

**Request for Proposal**  
**For**  
**ERP SYSTEMS INTEGRATOR**

**Request for Proposal No:** PPS-RFP-2021-077  
**Date of Issue:** August 23, 2021  
**Submission Deadline:** October 4, 2021

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## PART 1 – INTRODUCTION

### 1.1 **Invitation to Bidders**

This Request for Proposals (“the RFP”) issued by the Parliamentary Protective Service (PPS) is an invitation to submit non-binding offers for the provision of ERP Systems Integrator services as further described in Appendix D, for the prices established in Appendix C. The Bidder selected pursuant to this RFP process will be informed in writing. Bidders not selected will also be informed in writing.

### **Consortium or Joint Venture Proposals**

Responses submitted by a Bidder that consists of more than one legal entity or person (such as consortia or joint ventures) will be accepted with the understanding that PPS shall regard only one of the parties of the consortium or joint venture as the prime Supplier. Responses shall clearly indicate which party is the prime Supplier. The prime Supplier shall be solely accountable for all additional parties. PPS will enter into an agreement only with the prime supplier.

### 1.2 **Type of Agreement for Deliverables**

It is the Parliamentary Protective Service’s intention to enter into an agreement with one legal entity. The term of the agreement is to be for a period of five (5) years, with options in favour of the Parliamentary Protective Service to extend the agreement on the same terms and conditions for up to ten (10) one (1) year periods.

### 1.3 **No guarantee of Volume of Work or Exclusivity of Agreement**

The Parliamentary Protective Service makes no guarantee of the value or volume of work to be assigned to the successful Bidder. The agreement to be negotiated with the selected Bidder will not be an exclusive agreement for the provision of the described deliverables. The Parliamentary Protective Service may put in place an agreement with others for the same or similar deliverables to those described in the RFP or may obtain the same or similar deliverables internally. The Parliamentary Protective Service may award a separate agreement for Maintenance and Support Services.

### 1.4 **Submission Instructions**

1.4.1 Bidders must submit their response in accordance with the following timetable and instructions.

Issue Date of RFP	<b>August 23, 2021</b>
Deadline for Questions	<b>September 10 at 14:00 ET</b>
Submission Deadline	<b>October 4 at 14:00 ET</b>

The above timetable is a tentative schedule, and may be amended by the Parliamentary Protective Service at any time.

Bidders must submit their Submission Form (Appendix B) in the form prescribed herein by the Submission Deadline to the Parliamentary Protective Service Contact identified below in the manner set out below:

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## PART 1 – INTRODUCTION

- 1.4.2 Parliamentary Protective Service Contact:  
Wayne Dubeau, Senior Contracting Officer  
E-mail: [Proposals-soumissions@pps-spp.parl.gc.ca](mailto:Proposals-soumissions@pps-spp.parl.gc.ca)
- 1.4.3 Responses must be submitted electronically to the email address listed above.  
No hard copies will be accepted.
- 1.4.4 Bidders are solely responsible for the delivery of their responses in the manner and time prescribed. Responses received after the Submission Deadline will be rejected.
- 1.4.5 All responses must include the following mandatory forms:
- 1.4.5.1 Proposal Submission Form (Appendix B), completed in its entirety and signed by an authorized representative of the Bidder;
- 1.4.5.2 Pricing Structure Form (Appendix C), completed in accordance with the instructions contained within Appendix C, Pricing Structure Form.
- 1.4.5.3 Other than inserting the information requested on these mandatory forms, a Bidder may not make any changes to any of the forms.

### 1.5 **Communications During Solicitation Period**

- 1.5.1 Unless otherwise specified, all enquiries concerning this RFP must be received by email no later than 14:00:00 on September 10th, 2021 to the following PPS contact:  
Wayne Dubeau  
Procurement  
155 Queen Street, 4<sup>th</sup> Floor  
Ottawa ON K1A 0B8  
Email: [Proposals-soumissions@pps-spp.parl.gc.ca](mailto:Proposals-soumissions@pps-spp.parl.gc.ca)
- 1.5.2 All questions submitted by Bidders by email to the PPS Contracting Authority will be deemed to be received once the email has entered the PPS' email inbox. No such communications are to be directed to anyone other than the PPS Contracting Authority named above in clause 1.5.1. Questions received after the closing time may not be answered.
- 1.5.3 PPS is under no obligation to provide additional information, and PPS will not be responsible for any information provided by or obtained from any source other than the PPS Contracting Authority.
- 1.5.4 It is the responsibility of the Bidder to seek clarification from the PPS Contracting Authority prior to the time set out in clause 1.5.1 on any matter it considers to be unclear. PPS will not be responsible for any misunderstanding on the part of the Bidder concerning the RFP or the procurement process.

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## **PART 1 – INTRODUCTION**

### **1.6 Amendment and Withdrawal of Responses**

- 1.6.1 Bidders may amend their responses prior to the closing date of the RFP by submitting the amendment electronically to the PPS email address listed in 1.4.2. The amendment must contain the RFP title and number and the full legal name of the Bidder. Any such amendment should clearly indicate which part of the response the amendment is intended to replace.
- 1.6.2 At any time throughout the RFP process, a Bidder may withdraw a submitted response. To effect a withdrawal, a notice of withdrawal must be sent to the Parliamentary Protective Service Contact and must be signed by an authorized representative. The Parliamentary Protective Service is under no obligation to return withdrawn responses.

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## PART 2 – EVALUATION OF PROPOSALS

### 2.1 Evaluation of Responses

- 2.1.1 An Evaluation Team has been assembled to review the responses, assess their compliance against the selection and evaluation criteria of this RFP, and consider accepting the responses of one or more compliant Bidders. The criteria to be used by the Evaluation Team to assess and rate the responses are shown in Appendix E, Evaluation Criteria and Financial Evaluation. All aspects of the criteria should be thoroughly addressed by Bidders. Those Bidders responding with unqualified phrases such as "we comply", will not be rated as highly as those Bidders that described in some detail just how they comply.
- 2.1.2 While price is a factor in the selection of the successful Bidder(s), other criteria are weighted and will be evaluated accordingly.

### 2.2 STAGES OF EVALUATION

The evaluation of responses will be conducted in the following stages:

#### 2.2.1 **Stage I – Mandatory Criteria, Submission and Rectification**

##### Submission and Rectification Period

Stage I will consist of a review to determine which responses are complete and provide all required information to perform the subsequent stages of evaluation.

Only those Bidders whose responses meet the mandatory criteria, as described in Appendix E, Table 1 – Mandatory Criterion (Stage I), will proceed to Stage II.

Bidders who have submitted an incomplete response as of the Submission Deadline will be provided an opportunity to rectify any deficiencies related to completeness within the Rectification Period.

The Rectification Period will begin to run from the date and time that the Parliamentary Protective Service issues its rectification notice to a Bidder. During the Rectification Period, Bidders may not make changes to their responses, except to provide requested information necessary to complete the response.

At the end of the Rectification Period, responses which remain incomplete will be deemed non-compliant and excluded from further consideration. Responses that are deemed complete at the end of the Rectification Period will proceed to Stage II of the evaluation process.

#### 2.2.2 **Stage II – Evaluation of Rated Criteria**

Stage II will consist of a scoring on the basis of the Rated Criteria as set out in Appendix E. Based on the evaluation results of the rated criteria, the Parliamentary Protective Service reserves the right to invite up to the top 5 highest-ranked bidders to Stage III.

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## PART 2 – EVALUATION OF PROPOSALS

### 2.2.3 Stage III – Live Walkthrough of Proposed Plan, Approach and Methodology

Stage III will consist of a live walkthrough of the bidder's proposal, highlighting their proposed plan, approach and methodology as well as introducing key members of the bidder's proposed project team, including the proposed Project Manager. The walkthrough will be rated on the quality and clarity of the information provided. Successful Bidders from Stage III will be move on to Stage IV.

### 2.2.4 Stage IV - Evaluation of Financial Proposal

Finally, bidders invited to Stage IV will be evaluated on their financial proposals. The financial evaluation is worth a total of 30% of the overall evaluated score. The Bidders' financial evaluation will be combined with the scoring of all previous Stages to determine the top-ranked bidder.

Subject to the Terms of Reference and Governing Law, the top-ranked Bidder as established under the evaluation will be selected to enter into an agreement for the provision of the Deliverables. The selected Bidder will be expected to enter into an agreement within the timeframe specified in the selection notice. Failure to do so may, among other things, result in the disqualification of the Bidder and the selection of another Bidder, or the cancellation of the RFP.

## 2.3 Mandatory Requirements

### 2.2.1 Submission Form

Each response must include a Submission Form (Appendix B) completed and signed by the Bidder.

### 2.2.2 Pricing Form

Bidders must complete the Pricing Structure Form (Appendix C) and include with its response.

## 2.3 Rated Criteria

In addition to submitting the Proposal Submission Form, noted above, Bidders should respond to the non-price factors described in Appendix E.

## 2.4 Tie Score

In the event of a tie score, the selected Bidder will be the Bidder with the highest score on the rated criteria excluding price.

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## **PART 3 – TERMS AND CONDITIONS OF THE PROCUREMENT PROCESS**

### **3.1 BIDDERS TO FOLLOW INSTRUCTIONS**

Bidders should structure their responses in accordance with the instructions in the RFP. Where information is requested in the RFP, any response made in a proposal should reference the applicable clause numbers of the RFP where that request was made.

In the event of any discrepancies between the English and French versions of this RFP, the English version of the RFP document will prevail.

In the event of any discrepancies between the notice posted on Buy and Sell and this RFP document, the information in this RFP document will prevail.

### **3.2 COMMUNICATION OF RFP DOCUMENTS AND ADDENDA**

The Parliamentary Protective Service will only post RFP documents and any associated Addenda via email.

### **3.3 INFORMATION IN RFP AN ESTIMATE ONLY**

The Parliamentary Protective Service makes no representation, warranty or guarantee as to the accuracy of the information contained in this RFP or issued by way of addenda. Any quantities shown or data contained in the RFP or provided by way of addenda are estimates only and are for the sole purpose of indicating to Bidders the general size of the opportunity. It is the Bidder's responsibility to avail itself of all the necessary information to prepare a proposal in response to the RFP.

### **3.4 BIDDERS SHALL BEAR THEIR OWN COSTS**

Each Bidder shall bear all costs associated with or incurred in the preparation and presentation of its response, including, if applicable, costs incurred for acceptance testing or presentations.

