulations, Investigative Rehearsals, Pilots, Service Safaris, Story Boards, interactive prototypes, Service Staging, Future State Journey Maps, Future State Service Blueprints); 10. Reports detailing the synthesis and analysis of prototyping activities; 11. Service Design Deliverables (SWOT, Service Safaris, Client Journeys, Process Diagrams, Service Blueprints, Channel Strategy, Story Boards, Service Staging, Process Map, Organizational Structure, Jobs to be Done) 12. Artifacts resulting from design workshop facilitation; 13. Reports or presentations on recommended improvements of services and service activities focused on improving effectiveness, efficiency, and satisfaction to enhance the overall client 	<p style="text-align: center;">20</p>	<p>Four (4) points per project supported by design deliverables; up to five (5) projects (20 points).</p>

	<p>experience (CX) and employee experience (EX); and</p> <p>14. Presentations on Lessons Learned and Artefacts/Plays to improve the maturity of design within the community of practice of Transport Canada.</p> <p>1) A copy of the completed design deliverable developed by the proposed Resource must be provided.</p> <p>OR</p> <p>2) A signed letter from the client attesting to the completed design deliverables developed by the proposed resource.</p> <p>The letter must include the following:</p> <ul style="list-style-type: none"> • Name of the product; • Who the product was for (organization and name of Point of Contact); • Reasons for creating this type of product; • Goal of creating the product; • Paragraph explaining the product; • Paragraph explaining the desired outcomes the product was helping to achieve and an explanation of how the product helped to achieve them; and • Paragraph describing the quality of the product. <p>OR</p> <p>3) <u>A signed letter from the resource demonstrating the completion of the design deliverable and the letter must include:</u></p> <ul style="list-style-type: none"> • <u>Name of the product;</u> • <u>Who the product was for (organization and name of Point of Contact);</u> • <u>Reasons for creating this type of product;</u> • <u>Goal of creating the product;</u> • <u>Paragraph explaining the product;</u> • <u>Paragraph explaining the desired outcomes the product was helping to achieve and an explanation of how the product helped to achieve them;</u> • <u>Paragraph describing the quality of the product; and</u> • <u>Customer Reference and contact information who can verify the information included in the letter.</u> 		
Maximum Score Possible			20
Minimum score required to be compliant (70%)			14

B.7 Business Transformation Architect (Service Design) Resource - Level 2

MTC #	Mandatory Technical Criteria	Met/ Not Met	Contractor's Response (Cross Reference to Résumé)
MTC5	<p>The Contractor must clearly demonstrate that the proposed Level 2 Business Transformation Architect has the following:</p> <p>1) Using projects, that the proposed Resource has a minimum of five years of experience within the past seven years in Service Design <u>as a Level 2 resource</u> in any Category within Stream 1: Applications Services or Stream 4: Business Services.</p> <p>The Project must demonstrate that the Resource provided fifty percent (50%) or more of tasks identified in the Statement of Work.</p> <p>The following information must be provided to be considered:</p> <ul style="list-style-type: none"> • Organization Name; • Project Name; • Role on Project; • Duration; and • Valid Reference and Contact information 		

RTC #	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials included in Bid)
RTC4	<p>The Contractor should demonstrate that the proposed Resource Level 2 has completed one of the deliverables listed below while working on a project listed in MTC5.</p> <p>The following deliverables will be accepted and must demonstrate that they consider interactions and experience in terms of effectiveness, efficiency, and satisfaction across services and service activities (i.e. they cannot focus on a single service activity or touchpoint).</p> <ol style="list-style-type: none"> 1. Service vision or strategy (e.g. Channel Strategy, SWOT, Lean Business Model, Customer Lifecycle Maps, Value Stream Maps); 2. Service Design strategies and plans; 3. Objectives, benefits, key results or other factors that define the success of a service or service activities that include metrics that quantify success in terms of the effectiveness, efficiency, and satisfaction to enhance the overall client experience (CX) and employee (EX) of the service or service activities; 4. Research strategies and plans 5. Research artifacts or visualization (e.g. Personas, Journey Maps, Service Blueprints, System Maps, Jobs to be Done, User Stories, Story Boards); 6. Reports detailing the synthesis and analysis or research activities 7. Ideation artifacts or visualizations (e.g. Affinity Maps, Clustering, Sorting, and Refining Ideas, Decision Matrices); 8. Reports detailing the synthesis and analysis of ideation activities; 9. Contextual service prototypes (e.g. Simulations, Investigative; Rehearsals, Pilots, Service Safaris, Story Boards, interactive prototypes, Service Staging, Future State Journey Maps, Future State Service Blueprints); 	10	2 points per project supported by design deliverables; up to 5 projects (10 points).	