### **3.5 COMMUNICATION AFTER ISSUANCE OF RFP**

#### **3.5.1 Bidders to Review RFP**

3.5.1.1 Bidders should promptly examine all of the documents comprising the RFP, and

- (a) report any errors, omissions or ambiguities; and
- (b) direct questions or seek additional information by email to the Parliamentary Protective Service Contact as set out in Part 1, clause 1.4.2.

3.5.1.2 The Parliamentary Protective Service is under no obligation to provide additional information, and the Parliamentary Protective Service is not responsible for any information provided by or obtained from any source other than the Parliamentary Protective Service Contact.

3.5.1.3 It is the responsibility of the Bidder to seek clarification from the Parliamentary Protective Service Contact on any matter it considers to be unclear. The Parliamentary Protective Service is not responsible for any

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## PART 3 – TERMS AND CONDITIONS OF THE PROCUREMENT PROCESS

misunderstanding on the part of the Bidder concerning the RFP or the procurement process.

### 3.5.2 All New Information to Bidders by Way of Addenda

3.5.2.1 The RFP may be amended only by an addendum in accordance with this clause. If the Parliamentary Protective Service, for any reason, determines that it is necessary to provide additional information relating to the RFP, such information will be communicated to all Bidders by addenda. Each addendum forms an integral part of the RFP.

3.5.2.2 Such addenda may contain important information, including significant changes to the RFP. Bidders are responsible for obtaining all addenda issued by the Parliamentary Protective Service. In the Proposal Submission Form (Appendix B), Bidders should confirm their receipt of all addenda by setting out the number of each addendum in the space provided.

### 3.5.3 Post-Deadline Addenda and Extension of Submission Deadline

If any addendum is issued after the Deadline for Issuing Addenda (if applicable), the Parliamentary Protective Service may at its discretion extend the Submission Deadline for a reasonable amount of time.

### 3.5.4 Verify, Clarify & Supplement

When evaluating responses, the Parliamentary Protective Service may request further information from the Bidder or third parties in order to verify, clarify or supplement the information provided in the Bidder's response. The Parliamentary Protective Service may revisit and re-evaluate the Bidder's response or ranking on the basis of any such information.

### 3.5.5 No Incorporation by Reference

The entire content of the Bidder's response should be submitted in a fixed form (PDF format).

The content of websites or other external documents referred to in the Bidder's response will not be considered to form part of its response. Bidders should include any reference material they wish to be considered for evaluation within their response. Any material or documents outside the response will not be considered. Should a Bidder wish to provide screen shots of its website for evaluation, copies or printouts of website material should be included within the response. URL links to the Bidder's website will not be considered by the Parliamentary Protective Service Evaluation Team.

### 3.5.6 Responses to be retained by the Parliamentary Protective Service

The Parliamentary Protective Service will not return the response or any accompanying documentation submitted by a Bidder.

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## PART 3 – TERMS AND CONDITIONS OF THE PROCUREMENT PROCESS

### 3.6 **NEGOTIATIONS, NOTIFICATION AND DEBRIEFING**

#### 3.6.1 **Selection of Highest-Ranked Bidder**

The highest-ranked Bidder, as established under Part 2, Evaluation of Responses, will receive a written invitation to enter into negotiations with the Parliamentary Protective Service.

#### 3.6.2 **Timeframe for Negotiations**

The Parliamentary Protective Service intends to conclude negotiations with the highest-ranked Bidder within **thirty (30) business days** commencing from the date the Parliamentary Protective Service invites the highest-ranked Bidder to enter negotiations. A Bidder invited to enter into negotiations should therefore be prepared to provide requested information in a timely fashion and to conduct its negotiations expeditiously.

#### 3.6.3 **Process Rules for Negotiation**

Any negotiations will be subject to the process rules contained in this Part 3, Terms and Conditions of the Procurement Process and Appendix B, Proposal Submission Form and will not constitute a legally binding offer to enter into an agreement on the part of the Parliamentary Protective Service or the Bidder. Negotiations may include requests by the Parliamentary Protective Service for supplementary information from the Bidder to verify, clarify or supplement the information provided in its response or to confirm the conclusions reached in the evaluation, and may include requests by the Parliamentary Protective Service for improved pricing from the Bidder.

#### 3.6.4 **Terms and Conditions**

The terms and conditions that will form any resulting agreement will be provided to the highest-ranked Bidder prior the commencement of the negotiation process, and will form the starting point for negotiation.

#### 3.6.5 **Failure to Enter Into Agreement**

Bidders should note that if the parties cannot execute an agreement within the allotted thirty (30) business days, the Parliamentary Protective Service may invite the next highest-ranked Bidder to enter into negotiations. In accordance with the process rules in this Part 3, Terms and Conditions of the Procurement Process and clause 2 of Appendix B, the Proposal Submission Form, there will be no legally binding relationship created with any Bidder prior to the execution of a written agreement. With a view to expediting agreement formalization, at the midway point of the above-noted timeframe, the Parliamentary Protective Service may elect to initiate concurrent negotiations with the next-highest-ranked Bidder. Once the above-noted timeframe lapses, the Parliamentary Protective Service may discontinue further negotiations with the highest-ranked Bidder. This process will continue until an agreement is formalized, until there are no more Bidders remaining that are eligible for negotiations or until the Parliamentary Protective Service elects to cancel the procurement process.

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## PART 3 – TERMS AND CONDITIONS OF THE PROCUREMENT PROCESS

### 3.6.6 Notification to Other Bidders

Other Bidders that become eligible for negotiations will be notified at the commencement of their respective negotiations. Once an agreement is executed between the Parliamentary Protective Service and a Bidder, the other Bidders may be notified directly in writing and/or will be notified by public posting in the same manner that the RFP was originally posted of the outcome of the procurement process and the award of the agreement.

### 3.6.7 Debriefing

Bidders may request a debriefing after receipt of a notification of award. All requests must be in writing to the Parliamentary Protective Service Contact and must be made within thirty (30) calendar days of notification of award. The intent of the debriefing information session is to aid the Bidder in presenting a better response in subsequent procurement opportunities. Any debriefing provided is not for the purpose of providing an opportunity to challenge the procurement process.

## 3.7 CONFLICT OF INTEREST AND PROHIBITED CONDUCT

### 3.7.1 Conflict of Interest

The Parliamentary Protective Service may disqualify a Bidder for any conduct, situation or circumstances, as solely determined by the Parliamentary Protective Service, that constitutes a Conflict of Interest. For the purposes of this clause, "Conflict of Interest" will have the meaning ascribed to it in clause 7 of the Proposal Submission Form (Appendix B).

### 3.7.2 Prohibited Bidder Communications

Bidders will not engage in any communications as described in clause 7.1.2 of the Proposal Submission Form (Appendix B). Bidders should also take note of the Conflict of Interest declaration set out in the Proposal Submission Form (Appendix B).

### 3.7.3 Bidder Not to Communicate with Media

Bidders may not at any time directly or indirectly communicate with the media in relation to the RFP or any agreement awarded pursuant to the RFP without first obtaining the written permission of the Parliamentary Protective Service Contact.

### 3.7.4 No Lobbying

Bidders may not in relation to the RFP or the evaluation and selection process in respect thereof, engage in any form of political or other lobbying whatsoever to influence the selection of the approved Bidder(s). Further, no Bidder or any person affiliated to a Bidder will attempt to communicate in relation to the RFP or a Bidder's response, directly or indirectly, with any director, officer, employee or other representative of the Parliamentary Protective Service, except as expressly directed or permitted by the RFP.

### 3.7.5 Illegal or Unethical Conduct

Bidders will not engage in any illegal bidding practices, including such activities as bid-rigging, price-fixing, bribery, fraud or collusion. Bidders will not engage in any unethical conduct, including lobbying or other inappropriate communications,

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## PART 3 – TERMS AND CONDITIONS OF THE PROCUREMENT PROCESS

offers of gifts to Parliamentary Protective Service employees, deceitfulness, submitting responses containing misrepresentations or other misleading or inaccurate information, or any other conduct that compromises or may be seen to compromise the procurement process.

### 3.7.6 Past Performance or Inappropriate Conduct

The Parliamentary Protective Service may prohibit a supplier from participating in a procurement process based on past performance or based on inappropriate conduct in a prior procurement process, and such inappropriate conduct includes but is not be limited to the following: (a) the submission of quotations containing misrepresentations or any other inaccurate, misleading or incomplete information; (b) the refusal of a supplier to honour its pricing or other commitments made in a response or bid; or (c) any other conduct, situation or circumstance, as solely determined by the Parliamentary Protective Service, that constitutes a Conflict of Interest. For the purposes of this clause, “Conflict of Interest” will have the meaning ascribed to it in the Proposal Submission Form (Appendix B).

## 3.8 CONFIDENTIAL INFORMATION

3.8.1 All information provided by or obtained from the Parliamentary Protective Service in any form in connection with the RFP either before or after the issuance of the RFP

3.8.1.1 is the sole property of the Parliamentary Protective Service and must be treated as confidential;

3.8.1.2 is not to be used for any purpose other than replying to the RFP and the execution of any subsequent agreement;

3.8.1.3 must not be disclosed without prior written authorization from the Parliamentary Protective Service; and

3.8.1.4 will be returned by the Bidders to the Parliamentary Protective Service immediately upon the request of the Parliamentary Protective Service.

### 3.8.2 Confidential Information of Bidder

Bidders should identify any information in their response or any accompanying documentation supplied in confidence for which confidentiality is to be maintained by the Parliamentary Protective Service. The confidentiality of such information will be maintained by the Parliamentary Protective Service, except as otherwise required by law or by order of a court or tribunal. Bidders are advised that their responses will, as necessary, be disclosed on a confidential basis, to the Parliamentary Protective Service’s advisors retained for the purpose of evaluating or participating in the evaluation of their responses. If a Bidder has any questions about the collection and use of information pursuant to the RFP, questions are to be submitted to the Parliamentary Protective Service Contact.

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## PART 3 – TERMS AND CONDITIONS OF THE PROCUREMENT PROCESS

### 3.9 PROCUREMENT PROCESS NON-BINDING

#### 3.9.1 **No Contract A and No Claims**

The procurement process is not intended to create and does not create a Contract A bidding process nor any contractual or other legally enforceable obligations. The procurement process is instead governed by the law applicable to direct commercial negotiations. For greater certainty and without limitation:

3.9.1.1 Neither the Bidder nor the Parliamentary Protective Service has the right to make any claims (in contract, tort, or otherwise) against the other with respect to the award of an agreement, failure to award an agreement or failure to honour a response to the RFP.

#### 3.9.2 **No agreement until execution of written agreement**

The procurement process is intended to identify prospective suppliers for the purposes of negotiating potential agreements. No legal relationship or obligation regarding the procurement of any good or service will be created between a Bidder and the Parliamentary Protective Service by the procurement process. An agreement will only exist following successful negotiation and execution of a written agreement for the acquisition of goods and/or services.

#### 3.9.3 **Non-binding price estimates**

While the pricing information provided with responses will be non-binding prior to the execution of a written agreement, such information will be assessed during the evaluation of responses and the ranking of the Bidders. Any inaccurate, misleading or incomplete information, including withdrawn or altered pricing, could have an adverse impact on any such evaluation, ranking or agreement award.

#### 3.9.4 **Disqualification for Misrepresentation**

The Parliamentary Protective Service may disqualify the Bidder or rescind an agreement subsequently entered into if the Bidder's response contains misrepresentations or any inaccurate, misleading or incomplete information.

#### 3.9.5 **References and Past Performance**

The Parliamentary Protective Service's evaluation may include information provided by the Bidder's references and may also consider the Bidder's past performance on previous agreements with the Parliamentary Protective Service.

#### 3.9.6 **Cancellation**

The Parliamentary Protective Service may cancel or amend this procurement process without liability at any time.

### 3.10 GOVERNING LAW AND INTERPRETATION

#### 3.10.1 **Governing Law**

The terms and conditions in this Part 3, Terms and Conditions of the Procurement Process are:

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**PART 3 – TERMS AND CONDITIONS OF THE PROCUREMENT PROCESS**

- 3.10.1.1 included for greater certainty and are intended to be interpreted broadly and separately (with no particular provision intended to limit the scope of any other provision);
- 3.10.1.2 non-exhaustive (and will not be construed as intending to limit the pre-existing rights of the parties to engage in pre-contractual discussions in accordance with the common law governing direct commercial negotiations); and
- 3.10.1.3 to be governed by and construed in accordance with the laws of the province of Ontario and the federal laws of Canada applicable therein.

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## A – FRAMEWORK AGREEMENT TERMS AND CONDITIONS

### 1. **GOVERNING LAWS AND JURISDICTION**

The Framework Agreement shall, for all purposes, be governed by and construed in accordance with the laws of the Province of Ontario. The Supplier irrevocably attorns to the exclusive jurisdiction of the courts of Ontario with respect to any matter arising under or related to this agreement and related purchase orders.

### 2. **PRIORITY OF DOCUMENTS**

The documents specified below form part of and are incorporated into the Framework Agreement. If there is a discrepancy between the wordings of any documents that appear on the list, the wording of the document that first appears shall prevail over the wording of any document that subsequently appears on the list.

- 2.1. Section A, Framework Agreement Terms and Conditions;
- 2.2. Section B, Statement of Requirements;
- 2.3. Section C, Pricing Structure;
- 2.4. Appendix A, Resulting Purchase Orders Terms and Conditions.

### 3. **TIME IS OF THE ESSENCE**

The work must be performed within or at the time stated in the Framework Agreement or any Purchase Order issued against the Framework Agreement.

### 4. **REQUIREMENT**

The Supplier shall use the methodology described in its proposal, provide the services required to meet the requirements set out in Section B, as specified in this Framework Agreement.

### 5. **STATUS OF CAPACITY**

The Supplier has represented and does hereby warrant that:

- 5.1 it has the personnel, experience, qualifications, equipment, facilities and all other skills and resources necessary to provide the goods and/or services to the Parliamentary Protective Service required herein and to do so in an efficient and timely manner, and
- 5.2 all goods and/or services provided under this agreement shall meet or exceed industry standards and shall be provided in accordance with applicable law.

### 6. **PERIOD OF FRAMEWORK AGREEMENT**

- 6.1 The Supplier will perform the tasks and provide the services outlined herein and any attached Schedules and/or Appendices, from the date of award for a period of five (5) years, in accordance with the Terms and Conditions listed herein.

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## **A – FRAMEWORK AGREEMENT TERMS AND CONDITIONS**

- 6.2 The Parliamentary Protective Service reserves the irrevocable option of extending this agreement under the same terms and conditions for an additional ten (10) one (1) year periods.
- 6.3 The last day of the term or any extension of the term of this agreement indicated on page one (1) shall be known as the expiry date. This is the last day that an order may be issued pursuant to this agreement. All such orders are to be honoured, notwithstanding that delivery will occur after the expiry date of the Framework Agreement. Delivery must be completed within thirty (30) days after the expiry date of this Framework Agreement. No order is to be issued pursuant to this Framework Agreement after the expiry date.

### **7. PRICE CERTIFICATION**

Negotiated prices will be firm for the period of the Framework Agreement. Any subsequent price increase must be submitted and justified in writing with a thirty (30) calendar days' notice and must be approved by the Parliamentary Protective Service' Contracting Authority.

### **8. LIMITATION OF EXPENDITURE**

No increase in the total liability of the Parliamentary Protective Service with regard to the price of the goods and/or services resulting from any design changes, modifications or interpretation of specifications, will be authorized or paid to the Supplier, unless such design changes, modifications or interpretations of specifications have been approved by the Parliamentary Protective Service' Contracting Authority in writing prior to their incorporation in the work.

### **9. TRAVEL EXPENSE PROVISION**

The cost of the travel, accommodation and meals incurred by the Supplier are for the Supplier's account and will not be paid by the Parliamentary Protective Service.

### **10. GOODS AND SERVICES TAX (GST) / HARMONIZED SALES TAX (HST)**

The GST or any other federal tax such as the HST is not included in the firm price. This tax, to the extent applicable, is to be shown separately on all invoices and will be paid by the Parliamentary Protective Service. The Supplier's federal tax registration number must appear on invoices when that federal tax is being charged. The Supplier agrees to bill and collect any applicable federal tax and to remit to the Canada Revenue Agency any federal tax received from the Parliamentary Protective Service.

### **11. PROVINCIAL SALES TAX (PST) IN PROVINCES OTHER THAN QUEBEC**

- 11.1 The Parliamentary Protective Service is PST exempt, but is subject to GST and HST as indicated in clause 10.
- 11.2 If a PST license number or a signed certificate of exemption is required, it will be provided upon request. The Parliamentary Protective Service recognizes the requirements set out in the legislation of the provinces where PST applies and, as

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## **A – FRAMEWORK AGREEMENT TERMS AND CONDITIONS**

such, all purchasing orders, purchase documents, acquisition card forms and agreements issued by the Parliamentary Protective Service will make reference to the appropriate PST licence number.

### **12. QUEBEC SALES TAX (QST)**

- 12.1 The Parliamentary Protective Service will pay the QST, if applicable.
- 12.2 The QST is not included in the firm price. This tax, to the extent applicable, is to be shown separately on all invoices. The Supplier agrees to invoice and collect from the Parliamentary Protective Service the QST and to further remit it to Revenue Quebec as required. The Supplier's QST registration number must appear on invoices when that tax is being charged.

### **13. PROVINCIAL ANCILLARY TAXES AND REGULATORY CHARGES**

- 13.1 For the purpose of this clause, an ancillary tax is a tax levied pursuant to a provincial statute other than the provincial retail sales tax legislation or its equivalent and the primary aspect of which is to raise revenue, whereas a regulatory charge is a charge introduced in a provincial legislative instrument other than in retail sales tax legislation or its equivalent and whose primary purpose is to finance a regulatory scheme.
- 13.2 The Parliamentary Protective Service is exempt from paying any ancillary taxes, but agrees to pay any applicable regulatory charge. In the event that a regulatory charge applies, it will not be included in the firm price.

### **14. ORDER FORM**

If the Parliamentary Protective Service wishes to acquire services pursuant to this Framework Agreement, the following terms and conditions will apply:

- 14.1 The Parliamentary Protective Service shall request services, using a Parliamentary Protective Service Purchase Order (PO).
- 14.2 It is understood and agreed that no contractual obligation exists until the Supplier's offer is accepted by the Parliamentary Protective Service in whole or in part by means of a PO. In addition, the liability of the Parliamentary Protective Service under this Framework Agreement shall be limited to the actual amount of services ordered under each PO and under no circumstances beyond the financial limitation specified herein unless otherwise agreed to between the parties and reflected with an amendment to this Framework Agreement or any resulting PO.
- 14.3 It is understood and agreed that the terms and conditions herein and as set out in as Appendix A, Terms and conditions for resulting Purchase Orders (as amended from time to time at the discretion of the Parliamentary Protective Service) shall apply to services covered by a PO.

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## A – FRAMEWORK AGREEMENT TERMS AND CONDITIONS

### 15. PRICING

For the successful provision of the goods and services detailed herein, the Supplier shall be paid according to the pricing schedule of this Framework Agreement. The prices are excluded of any PST, QST, GST and HST taxes and should include all applicable Canadian customs and excise taxes, and are FOB Destination.

### 16. METHOD OF PAYMENT

16.1 Subject to the approval of the appropriate authority of the Parliamentary Protective Service, payment by the Parliamentary Protective Service for goods and/or services will be made within thirty (30) days following the date on which goods and/or services have been received in accordance with the terms and conditions of the agreement or within thirty (30) days following the date on which an invoice has been received by the Parliamentary Protective Service Financial Management Operations, along with the substantiating documentation, whichever date is the later.

16.2 Final payment will not be made until all deliverables have been submitted and judged satisfactory by the Parliamentary Protective Service Project Authority.

16.3 All invoices must indicate the above Framework Agreement number and any applicable PO number and are to be submitted by email to [finance-finances@pps-spp.parl.gc.ca](mailto:finance-finances@pps-spp.parl.gc.ca) and/or to the PPS Project Authority named in Section 33.

### 17. CANCELLATION OF FRAMEWORK AGREEMENT

17.1 The Framework Agreement may be terminated at any time and for any reason by the Parliamentary Protective Service with a ten (10) working days written notice.

17.2 The Framework Agreement may be terminated in writing at the discretion of the Parliamentary Protective Service, without prior notice, if the Supplier is for any reason unable to provide the goods or services required under the Framework Agreement.

17.3 The Framework Agreement may be terminated at the discretion of the Parliamentary Protective Service if, during the term of the Framework Agreement all or any part of the property, goods or effects of the Supplier are at any time seized or taken in execution or by attachment or if the Supplier makes an unauthorized assignment or becomes bankrupt or insolvent.