RTC #	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials included in Bid)
	<p>10. Reports detailing the synthesis and analysis of prototyping activities;</p> <p>11. Service Design Deliverables (SWOT, Service Safaris, Client Journeys, Process Diagrams, Service Blueprints, Channel Strategy, Story Boards, Service Staging, Process Map, Organizational Structure, Jobs to be Done);</p> <p>12. Artifacts resulting from design workshop facilitation;</p> <p>13. Reports or presentations on recommended improvements of services and service activities focused on improving effectiveness, efficiency, and satisfaction to enhance the overall client experience (CX) and employee experience (EX); and</p> <p>14. Presentations on Lessons Learned and Artefacts/Plays to improve the maturity of design within the community of practice of Transport Canada.</p> <p>1) A copy of the completed design deliverable developed by the proposed Resource must be provided.</p> <p>OR</p> <p>2) A signed letter from the client attesting to the completed design deliverables developed by the proposed resource.</p> <p>The letter must include the following:</p> <ul style="list-style-type: none"> • Name of the product; • Who the product was for (organization and name of Point of Contact); • Reasons for creating this type of product; • Goal of creating the product; • Paragraph explaining the product; • Paragraph explaining the desired outcomes the product was helping to achieve and an explanation of 			

RTC #	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials included in Bid)
	<p>how the product helped to achieve them; and</p> <ul style="list-style-type: none"> • Paragraph describing the quality of the product. <p>OR</p> <p>3) <i>A signed letter from the resource demonstrating the completion of the design deliverable and the letter must include:</i></p> <ul style="list-style-type: none"> • <i>Name of the product;</i> • <i>Who the product was for (organization and name of Point of Contact);</i> • <i>Reasons for creating this type of product;</i> • <i>Goal of creating the product;</i> • <i>Paragraph explaining the product;</i> • <i>Paragraph explaining the desired outcomes the product was helping to achieve and an explanation of how the product helped to achieve them;</i> • <i>Paragraph describing the quality of the product; and</i> • <i>Customer Reference and contact information who can verify the information included in the letter.</i> 			
Maximum Score Possible				10
Minimum score required to be compliant (70%)				7

INTERVIEW OF PROPOSED RESOURCE

1. Canada may elect to virtually interview proposed Resources.
 - 1.1 Interviews scheduled by Canada and communicated to the Vendor no less than three (3) working days prior to the scheduled interview. Interviews will be scheduled between 9:00 a.m. and 3:00 p.m. Whether or not to schedule any interviews outside of the period identified will be within the sole discretion of Canada.
 - 1.2 If an interview of the proposed Resource is deemed required by Canada, the Vendor will be contacted by Canada at least three business days prior to the assigned interview date and time slot for the proposed Resource.
 - 1.3 Vendors must confirm receipt and acceptance of the date and time to the Contracting Authority within two (2) working days. Any Vendor who fails to provide confirmation within the specified timeframe will

be deemed to have waived the opportunity complete this evaluation activity and will be declared non-compliant.

- 1.4 Each scheduled interview will last no longer than 40 minutes in duration.
- 1.5 The interview will be conducted in the preferred official language of the proposed Resource.
- 1.6 The Vendor will be permitted to have one (1) representative present for the interview.
- 1.7 At least three (3) evaluators will be present for each presentation. The Contracting Authority and/or another representative from TC Contracting Services, will also be present during each presentation.
- 1.8 The interview will be conducted in accordance with the following process outlined below:

a) The proposed Resource will be required to provide answers to the following five (5) questions:

Question No.	Interview Question for Proposed Resource	Scoring
1	You are asked to assist a Service provider in base lining their service to meet the requirements of the Service Catalog on Policy on Service Digital. How do you approach this?	Yes= Pass No= Fail
2	Tell me about a time where you supported a Service Provider in meeting their Service standards or service level agreement. How did you do this?	Yes= Pass No= Fail
3	Tell me about a time where you taught others the importance of service design and transferred some of your knowledge. How did you do this?	Yes= Pass No= Fail
4	What is your proudest achievement related to Service Design based on Tasks similar to Annex A?	Yes= Pass No= Fail
	What is your biggest lesson learned related to Service Design based on Tasks similar to Annex A?	Yes= Pass No= Fail

- 1. b) Evaluators present at the interview will rate responses provided by the proposed Resource, in order to determine the proposed Respondent’s suitability to complete the Work identified in Annex A. Evaluators will aim to confirm the following for each provided response:

(1) The proposed Resource has solid capabilities and competences to conduct Service Design work that include (but is not limited to):

Responses are limited to the scope of: User Interface (UI) and/or IT Requirements and/or Application Development and/or Project Management

- Any other responses unrelated to Service Design
- Actions taken by the resource do not demonstrate: good judgement, problem-solving skills, efficiency/effectiveness and an understanding of key legislation, policies and directives

(2) Provided responses clearly demonstrated how the resource has worked with products, people and processes for the end to end of the service (channels and touch points)