17.4 Upon the termination of the Framework Agreement prior to the expiry date, the Supplier shall be entitled to be paid an amount that, by mutual agreement of both parties, is equal to the work performed by the Supplier for the Parliamentary Protective Service to the date of termination, less any amounts that have previously been paid to the Supplier and any expenses reasonably incurred.

17.5 In the event of termination, the Supplier must forthwith give to the Parliamentary Protective Service all completed work and work-in-progress, including all software,

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## **A – FRAMEWORK AGREEMENT TERMS AND CONDITIONS**

data, programs, systems documentation, research, reports, papers, materials and other information relating to the completed work and work-in-progress.

### **18. AMENDMENTS TO FRAMEWORK AGREEMENT**

No modification to the Framework Agreement shall be valid unless it is in writing and signed by each party hereto. All proposed changes to the agreement must be submitted to the Parliamentary Protective Service Contracting Authority identified in clause 34.

### **19. CONFIDENTIALITY**

19.1 All information relating to the affairs of the Parliamentary Protective Service or of its employees, to which the Supplier, or any officer or servant of the Supplier, becomes privy as a result of the work to be done under the agreement must be treated as confidential during and after the performance of the services.

19.2 Upon expiry or termination of the Framework Agreement, if requested by the Parliamentary Protective Service, the Supplier agrees to destroy all documentation and expunge all data received by the Supplier or any officer or servant of the Supplier from the Parliamentary Protective Service during the period of the Framework Agreement.

### **20. INDEPENDENT SUPPLIER**

It is the intention of the parties that the agreement is for the performance of services and/or the provision of goods and the Supplier is engaged as an independent Supplier providing goods and/or services to the Parliamentary Protective Service, and that neither the Supplier nor his/her employees, agents or representatives are engaged as Parliamentary Protective Service employees, and are not subject to the terms and conditions of employment applicable to Parliamentary Protective Service employees.

### **21. ASSIGNMENT OF FRAMEWORK AGREEMENT**

The Framework Agreement may not be assigned, sub-contracted or transferred in any manner by the Supplier without the prior written consent of the Parliamentary Protective Service' Contracting Authority and any assignment, subcontract, or transfer made without that consent is void and of no effect.

### **22. NO IMPLIED OBLIGATIONS**

No implied obligation of any kind by or on behalf of the Parliamentary Protective Service shall arise from anything in the Framework Agreement, and the express covenants and agreements herein contained and made by the Parliamentary Protective Service are and shall be the only covenants and agreements upon which any rights against the Parliamentary Protective Service are to be founded; and, without limiting the generality of the foregoing, the Framework Agreement supersedes all communications, negotiations and prior arrangements, either written or oral, relating to the work and made prior to the execution date of the Framework Agreement.

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**A – FRAMEWORK AGREEMENT TERMS AND CONDITIONS**

**23. PERFORMANCE**

The Supplier will report the performance under the Framework Agreement to the Parliamentary Protective Service in whatever format and frequency the Parliamentary Protective Service may require.

**24. CONFLICT OF INTEREST**

24.1 No employees of the Parliamentary Protective Service shall be admitted to any share or part of the Framework Agreement or to any benefit arising there from.

24.2 The Supplier must not extend entertainment, gifts, gratuities, discounts or special services regardless of value to Parliamentary Protective Service employees or their families. The Supplier has the responsibility to report to the Parliamentary Protective Service any attempts by Parliamentary Protective Service employees, their families, to obtain such favours.

**25. PUBLIC CEREMONY AND/OR ADVERTISING**

25.1 The Supplier must not allow or permit any public ceremony in connection with the Framework Agreement.

25.2 The Supplier must not erect or permit the erection of any sign or advertising without the Parliamentary Protective Services' prior written consent.

25.3 The Supplier agrees not to use the name of the Parliamentary Protective Service, or any reference to the Parliamentary Protective Service, in any manner of advertising.

**26. SECURITY REQUIREMENTS**

26.1 Where it is determined by the Parliamentary Protective Service that the Supplier or an employee of the Supplier will have access to Parliamentary Protective Service buildings, or to sensitive information or valuable assets, in the execution of this Framework Agreement, prior to the commencement of work the Parliamentary Protective Service may carry out a criminal records name check for any person who requires such access.

26.2 No criminal records check will be carried out without the consent of the person affected. Where consent is refused, the Parliamentary Protective Service reserves the right to determine that this person will not participate in any way in the execution of this Framework Agreement.

**27. PRIVILEGES OF PPS AND DAMAGES TO PREMISES**

27.1 Nothing in this Framework Agreement shall be construed as a modification or limitation of the privileges, immunities and powers of the Parliamentary Protective Service. The Parliamentary Protective Service retains at all times the control over the premises including access thereto.

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## **A – FRAMEWORK AGREEMENT TERMS AND CONDITIONS**

27.2 Where the performance of the work requires the presence of the Supplier's personnel on Parliamentary Protective Service premises, the Supplier must take the same care of the premises occupied as it would its own property and will be responsible for any damage to the Parliamentary Protective Service premises or equipment caused by the negligence of its officers, employees, representatives, or agents.

### **28. INDEMNIFICATION**

The Supplier hereby undertakes to save harmless and agrees to indemnify the Parliamentary Protective Service and its employees against any liability whatsoever (including any claims, demands, losses, damages, costs, charges and expenses) that is incurred by the Parliamentary Protective Service and its employees as a direct or indirect result of the conduct of the Supplier, its agents, employees, representatives, or anyone acting on its behalf in the performance of this Framework Agreement.

### **29. PROPRIETARY RIGHTS**

All software, data, programs, system documents, research, reports, papers, material and information owned by the Supplier and used in the performance of the services under this agreement are, and will remain, the property of the Supplier, unless otherwise agreed by both parties. All software, data, programs, system documents, research, reports, papers, material, information, trademarks, patents, copyrights and industrial designs arising out of the Supplier's performance of its obligations under this agreement and paid for by the Parliamentary Protective Service under this agreement are the property of the Parliamentary Protective Service and neither the Supplier nor any officer, employee, representative, or agent of the Supplier shall divulge, release, or publish anything related to performance under this Framework Agreement without first obtaining the written permission of the Parliamentary Protective Service's Project Authority.

### **30. LICENCES AND PERMITS**

The Supplier will be solely responsible for obtaining from the regulatory authorities under whose jurisdiction it operates and to which it is subject, all approvals, licences, certificates or other requirements connected with the subject matter of this Framework Agreement, including licences to use copyrighted software in the performance of the work. The Supplier must, upon request, provide copies of any documents evidencing such approval, licences, certificates or other requirements to the Parliamentary Protective Service's Project Authority.

### **31. ENVIRONMENTAL PRACTICES**

The Supplier shall maintain or exceed the environmental practices indicated in its offer for the duration of the Framework Agreement.

### **32. REPRESENTATION**

The Supplier and the Parliamentary Protective Service shall each appoint a representative to discuss any problems arising pursuant to the provisions contained in the Framework Agreement. The representative so appointed by the Parliamentary Protective Service

**A – FRAMEWORK AGREEMENT TERMS AND CONDITIONS**

shall be the Parliamentary Protective Service' Project Authority as referred to in this Framework Agreement.

**33. PARLIAMENTARY PROTECTIVE SERVICE AUTHORITIES**

The following individuals shall act as the Parliamentary Protective Service's respective authorities:

<b>Project Authority</b>	<b>Contracting Authority</b>
To be completed following agreement award.	<b>Jonathan Kealey</b> Manager, Procurement 155 Queen Street, suite 400 Ottawa, ON K1A 0B8 Tel: 613- 943-4063 Email: <a href="mailto:jonathan.kealey@pps-spp.parl.gc.ca">jonathan.kealey@pps-spp.parl.gc.ca</a>
<b>Enquiries (Primary Contact)</b>	
<b>Wayne Dubeau</b> Senior Contracting Officer 155 Queen Street, suite 400 Ottawa, ON K1A 0B8 Tel: 613-943-4062 Email: <a href="mailto:Wayne.Dubeau@pps-spp.parl.gc.ca">Wayne.Dubeau@pps-spp.parl.gc.ca</a>	

The preceding authorities may delegate their authority and act through their duly appointed representative.

**34. SUPPLIER REPRESENTATIVES**

The following individuals shall act as the Supplier's representatives:

<b>Contracting Signing Authority</b>	<b>Account Manager (Primary Contact)</b>
To be completed following Agreement Award.	To be completed following Agreement Award.
<b>Other</b>	
To be completed following Agreement Award.	

**35. NOTICE**

All notices to the Parliamentary Protective Service, including a change to the Supplier's coordinates, must be provided in writing to:

Parliamentary Protective Service  
Procurement  
155 Queen Street, #500  
Ottawa ON, K1A 0A6  
E-mail: [ppsc-aspp@parl.gc.ca](mailto:ppsc-aspp@parl.gc.ca)

**APPENDIX B – PROPOSAL SUBMISSION FORM**

**1. BIDDER INFORMATION**

Please fill out the following form, and name one person to be the contact for the proposal and for any clarifications or amendments that might be necessary.	
<b>Bidder Profile:</b>	
Full Legal Name of Bidder*:	
Any Other Relevant Name under Which the Bidder Carries on Business:	
Street Address:	
City, Province/State:	
Postal Code:	
Phone Number:	
Fax Number:	
Company Website (If Any):	
<b>RFP Point of Contact:</b>	
RFP Contact Person and Title:	
RFP Contact Phone:	
RFP Contact Facsimile:	
RFP Contact E-mail:	

\*In the case of a Consortium or Joint Venture, in addition to indicating who the prime supplier will be, Bidders must name the other parties that comprise the consortium or joint venture and their legal relationship. If Bidders plan to use subcontractors, the names of their subcontractors must be listed as well.

**2. ACKNOWLEDGMENT OF NON-BINDING PROCUREMENT PROCESS**

The Bidder acknowledges that this procurement process will be governed by the terms and conditions of the RFP, and that, among other things, such terms and conditions confirm that this procurement process is not intended to create and does not create a Contract A bidding process nor any contractual or other legally enforceable obligations, and that there will be no legal relationship or obligations created until the Parliamentary Protective Service and the selected Bidder have executed a written agreement.

**3. ABILITY TO PROVIDE DELIVERABLES**

The Bidder has carefully examined the RFP documents and has a clear and comprehensive knowledge of the deliverables required under the RFP. The Bidder represents and warrants its ability to provide the deliverables required under the RFP in accordance with the requirements of the RFP for the prices set out in the Appendix C - Pricing Structure Form. The Bidder has provided a list of any subcontractors to be used to complete the proposed agreement. The Bidder encloses herewith as part of the proposal the mandatory forms set out below:

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**APPENDIX B – PROPOSAL SUBMISSION FORM**

<b>FORM</b>	<b>INITIAL TO ACKNOWLEDGE</b>
<b>Proposal Submission Form</b>	
<b>Pricing Structure Form</b>	

Notice to Bidders: There may be forms required in the RFP other than those set out above. See the Mandatory Criteria section of the RFP for a complete listing of mandatory forms.

**4. NON-BINDING PRICE ESTIMATES**

The Bidder has submitted its prices in accordance with the instructions in the RFP and in the Pricing Structure Form set out in Appendix C. The Bidder confirms that the pricing information provided is accurate. The Bidder acknowledges that any inaccurate, misleading or incomplete information, including withdrawn or altered pricing, could adversely impact the acceptance of its proposal or its eligibility for future work.

**5. ADDENDA**

The Bidder has read and accepted all addenda issued by the Parliamentary Protective Service. The onus remains on Bidders to make any necessary amendments to their proposal based on the addenda. The Bidder confirms that it has received all addenda by listing the addenda numbers or, if no addenda were issued, by writing the word “None” on the following line:

\_\_\_\_\_.

**6. PROHIBITED CONDUCT**

The Bidder declares that it has not engaged in any conduct prohibited under clause 7 of Part 3 – Terms and Conditions of the Procurement Process, Conflict of Interest and Prohibited Conduct.

**7. CONFLICT OF INTEREST**

For the purposes of this clause, the term “Conflict of Interest” means:

- 7.1 in relation to the procurement process, the Bidder has an unfair advantage or engages in conduct, directly or indirectly, that may give it an unfair advantage, including but not limited to:
  - 7.1.1 having, or having access to, confidential information of the Parliamentary Protective Service in the preparation of its proposal that is not available to other Bidders;
  - 7.1.2 communicating with any person with a view to influencing preferred treatment in the RFP process (including but not limited to the lobbying of decision makers involved in the RFP process); or

**APPENDIX B – PROPOSAL SUBMISSION FORM**

- 7.1.3 engaging in conduct that compromises, or could be seen to compromise, the integrity of the RFP process; or
- 7.2 in relation to the performance of its contractual obligations contemplated in the agreement that is the subject of this procurement, the Bidder’s other commitments, relationships or financial interests:
  - 7.2.1 could, or could be seen to, exercise an improper influence over the objective, unbiased and impartial exercise of its independent judgement; or
  - 7.2.2 could, or could be seen to, compromise, impair or be incompatible with the effective performance of its contractual obligations.

If the box below is left blank, the Bidder will be deemed to declare that (a) there was no Conflict of Interest in preparing its proposal; and (b) there is no foreseeable Conflict of Interest in performing the contractual obligations contemplated in the RFP.

Otherwise, if the statement below applies, check the box.

- The Bidder declares that there is an actual or potential Conflict of Interest relating to the preparation of its proposal, and/or the Bidder foresees an actual or potential Conflict of Interest in performing the contractual obligations contemplated in the RFP.

If the Bidder declares an actual or potential Conflict of Interest by marking the box above, the Bidder must set out below details of the actual or potential Conflict of Interest:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The following individuals, as employees, advisors, or in any other capacity (a) participated in the preparation of our proposal; **AND** (b) were employees of the Parliamentary Protective Service and have ceased that employment within twenty-four (24) months prior to the Submission Deadline:

<b>Name of Individual:</b>
<b>Job Classification:</b>
<b>Service Area:</b>
<b>Last Date of Employment with the Parliamentary Protective Service:</b>
<b>Name of Last Supervisor:</b>
<b>Brief Description of Individual’s Job Functions:</b>
<b>Brief Description of Nature of Individual’s Participation in the Preparation of the Proposal:</b>

**(Repeat above for each identified individual)**

The Bidder agrees that, upon request, the Bidder will provide the Parliamentary Protective Service with additional information from each individual identified above in the form prescribed by the Parliamentary Protective Service.

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**APPENDIX B – PROPOSAL SUBMISSION FORM**

**8. DISCLOSURE OF INFORMATION**

The Bidder hereby agrees that any information provided in this proposal, even if it is identified as being supplied in confidence, may be disclosed where required by law or if required by order of a court or tribunal. The Bidder hereby consents to the disclosure, on a confidential basis, of this proposal by the Parliamentary Protective Service to the Parliamentary Protective Service's advisors retained for the purpose of evaluating or participating in the evaluation of this proposal.

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Signature of Witness

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Signature of Bidder Representative

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Name of Witness

---

Name and Title

Date:

I have authority to bind the Bidder and attest to the accuracy of the information provided in this proposal.

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**APPENDIX C – PRICING STRUCTURE FORM**

**UNDER SEPARATE COVER**

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## APPENDIX D – STATEMENT OF REQUIREMENTS

### 1. **PURPOSE**

The Parliamentary Protective Service (PPS) wishes to enter into a Framework agreement with an experienced systems integrator that will provide services for the implementation of the PPS Enterprise Resource Planning (ERP) solution based on Oracle Fusion Cloud ERP and Kronos Workforce Dimensions.

### 2. **BACKGROUND**

On June 23, 2015, the Parliamentary Protective Service was created by law under the Parliament of Canada Act. The Speaker of the Senate and the Speaker of the House of Commons are, as the custodians of the powers, privileges, rights and immunities of their respective Houses and of the members of those Houses, responsible for the Service. The newly created parliamentary entity amalgamated the former Senate Protective Service, House of Commons Security Services, and detection specialists, into a single unified security service to serve the Parliament of Canada. While the Director of the Service must be a member of the Royal Canadian Mounted Police (RCMP) by law, he or she has control and management of the daily operations of the organization.

The Director executes his or her mandate under the joint general policy direction of the Speaker of the Senate and the Speaker of the House of Commons. The Speakers of both Houses, being responsible for the Service, and the Minister of Public Safety and Emergency Preparedness have entered into an arrangement to have the RCMP lead the physical security operations of the Service.

Since its formation in 2015, PPS has leveraged multiple and disparate organizational support systems and services in use in partner organizations. These systems served the early needs of the PPS while it focused on developing its operational capabilities to provide protective and emergency services. The existing fragmented support system environment no longer meets the organization's current needs, and reliance on these systems constrains both its administrative and operational capabilities. Further development of the organization past its formative stage requires an ERP solution that supports PPS's strategic priorities and operating model.

In the past few months, PPS posted a request for proposal to acquire an ERP solution which resulted in the acquisition of Oracle/UKG Kronos as a SaaS solution.

### 3. **PROJECT SUMMARY**

The Service is looking for a systems integrator with a proven methodology and experience to lead and participate in the configuration and implementation of the Oracle/UKG Kronos solution in a phased approach. The Bidder will work on this project with a PPS team of subject matter experts and IT resources, the SaaS providers, and the IT infrastructure service provider.

It is the intention of the Service to leverage standard configurable functionality and to implement best practices for business processes, while avoiding customization to reduce the complexity of future system upgrades.

## APPENDIX D – STATEMENT OF REQUIREMENTS

PPS is seeking to implement Oracle and Kronos services and modules to support the following high-level business functions. It is expected that Kronos will be used for Scheduling, leave and exception time reporting for all PPS employee.

Department	Modules
<p><b>Human Resources</b></p>	<ul style="list-style-type: none"> <li>• Scheduling for Operational and Administrative Employees</li> <li>• Multiple Shifts, Rotational Cycles</li> <li>• Overtime Assignment</li> <li>• Scheduling Automated Notifications</li> <li>• Time Entry for Operational and Administrative Employees</li> <li>• Absence Management</li> <li>• Approval workflows</li> <li>• Allowance earnings and deductions (premiums, meals allowance, etc.)</li> <li>• Banks and Accruals</li> <li>• Job Classification</li> <li>• Position Management</li> <li>• Organizational Structure / Relationships</li> <li>• Benefits Administration</li> <li>• Labour Relations</li> <li>• Recruitment / Talent Management</li> <li>• Performance Management</li> <li>• Workforce Health and Safety</li> <li>• Payroll Gross Pay including Processing Simulation, Mass updates and Retroactive Pay</li> <li>• Learning Catalog and Assignment</li> <li>• Certification compliances</li> <li>• Learning Assignment rules and notifications around expiration and renewal</li> </ul>
<p><b>Finance</b></p>	<ul style="list-style-type: none"> <li>• Purchasing</li> <li>• Supplier Management</li> <li>• Procurement Contracts</li> <li>• General Ledger</li> <li>• Accounts Payable</li> <li>• Invoicing and Account Receivables</li> <li>• Cash Management</li> <li>• Travel and Expenses</li> <li>• Financial Forecasts</li> <li>• Salary Forecasts</li> <li>• Budgeting</li> <li>• Delegation Matrix</li> <li>• Commitments and Reconciliation</li> <li>• Monthly and Year End Accruals</li> <li>• Financial Analysis</li> <li>• Trial Balance</li> <li>• Financial Statements</li> </ul>

	<ul style="list-style-type: none"><li>• Asset Management</li><li>• Inventory Management</li></ul>
<b>Other</b>	<ul style="list-style-type: none"><li>• Bilingualism</li><li>• Key features available on Mobile</li><li>• Role-based access Management</li><li>• Audit Logs</li><li>• Interfaces to external systems</li><li>• Reports and Dashboard</li></ul>

#### **4. SCOPE OF WORK**

4.1 The Bidder will provide a project plan, a methodology and a project team with the expertise to execute project delivery. The following key activities and deliverables are in scope:

- Project Management
- Installation / Integration / Security Controls
- Business Analysis / Gap Analysis
- Solution Design including Interfaces
- Configuration / Release Management
- Participation for Data Extract from Legacy Sources, Transform and Load (tools and execution)
- Implementation
- Testing Strategy, Plan, Preparation and Execution
- Training Planning, Development and Delivery
- Change Management / Communication
- Knowledge Transfer
- Documentation (solution, business process, user, system)
- Transition and Post-Implementation Ongoing Maintenance and Support

4.2 The Bidder's Project Manager (PM) will work directly with the PPS Project Authority. The PM will manage all activities required for a successful project, including activities of the Bidder resources and sub-contractors, PPS resources, the SaaS providers and the infrastructure service provider, including cybersecurity responsibilities. Rigorous project planning and reporting is a key requirement for this engagement.