- Actions taken by the resource demonstrated: good judgement, problem-solving skills, efficiency/effectiveness and an understanding of key legislation, policies and directives
- c) Evaluators will also be provided a copy of the curriculum vitae (CV) for the proposed Resource (submitted in response to (MTC1, MTC2, MTC3, MTC4 and MTC5) which may be considered by the evaluators when evaluating responses.
- d) For each question listed above in sub-section (a), evaluators will allocate a pass or fail mark based on consensus evaluations.
- 1.9 In order to successfully complete the evaluation process, the proposed Resource must be assessed by the evaluation team as:
- 1.a) scoring a pass mark for all five (5) questions listed in sub-section (a);
 b) demonstrating in the responses during the interview that they have an ability to work with products; and
 c) Any proposed Resource that does not demonstrate these items to the evaluation team will be declared non-compliant.
- 2.0 Customer Reference Check
- 2.1 A Customer Reference Check may be conducted for the provided references.
- 2.2 The evaluation process is an optional evaluation phase in which Canada may elect to conduct a Customer Reference Check to complete the evaluation process.
- 2.3 Customer references must confirm the information provided by the Vendor regarding proposed resource's projects and be able to respond to other relevant questions.
- 2.4 The Vendor is solely responsible for ensuring that it provides a contact person who is knowledgeable about the services the Vendor has provided to the customer reference organization and who is willing to act as a customer reference. Crown references will be accepted.
- 2.5 For each proposed Resource, the Vendor must provide two (2) client references presented in the format indicated in Attachment 3.1 – Customer Reference Form. Each client reference must meet the following requirements in order to be considered:
- i. The identified point of contacts (who provide the customer reference on behalf of the customer organization must have directly reviewed the work of the proposed Resource in a position equivalent to a manager (e.g. Deputy Director, Chief, Team Leader) or higher. Canada will not consider any provided customer references where the identified points of contact do not meet this requirement.
 - ii. The client reference must include all requested information identified in Attachment 3.1. Canada will not consider any additional information provided by the Vendor.
 - iii. The client reference for the proposed Resource cannot be for Work provided by the proposed Resource to the Vendor as a customer. Canada will not consider a reference if the customer organization identified in Attachment 3.1 is either:
 - iv. Itself;
 - v. an affiliate; or
 - vi. other entity that does not deal at arm's length with the Vendor.

2.6 The validation of customer references will be conducted in accordance with the following process outlined below:

1.a) Canada will select one of the two provided customer references, and will use that selected reference for the purposes of evaluation. This selection will be made on a random basis, such as by drawing numbers from a hat regarding which of references 1 or 2 will be contacted.

b) Once selected, Canada will set aside the other customer reference entirely (i.e., if the Resource scores poorly or the contact for the selected customer reference organization does not respond, the Resource will receive that score, and Canada will not conduct a reference check for a different customer reference).

c) Canada will conduct reference checks in writing by email (unless the contact person for the reference is only available by telephone). Canada will send all email reference check requests to contacts supplied by the Vendors on the same day using the email address(es) provided in the bid (in the case of any telephone reference checks, Canada will contact the reference as soon as possible after email reference checks have been sent, but it may not occur on the same day).

2.d) The selected client references will be contacted to provide answers to the following five (5) questions:

Question No.	Question for Customer Reference	Scoring
1	Overall, were you satisfied with the quality of the work prepared for your review by the Resource?	<i>Yes= Pass</i> <i>No= Fail</i>
2	When problems were found in the Resource's work, was the Resource responsive and timely in resolving the issues? Consider the quality of the resolution in your response.	<i>Yes= Pass</i> <i>No= Fail</i>
3	Did the Resource take your comments and suggestions into consideration?	<i>Yes= Pass</i> <i>No= Fail</i>
4	Did the Resource demonstrate the ability to work independently with little guidance and/or monitoring?	<i>Yes= Pass</i> <i>No= Fail</i>
5	Can you confirm that the Resource provided knowledge transfer and/or trained your or your team to continue their duties after their departure?	<i>Yes= Pass</i> <i>No= Fail</i>

e) Given the information that Canada seeks to confirm with a reference is mandatory, Canada will declare the propose resource non-compliant if the response from the contact person at the reference is not received within five (5) working days of the date that Canada's email was sent (or within five (5) working days of leaving a voicemail message for a telephone reference).

f) On the third working day after sending out the reference check request, if Canada has not received a response, Canada will notify the Vendor by email, to allow the Vendor to contact its reference directly to ensure that it responds to Canada within five (5) working days. If the individual named by a Vendor is unavailable when required during the evaluation period, the Vendor may provide the name and email address of an alternate contact person from the same customer organization, provided they meet the requirements identified in Section 3.5.4 of Attachment 4.1.

Vendors will only be provided with this opportunity once, and only if the originally named individual is unavailable to respond (i.e. the Vendor 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 five (5) working days will not be extended to provide additional time for the new contact to respond.

g) Canada will not evaluate answers from two different customer reference contacts. Therefore if a reference is provided from both the primary and the back-up contacts respond to Canada, Canada will use the first set of answers received.

h) Wherever information provided by a reference differs from the information supplied by the Vendor, the information supplied by the reference will be the information evaluated.

i) A Resource will not meet the mandatory requirement if:

j) The customer reference states he or she is unable or unwilling to provide the information requested; or

2.7 The Vendor may provide the questions to the customer reference contact person in advance.

2.8 In order for the resource to be deemed compliant the customer reference for the proposed Resource must provide a response that scores a pass mark for all five (5) questions listed in Section 2.6 (d) of Attachment 4.1. Any bid that has a customer reference that does not pass all five (5) questions each question will be declared non-compliant.

ALL OTHER TERMS AND CONDITION REMAIN THE SAME