#### **5. PROJECT FACTS AND CONSIDERATIONS**

Through this RFP, the PPS is seeking proposals for a phased approach to implement this ERP project. The successful Bidder will provide advice and guidance on innovative approaches to implement successfully and meet requirements of the Service, while considering the following PPS operational and financial constraints / preferences / information.

## APPENDIX D – STATEMENT OF REQUIREMENTS

<b>Project Start Date</b>	March 1, 2022
<b>Location</b>	The Service operates primarily on the Parliamentary Precinct, as well as other locations in the vicinity of Ottawa.
<b>Operations</b>	The Service operates 24 hours a day, 7 days a week.
<b>Number of Employees</b>	The Service has approximately 650 employees – operational and administrative.
<b>Unions</b>	The project will need to consider business rules for two (2) collective agreements. Project planning may need to consider negotiations with the two employee associations.
<b>Finance Constraint</b>	Deployment of Finance needs to be done at the beginning of a fiscal year, April 1 <sup>st</sup> .
<b>Scheduling</b>	Scheduling is a key business process for the Service. The current system is outmoded and must be replaced.
<b>Payroll</b>	The Service calculates gross pay then transfers information to Phoenix for net pay, tax slips, benefits and pension management.
<b>Timeframe limitations</b>	The Service prefers to stay away from any major deployment in June/July due to operational requirements (particularly scheduling).

### 6. APPROVAL OF DELIVERABLES

The Service will identify a Project Authority to whom the systems integrator will report during the period of the project. The Project Authority will be responsible for coordinating the overall delivery of service, providing direction and guidance to the systems integrator, monitoring performance, accepting and approving deliverables. Should any deliverable fail to meet the requirements agreed upon in the Statement of Work, the Project Authority shall have the right to reject it or require its correction at the sole expense of the systems integrator before recommending payment.

The Project Authority will ensure that appropriate subject matter experts from within the Service are available to the systems integrator to discuss and provide content material as required.

### 7. LOCATION OF WORK AND TRAVEL

The systems integrator may be required to participate in meetings with the Service in Ottawa virtually or in person. Some work activities may be done off-site, but the majority will be done at PPS premises in Ottawa.

For onsite work, the PPS may provide the necessary workstation and access to conduct all work activities.

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## APPENDIX D – STATEMENT OF REQUIREMENTS

For offsite work, resources are required to be within the Eastern Canada time zone or at most +/- 3 hours.

Work arrangements must be approved by the PPS Project Authority throughout the duration of the agreement. Any travel costs and living expenses are the responsibility of the systems integrator and will not be reimbursed by the PPS.

### 8. **REPORTING AND COMMUNICATION**

Specific reporting requirements will be negotiated with the Supplier for the final agreement and may include, but are not limited to, any of the following:

- Timesheet reports;
- Invoicing reports;
- Status progress reports; updated project plan
- Outcomes/results report; and
- Other related reporting.

The Supplier shall provide detailed timesheets to the PPS Project Authority. Any required template will be approved by the PPS Project Authority.

At a minimum, the Supplier shall be responsible for facilitating and maintaining regular communication with the PPS Project Authority, or their designate, throughout the duration of the project. In addition, the Supplier shall immediately notify the PPS Project Authority of any issues, problems, or areas of concern in relation to any work as they arise.

### 9. **LANGUAGE OF WORK**

The Project Team must be able to communicate fluently in English and it would be considered an asset to have a working knowledge of conversational French. All documentation must be provided in English and some deliverables will be required to be in French. Training activities will be required to be delivered in English and in French.

### 10. **SECURITY REQUIREMENT**

10.1 The PPS will perform site access security clearance verification, as required, for Supplier resources working on-site at PPS premises.

10.2 The Supplier shall treat all information taken off-site as Confidential.

10.3 The Supplier must not distribute or remove any PPS information or assets from the work site(s) except where approved in writing by the PPS Project Authority. All information provided to and developed by the Supplier will remain the property of PPS.

### 11. **SUPPLIER RESPONSIBILITIES**

Throughout the course of the project, the Supplier agrees to:

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## APPENDIX D – STATEMENT OF REQUIREMENTS

- 11.1 Provide the resources named within their proposal. Named resources shall be available to provide support in the roles for which they are proposed. Any resource substitutions are subject to the provisions established in section 13, Resource Substitution and Transition, and are subject to the approval of the PPS Project Authority;
- 11.2 Complete tasks according to pre-defined schedules and standards, as outlined in the agreement;
- 11.3 Provide and manage a secure repository for project-related documentation shared by all project team members; and
- 11.4 As required, liaise with the PPS Project Authority and any key stakeholders identified by the PPS Project Authority for meetings, project reviews and other related project management support activities.

### 12. **PPS RESPONSIBILITIES AND SUPPORT**

As required in support of the Supplier's completion of work requirements, the Parliamentary Protective Service will provide:

- 12.1 Access, as required, to Parliamentary Protective Service facilities and/or the PPS Project Authority and/or PPS Project personnel for meetings, liaisons, consultations and for additional information;
- 12.2 Access to relevant documentation and reference materials to which the Supplier would not otherwise have access.
- 12.3 Access computer workstations and applicable software, as required, in conformance with the PPS' network security policy;
- 12.4 Review of deliverable submissions and the provision of comments and/or suggested revisions in a timely manner; and
- 12.5 Other assistance and support as required and deemed appropriate by the PPS.

### 13. **RESOURCE SUBSTITUTION AND TRANSITION**

- 13.1 The Supplier shall provide the services of the persons named within their proposal, unless the Supplier is unable to do so for reasons beyond its control.
- 13.2 During the course of the project, any changes to the proposed resources will require pre-approval by the PPS Project Authority.
- 13.3 The bidder will be responsible for all activities and effort related to onboarding and ramping up new resources.
- 13.4 If at any time the Supplier is unable to provide the services of any specific person named in their proposal, for reasons beyond its control, or if the PPS Project Authority requires the replacement of any individual, the Supplier shall provide a

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**APPENDIX D – STATEMENT OF REQUIREMENTS**

replacement with equal qualifications and experience, and final approval will be at the discretion of the PPS Project Authority.

13.5 The Supplier shall, prior to replacing any specific personnel, give notice to the PPS Project Authority of:

- the reason for the removal of the named person from the Work (if such removal was not requested by the PPS Project Authority); and
- the name, qualifications and experience of the proposed replacement resource.

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## APPENDIX E – EVALUATION CRITERIA AND COMPLIANCE MATRIX

### 1. EVALUATION CRITERIA COMPLIANCE

- 1.1 Each response will be evaluated separately, against the Evaluation Criteria contained herein.
- 1.2 It is the Bidder's responsibility to ensure that their response provides sufficient evidence for the PPS Evaluation Team to assess the compliance of the response with the criteria listed in this RFP.
- 1.3 Selection and evaluation is based on a "rules of evidence" approach, such that the Bidder's response is the sole demonstration of the Bidder's capacity to fulfill the requirement, as described within the RFP. No prior knowledge of or experience with the Bidder on the part of the PPS Evaluation Team will be taken into consideration.
- 1.4 Bidders must include any reference material they wish to be considered for evaluation within their response. Any material or documents outside the response will not be considered. Should a Bidder wish to provide screen shots of its website for evaluation, copies or printouts of website material should be included within the response. URL links to the Bidder's website will not be considered by the PPS Evaluation Team.
- 1.5 Responses will be evaluated in accordance with the following three (3) stages:
  - Stage 1** - Bidders will be evaluated on the basis of the Mandatory Criteria.
  - Stage 2** - Bidders who have met all of the Mandatory Criteria will be evaluated on the basis of the Rated Criteria.
  - Stage 3** - Bidders who have met the pass mark(s) on the Rated Criteria will be evaluated on the basis of their Financial Proposal.

### 2. COMPLIANCE MATRIX

Bidders are asked to complete the following Compliance Matrices below and Response Templates (Appendices B and C and Project Summaries, respectively) and submit with their response. The Criteria Compliance Matrices (below, Mandatory and Rated) will be used by the PPS Evaluation Team to find the required information in the Bidder's response. Bidders should include information on where within their response evidence can be found to support their compliance with each individual criterion.

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**E – EVALUATION CRITERIA AND COMPLIANCE MATRIX**

**3. FINANCIAL EVALUATION**

- 3.1 The Bidder’s Financial response is worth thirty (30%) of the overall point total.
- 3.2 Bidders must complete the Pricing Structure Form in Appendix C, Pricing Structure. Pricing will be scored based on a relative pricing formula using the methodology set out below in 3.3.
- 3.3 Each Bidder will receive a percentage of the total possible points allocated to price by dividing that Bidder’s total estimated price into the lowest bid total estimated price. For example, if a Bidder’s offered price is \$120.00 and that is the lowest bid price, that Bidder receives 100% of the possible points (120/120 = 100%). A Bidder who offers a price of \$150.00 receives 80% of the possible points (120/150 = 80%), and a Bidder who offers a price of \$240.00 receives 50% of the possible points (120/240 = 50%).

Lowest rate  
-----  
rate

x

Total available points = Score for offer with second-lowest

Second-lowest rate

  

Lowest rate  
-----  
rate

x

Total available points = Score for offer with third-lowest

Third-lowest rate

And so on, for each offer.

**APPENDIX E – EVALUATION CRITERIA AND COMPLIANCE MATRIX**

**TABLE 1 – MANDATORY CRITERIA (STAGE I)**

Bidders must meet the following Mandatory Criteria in order to be considered on the basis of the Rated Criteria. Proposals failing to meet the Mandatory Criteria will be deemed non-compliant and will not be considered further.

#	Description of Criterion	Bidder's Proposal Reference (compliance matrix)
<b>M1</b>	<p><b>Project Summaries</b></p> <p>The Bidder must provide three (3) written project summaries where it has led the configuration and implementation of a cloud Oracle and/or cloud Kronos solution on behalf of client organizations <u>during the past five (5) years</u>.</p> <p>The referenced projects must be ones that are in use in a production environment.</p> <p>Submitted Project Summaries will be evaluated in accordance with Rated Criterion Rx.</p>	
<b>M2</b>	<p><b>Certifications</b></p> <p><b><u>Oracle Fusion Cloud:</u></b></p> <p>PPS will consider only qualified Oracle Cloud system integrators (SIs) for this engagement. To qualify, SIs must possess the following Oracle Expertise, showing on the Oracle Partner Network (OPN): (*)</p> <ul style="list-style-type: none"> <li>- Oracle ERP Cloud Service Expertise</li> <li>- Oracle HCM Cloud Service Expertise</li> <li>- Oracle EPM Cloud Service Expertise</li> </ul> <p>For each of the above Oracle Cloud Applications, to show on OPN as holding the Oracle Expertise required to be proficient at implementing that application, an SI must meet the following qualifications (per application):</p> <ul style="list-style-type: none"> <li>• <b>Implementation Specialist:</b> At least 2 individuals that are Oracle certified (**) in the Cloud Application</li> <li>• <b>Cloud Solutions Architect:</b> At least 1 individual certified as a Cloud Solution Architect, either: <ul style="list-style-type: none"> <li><a href="#">Oracle Cloud Infrastructure 2020 Architect Associate</a> or</li> <li><a href="#">Oracle Cloud Infrastructure 2020 Certified Architect Professional</a></li> </ul> </li> <li>• <b>Project Manager:</b> At least 1 individual that is a certified project manager, certified with one or more of the following project management certifications: <ul style="list-style-type: none"> <li>○ PMI Project Management Professional (PMP);</li> </ul> </li> </ul>	

	<ul style="list-style-type: none"> <li>○ Certified Scrum Master (CSM);</li> <li>○ Prince2 Certified Practitioner;</li> </ul> <p style="text-align: center;"><b>OR</b></p> <ul style="list-style-type: none"> <li>○ Oracle Cloud Project Management Assessment.</li> </ul> <ul style="list-style-type: none"> <li>• <b>Support Specialist:</b> At least 1 individual certified as an Oracle Cloud Support Specialist (available through learning.oracle.com)</li> <li>• <b>Successful Go-Lives:</b> At least 2 successful implementation go-lives in the Cloud Application, each of the 2 validated through a <a href="#">Customer Satisfaction Survey</a> of score 8 or higher.</li> </ul> <p>(*) Oracle Partner Network (OPN) is found at Oracle.com/partnernetwork, under 'Partner Finder' (partner-finder.oracle.com), under 'Cloud Service Providers', then 'Implementation Service Expertise'.</p> <p>(**) The resource completed their Oracle Cloud certifications through in-person proctored and/or online proctored certification Oracle Cloud examinations (proctored by an independent 3<sup>rd</sup> party to Oracle).</p> <p><a href="https://education.oracle.com/certification">https://education.oracle.com/certification</a></p> <p><b><u>UKG Kronos:</u></b>          The Bidder must provide proof that it is certified implementer of UKG Kronos Workforce Dimensions by providing a copy of their Partner Reseller Agreement.</p>	
<p><b>M3</b></p>	<p><b>Proposed Project Team</b></p> <p>The Bidder must propose a project team and demonstrate the quality and level of expertise of their proposed project team. The Bidder must provide a project team structure for all phases of the project with named resources for the proposed first phase of the project, detailing required roles and time requirements for both the Bidder's resources and the PPS resources. The Bidder must provide a CV for each of the resources proposed to provide services to PPS for the first phase of the project.</p>	

**APPENDIX E – EVALUATION CRITERIA AND COMPLIANCE MATRIX**

**TABLE 2 – RATED CRITERIA (STAGE 2)**

Bidders who have met all of the Mandatory Criteria will be evaluated on the basis of the following Rated Criteria. Bidders must meet the respective pass marks on the Rated Criteria. Bidder who fail to meet any individual pass mark or the cumulative pass mark will be deemed non-compliant and will not be considered further.

#	Description of Criterion	Bidder's Proposal Reference (compliance matrix)
R1	<p><b>Corporate Profile</b></p> <p>The Bidder should provide the following company information and qualifications:</p> <ul style="list-style-type: none"> <li>a) Company name;</li> <li>b) Brief history of your company, including year founded, corporate structure, head office, main locations, and affiliated companies and their relationships;</li> <li>c) Indicate the number of clients for which you have provided similar services to those listed in this RFP;</li> <li>d) Indicate the number of Canadian public sector (Federal, including Crown Corporations and Agencies) clients you have;</li> <li>e) A short list of highlighted past and current clients of a relevant mandate; and</li> <li>f) Certifications with Oracle Cloud ERP and Kronos Workforce Dimensions</li> </ul>	
R2	<p><b>Project Summaries</b></p> <p>The three (3) Project Summaries submitted in response to Mandatory Criterion M1 will be evaluated on the basis of the extent to which they are similar and relevant to the PPS' requirements as described in the Statement of Work.</p> <p>Within each project summary provided, the Bidder should indicate:</p> <ul style="list-style-type: none"> <li>a) Name of the client organization to whom the system integration services were provided;</li> <li>b) The dates and duration of the work/project;</li> <li>c) \$-value of the project to the Bidder;</li> <li>d) Number of employees in client organization;</li> <li>e) If the solution was deployed on premise or in the cloud;</li> <li>f) The version of the key ERP solution components implemented;</li> <li>g) A description of the modules that were deployed (similar to PPS requirement);</li> </ul>	

	<ul style="list-style-type: none"> <li>a. Finance modules</li> <li>b. Human Resources modules</li> <li>c. Scheduling modules</li> <li>d. Other</li> </ul> <ul style="list-style-type: none"> <li>h) If the solution was configured for more than 1 collective bargaining agreement;</li> <li>i) A description of interfaces implemented between the ERP solution and other client solutions or services;</li> <li>j) The scope of service and types of deliverables that were completed by the Bidder;</li> <li>k) Size and composition of Bidder's implementation team;</li> <li>l) If ongoing maintenance and support services are or were provided and if so, the maintenance and support model used;</li> <li>m) A description of the training approach used and an excerpt from the training plan;</li> <li>n) A description of the change management / communication approach used;</li> <li>o) Results, extent to which it was deployed on time, on budget, met the expectations of the client; whether the solution was well adopted and if the organization is still using it today;</li> <li>p) Name, address, telephone number, email of the client project authority to whom the Bidder reported.</li> </ul> <p>The PPS reserves the right to contact the named client project authorities for the purpose of verifying the accuracy and veracity of the information provided in the Bidder's Proposal. Should the PPS choose to contact the project authorities and should one (1) or more named client project authorities provide a negative reference regarding the accuracy or veracity of the Bidder's proposal, the proposal may be deemed non-compliant and given no further consideration.</p> <p>Failure to provide all of the above information with respect to each cited project summary may result in the Bidder not being considered further.</p>	
<p><b>R3</b></p>	<p><b>Project Summary</b></p> <p>The Bidder should provide one (1) written project summary where it has led the configuration and implementation of an Oracle ERP solution on behalf of a client organization <u>during the past five (5) years</u> that included a successful integration with Kronos Workforce Dimensions.</p> <p>The referenced project should be one that is in use in a production environment.</p> <p>Within the project summary provided, the Bidder should indicate:</p>	

- a) Name of the client organization to whom the system integration services were provided;
- b) The dates and duration of the work/project;
- c) \$-value of the project to the Bidder;
- d) Number of employees in client organization;
- e) If the solution was deployed on premise or in the cloud;
- f) The version of the key ERP solution components and Scheduling tool implemented;
- g) A description of the modules that were deployed (similar to PPS requirement);
  - a. Finance modules
  - b. Human Resources modules
  - c. Scheduling modules
  - d. Other
- h) If the solution was configured for more than 1 collective bargaining agreement;
- i) A description of the extent of the integration between Oracle ERP solution and Kronos and the challenges that were faced for the integration during the implementation;
- j) The scope of service and types of deliverables that were completed by the Bidder;
- k) Size and composition of Bidder's implementation team;
- l) If ongoing maintenance and support services are or were provided for both the Oracle and Kronos and if so, the maintenance and support model used;
- m) A description of the training approach used and an excerpt from the training plan;
- n) A description of the change management / communication approach used;
- o) Results, extent to which it was deployed on time, on budget, met the expectations of the client; whether the solution was well adopted and if the organization is still using it today;
- p) Name, address, telephone number, email of the client project authority to whom the Bidder reported.

The PPS reserves the right to contact the named client project authorities for the purpose of verifying the accuracy and veracity of the information provided in the Bidder's Proposal. Should the PPS choose to contact the project authorities and should one (1) or more named client project authorities provide a negative reference regarding the accuracy or veracity of the

	<p>Bidder's proposal, the proposal may be deemed non-compliant and given no further consideration.</p> <p>Failure to provide all of the above information with respect to each cited project summary may result in the Bidder not being considered further.</p>	
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**APPENDIX E – EVALUATION CRITERIA AND COMPLIANCE MATRIX**

#	Description of Criterion	Bidder's Proposal Reference (compliance matrix)
R4	<p><b>Depth of Resources</b></p> <p>The Bidder should demonstrate it's access to a large pool of resources with expertise in ERP configuration and implementation, particularly resources with experience with Oracle and Kronos cloud solutions.</p> <p>In support of this criterion, the Bidder should provide:</p> <ul style="list-style-type: none"> <li>a) Approximate number of employees and sub-contractors with expertise in ERP configuration and implementation;</li> <li>b) Approximate number of employees and sub-contractors with Oracle Cloud ERP experience;</li> <li>c) Approximate number of employees and sub-contractors with Kronos Workforce Dimensions;</li> <li>d) For (b) and (c) above, specify % who are English-speaking and % who are bilingual (French and English);</li> <li>e) For (b) and (c) above, specify approximate number who are in Canada;</li> <li>f) For (b) and (c) above, specify approximate number who are in USA.</li> </ul>	
R5	<p><b>Project Team - Project Manager</b></p> <p>The Bidder's Project Team, submitted in response to Mandatory Criterion M4, will be evaluated on the extent of their demonstrated experience and qualifications in completing similar projects.</p> <p>In support of this criterion, the Bidder shall provide the following information on the Bidder's proposed Project Manager:</p> <ul style="list-style-type: none"> <li>a) Curriculum Vitae of the Project Manager, including history of relevant education, certifications and experience. CV should clearly outline the number of years of relevant experience in managing ERP implementation projects, similar in both scope and functionality to the project described in the Statement of Requirements. Bidders are asked not to exceed a Maximum of five (5) pages for the CV.</li> <li>b) The Bidder shall indicate whether the project manager is based in the Ottawa area or if not, how they will participate effectively in the project.</li> <li>c) The Project Manager should be able to communicate fluently in English and would be considered an asset to have a working knowledge of conversational French.</li> <li>d) The Bidder shall provide two (2) client references for whom similar services have been successfully provided and completed by the Project Manager within the past two (2) years from the RFP closing date. This shall include: company name, client contact name, contact title, contact telephone number, email address, services period, and brief description of services provided.</li> </ul>	

	<p>PPS reserves the right to contact these references.</p> <p>PPS reserves the right to conduct an interview with the proposed Project manager.</p>	
<b>R6</b>	<p><b>Project Team</b></p> <p>The Bidder's Project Team, submitted in response to Mandatory Criterion M4, will be evaluated on the extent of their demonstrated experience and qualifications in completing similar projects.</p> <p>In support of this criterion, the Bidder should provide details of key project personnel and demonstrate that their experience and qualifications are sufficient to successfully deliver on the project. The Bidder should provide the following:</p> <ol style="list-style-type: none"> <li>a) The Curriculum Vitae of each proposed resource (for the resources proposed in the first phase of the project), including history of relevant education, certifications and experience. CVs should clearly outline the number of years of relevant experience in working on ERP solution implementation projects, similar in both scope and functionality to the project described in the Statement of Requirements. Bidders are asked not to exceed a Maximum of five (5) pages for the CV.</li> <li>b) The Bidder shall indicate whether the proposed resources are based in the Ottawa area, and if they are not, how those resources will participate effectively in the project.</li> <li>c) The Project Team should be able to communicate fluently in English and would be considered an asset to have a working knowledge of conversational French.</li> <li>d) The Bidder shall also provide two (2) client references for each proposed resource for whom similar services have been done within the past two (2) years from the RFP closing date. This shall include: company name, client contact name, contact title, contact telephone number, email address, services period, and brief description of services provided.</li> </ol> <p>PPS reserves the right to contact these references.</p>	
<b>R7</b>	<p><b>Resources Required from PPS</b></p> <p>The Bidder should describe the resources required from PPS to ensure project success, including:</p> <ul style="list-style-type: none"> <li>• Role;</li> <li>• Skillset; and</li> <li>• Time percentage or estimated number of days.</li> </ul>	

**APPENDIX E – EVALUATION CRITERIA AND COMPLIANCE MATRIX**

#	Description of Criterion	Bidder's Proposal Reference (compliance matrix)
R8	<p><b>Implementation Plan, Approach and Methodology</b></p> <p>The Service is seeking a plan with options for a phased approach to implement the functionality described in Section 3 of the Statement of Requirements. The Bidder should indicate options based on the sequence of modules to be implemented (e.g. Finance, HR, Scheduling, options for all sequences, including associated timelines for each).</p> <p>The Bidder shall provide a project plan for implementation, highlighting the approach and methodology that the Bidder would take in performing the end-to-end configuration and implementation. The response should consider the project facts and considerations described within the Statement of Requirements.</p> <p>Bidders should demonstrate how the plan might be modified depending on which module the Service intends to implement first.</p> <p>The Bidders response should include as applicable:</p> <ul style="list-style-type: none"> <li>a) Project delivery approach and methodology</li> <li>b) High-level schedule and milestones for a phased approach, for example:           <div data-bbox="407 1131 1216 1409" style="margin-left: 20px;"> </div> </li> <li>c) Assumptions;</li> <li>d) Approach and plan for data migration;</li> <li>e) Testing approach;</li> <li>f) Approach for cutover and stabilization.</li> </ul> <p>The Bidder's proposed schedule and milestones should present reasonable and achievable timeframes considering their past experience, their resource availabilities and the points listed in section 6 of the Statement of Requirements.</p>	
#	Description of Criterion	Bidder's Proposal Reference (compliance matrix)

R9	<p><b>Covid-19 Contingency Plan</b></p> <p>The Bidder should provide an approach to address Covid-19 related work challenges, such as:</p> <ul style="list-style-type: none"> <li>a) How to organize a project kickoff;</li> <li>b) How to communicate effectively amongst team members;</li> <li>c) How to ensure a secure method and repository for sharing project-related documentation;</li> <li>d) How to maintain momentum and engagement of project team members;</li> <li>e) Describe any other Covid-19-related challenges experienced by the Bidder in other 2020/21 projects, and how they were mitigated.</li> </ul>	
#	Description of Criterion	Bidder's Proposal Reference (compliance matrix)
R10	<p><b>Training Planning, Development and Delivery</b></p> <p>The ERP program will require extensive training for various target groups. The systems integrator will have to perform training planning and scheduling, develop training materials and deliver training in English and in French during the project and after the last phase has been implemented.</p> <p>The Bidder is asked to describe the training services they offer, and recommend for the PPS ERP project, including but not limited to:</p> <ul style="list-style-type: none"> <li>a) Training planning and scheduling for various target groups;</li> <li>b) Training delivery methods (On site, Webinar, Etc.)</li> <li>c) Training materials produced/delivered for the project - English and/or French, written, video clips</li> <li>d) Delivery of training – during the project</li> <li>e) Training for new employees and refresher training after the last phase of the project; and</li> <li>f) Provide an excerpt of a training plan from a previous engagement</li> </ul> <p>Note: Due to PPS limited resources, a 'Train the trainer' approach is not the preferred approach.</p>	
#	Description of Criterion	Bidder's Proposal Reference (compliance matrix)
R11	<p><b>Knowledge Transfer to PPS Resources</b></p> <p>The intent of the knowledge transfer is to enable PPS' IT and subject matter expert employees to fully use, maintain and support the ERP solution.</p> <p>The Bidder should describe their approach for knowledge transfer to these employees. The Bidder should propose a strategy/plan that clearly demonstrates how these resources will be trained throughout the project, not just at the end.</p>	
#	Description of Criterion	Bidder's Proposal Reference (compliance matrix)

R12	<p><b>Change Management/Communication</b></p> <p>Change management (CM) is an important consideration for successful implementation, in terms of system changes and business process changes. The Bidder should:</p> <ul style="list-style-type: none"> <li>a) Describe their capabilities to lead and execute CM activities, either with their own resources or by partnering with a CM firm;</li> <li>b) Describe their approach to change management, their process, tools and techniques to manage the people side of change including changes to business processes; and</li> <li>c) Describe their communication and engagement strategy including, but not limited to, key milestones and techniques, the design and creation of communication materials as well as communications within the project team and with the user community.</li> </ul>	
#	Description of Criterion	Bidder's Proposal Reference (compliance matrix)
R13	<p><b>Cyber Security/ Architecture</b></p> <p>Cyber security controls, and securely connecting users to the cloud system are an important part of a project for a cloud-based solution. The Bidder should:</p> <ul style="list-style-type: none"> <li>a) Describe their capabilities to perform cyber security / architecture related activities, either with their own resources or by partnering with a specialized firm;</li> <li>b) Highlight key activities to be tracked during the project related to cyber security and implementation of a SaaS solution;</li> <li>c) Describe their approach to ensure appropriate cyber security controls have been implemented and tested during the project.</li> </ul>	
R14	<p><b>Data Access / Confidentiality</b></p> <p>The Bidder should provide a description of its processes and procedures to:</p> <ul style="list-style-type: none"> <li>a) Ensure that only Bidder's employees and sub-contractors with a legitimate business purpose and clearance will have access to PPS data and how these processes are enforced;</li> <li>b) Prevent any unintentional exposure of PPS information; and</li> <li>c) Ensure PPS data remains within the geographic boundaries of Canada, even if the Bidder's employees or contractors on the PPS account work remotely.</li> </ul>	
R15	<p><b>Maintenance and Support services</b></p> <p>The Service may require maintenance and support services for the Oracle/Kronos solution post project implementation. The Bidder is asked to describe their capabilities, processes and tools for providing such services.</p> <p>The response should address, at a minimum, the following information for Oracle Cloud ERP and Kronos Workforce Dimensions:</p> <ul style="list-style-type: none"> <li>a) Description of service and support for the following: <ul style="list-style-type: none"> <li>a. Testing and planning for software releases</li> <li>b. Interactions with SaaS provider</li> </ul> </li> </ul>	

	<ul style="list-style-type: none"><li>c. SaaS provider SLA management</li><li>d. Disaster recovery planning and testing</li><li>e. Spillage (data breach) handling</li><li>f. Exit planning (data migration)</li></ul> <ul style="list-style-type: none"><li>b) Support options, incident severity and priority definitions, response time;</li><li>c) Whether or not the support can be provided in English, French or both languages;</li><li>d) Hours of support;</li><li>e) Location of support center(s) that will handle PPS calls;</li><li>f) Security clearance, security controls and processes of support personnel;</li><li>g) Level of client (PPS) visibility into incident/request tracking;</li><li>h) Contact information and escalation process; and</li><li>i) Support model showing roles/responsibilities of supplier versus SaaS provider.</li></ul>	
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**APPENDIX F – PROJECT SUMMARY TEMPLATE**

<b>Project Reference #: _____</b>					
<b>a) Client:</b>					
<b>b) Project Start Date (dd/mm/yyyy)</b>			<b>Project End Date: (dd/mm/yyyy)</b>		
<b>c) Approximate Annual Dollar Value to the Bidder (\$CAD)</b>			<b>d) Number of employees in client organization</b>		
<b>e) On premise or Cloud implementation:</b>					
<b>f) The version of the key ERP solution components implemented:</b>					
<b>g) A description of the modules that were deployed (similar to PPS requirement):</b>					
<ul style="list-style-type: none"> <li>a. Finance modules</li> <li>b. Human Resources modules</li> <li>c. Scheduling modules</li> <li>d. Other</li> </ul>					
<b>h) Whether the solution was configured for more than 1 collective bargaining agreement:</b>					
<b>i) A description of interfaces implemented between the ERP solution and other client solutions or services:</b>					
<b>j) The scope of service and types of deliverables that were completed by the Bidder:</b>					
<b>k) Size and composition of Bidder's implementation team:</b>					
<b>l) Whether ongoing maintenance and support services are or were provided and if so, the maintenance and support model used:</b>					
<b>m) A description of the training approach used and an excerpt from the training plan:</b>					
<b>n) A description of the change management / communication approach used:</b>					
<b>o) Results, extent to which it was deployed on time, on budget, met the expectations of the client; whether the solution was well adopted and if the organization is still using it today:</b>					
<b>Original Approved Project Plan</b>			<b>Implementation Results</b>		
<b>Project Phases / Milestones</b>	<b>Planned Work Effort in weeks</b>	<b># Resources Planned</b>	<b>Scope Changes?</b>	<b>Effort Required in weeks</b>	<b># Resources Used</b>

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<b>Client Project Authority:</b>					
<b>Name:</b>					
<b>Address:</b>					
<b>Telephone Number:</b>					
<b>Email Address:</b>					