



RETURN RESPONSE TO :
RETOURNER LES SOUMISSION À:

Canada Revenue Agency
Agence du revenu du Canada

**INVITATION TO QUALIFY (ITQ) /
D'INVITATION À SE QUALIFIER (IQ)**

Title – Sujet	
CRA Digital Automated Accessibility Testing Solution (DAATS) Project	
ITQ No. – No de IQ	Date (yyyy-mm-dd) (aaaa-mm-jj)
1000417412	2022-12-21
ITQ closes – L'invitation prend fin on – le	Time zone – Fuseau horaire
2023-01-24	EST /HNE Eastern Standard Time/ Heure Normale de l'Est
at – à 2:00 P.M. / 14 h	
Contracting Authority – Autorité contractante	
Name – Nom : Mark S. Gordon	
E-mail address – Adresse de courriel – Mark.Gordon@cra-arc.gc.ca	
Telephone No. – No de téléphone (613) 863-4717	
Destination - Destination	
Not applicable – Pre-Qualification Process Only	
RESPONSES MUST BE SUBMITTED TO:	
Canada Revenue Agency	
Bid Receiving Unit	
BRUg@cra-arc.gc.ca	
ENQUIRIES:	
All enquiries regarding this ITQ must be submitted via e-mail to: Mark.Gordon@cra-arc.gc.ca	



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INVITATION TO QUALIFY (ITQ)

Conditional Set-aside under the Federal Government Procurement Strategy for Indigenous Business (PSIB)

This is an open Invitation to Qualify. However, it will be conditionally set-aside under the Government of Canada's Procurement Strategy for Indigenous Business (PSIB) if two or more responses have been received by Indigenous businesses who are certified under the Procurement Strategy for Indigenous Business (PSIB) criteria and who may be listed in the Government of Canada's Indigenous Business Directory (<https://www.sac-isc.gc.ca/eng/1100100033057/1610797769658>).

If your Indigenous business is not yet registered in the Indigenous Business Directory, please do so at the link provided above. If responses from two or more Indigenous businesses are compliant with the terms of the Invitation to Qualify the contracting authority will limit the competition to those Indigenous businesses and will not consider responses from any non-Indigenous businesses that may have been submitted.

If the responses from the Indigenous businesses are found to be non-compliant or non-responsive or are withdrawn, such that fewer than two compliant responses from Indigenous businesses remain, responses from all of the non-Indigenous businesses that had submitted responses will then be considered by the contracting authority.



Digital Automated Accessibility Testing Solution (DAATS). The “**Project**” for Canada Revenue Agency.

PART 1 GENERAL INFORMATION

1.1 Parts of the ITQ

This ITQ is divided into the following parts:

- **Part 1** General Information: provides a general description of the requirement.
- **Part 2** Procurement Process: provides an overview of the phases of the procurement process.
- **Part 3** Respondent Instructions: provides the instructions, clauses and conditions applicable to this ITQ.
- **Part 4** Response Preparation Instructions: provides suppliers with instructions on how to prepare their response.
- **Part 5** Security and Other Requirements; includes information on the security clearances that are required by the CRA at certain phases of the procurement process; and
- **Part 6** Evaluation Procedures and Basis of Qualification: indicates how the responses will be evaluated and the basis of qualification.

1.2 Introduction

1.2.1 Overview of the Project

The Canada Revenue Agency (CRA) has a requirement for a Digital Automated Accessibility Testing Solution (DAATS). The enterprise-wide digital solution will allow program areas to transition away from websites and applications that are inaccessible and do not meet accessibility conformance to digital environments that can be used by all including persons with disabilities and those using adaptive technologies. The DAATS will enhance existing digital and manual accessibility testing processes.

To fully implement and benefit from a digital solution the following business capabilities are required:

- automatically find, identify and help users prevent accessibility bugs or defects during the full development cycle of all digital properties including static and dynamic websites.
- The DAATS must also extract, store data and provide on-going monitoring.
- In addition to addressing the business requirements of the program areas, emphasis will be placed on ensuring that the DAATS will meet the CRA requirements for the overall management of information and the associated security and privacy elements.

1.2.2 Objective

a) The CRA seeks to establish a pool of suppliers who have experience in conducting and implementing a DAATS that will help users identify and remove accessibility defects and barriers on their digital environments. Suppliers will participate in a three-step procurement process for an enterprise-wide DAATS for the CRA, as described in Annex B Statement of Work.



Suppliers are invited to pre-qualify in accordance with the terms and conditions of this ITQ in order to become “Qualified Respondents” for any later phases of the procurement process. Only Qualified Respondents will be permitted to bid on any subsequent solicitation issued as part of the procurement process.

- b) . The CRA reserves the right to cancel any of the preliminary requirements included as part of the Project at any time during the ITQ phase or any other phase of the procurement process. Given that the ITQ process may be partially or completely cancelled by Canada, it may not result in any of the subsequent procurement processes described in this solicitation. Suppliers who submit a response can choose not to bid on any subsequent solicitation.
- c) The CRA is considering a **3-year contract plus 3 one-year optional periods**.
- d) The CRA anticipates the contract will include options for additional goods and services that cannot be defined at the time of contract award.



PART 2 PROCUREMENT PROCESS

2.1 Overview

A multi-phase collaborative procurement approach called Collaborative Procurement Solution (CPS) will be used for the CRA's Digital automated accessibility testing solution Project procurement process. This approach focuses on the engagement with industry in order to help define the requirements and the procurement approach. This approach will allow the CRA to perform due diligence with respect to the requirements with Qualified Respondents before issuing a bid solicitation.

The diagram below depicts the major phases of the CPS.



2.2 Invitation to Qualify Phase (ITQ)

- 2.2.1 The ITQ will be used to qualify Respondents who have the required experience in conducting and implementing a DAATS.
- 2.2.2 The Responses received under this ITQ will be evaluated against mandatory evaluation criteria as detailed in Part 6 – Evaluation Procedure and Basis for Qualification.
- 2.2.3 Respondents who meet all the mandatory criteria will be notified in writing by the Contracting Authority and proceed to the Review and Refine Requirements phase described below.
- 2.2.4 Once the pool of Qualified Respondents has been established, the CRA intends to proceed with the Review and Refine Requirements phase.

2.3 Review and Refine Requirements Phase (RRR)

- 2.3.1 The CRA will start the Review and Refine Requirements (RRR) phase by providing all Qualified Respondents with the detailed process to be followed for this phase.
- 2.3.2 The CRA has provided a preliminary Statement of Requirement (SOR), attached as Annex B. The CRA will seek feedback from the Qualified Respondents to clarify and refine the SOR further. The CRA may also seek feedback concerning other elements, such as recommendations on a pricing structure and bid evaluation criteria, for use in any potential RFP. These interactions could include:
 - a) one-on-one sessions.



- b) presentation sessions; and
- c) written questions and answers.

2.4 Request for Proposal (RFP) and Contract Award Phase

- 2.4.1 During the RFP and Contract Award phase, the CRA intends to issue a formal RFP to only the Qualified Respondents.
- 2.4.2 Prior to any contract award, the CRA intends to conduct a proof of proposal verification of the Top-ranked Bidder's proposal.
- 2.4.3 After completion of the RFP phase, the Top-ranked Bidder will be recommended for contract award.



PART 3 RESPONDENT INSTRUCTIONS

3.1 Standard Instructions, Clauses and Conditions

- 3.1.1 All instructions, clauses and conditions identified in the ITQ by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada (PWGSC). If there is a conflict between the provisions of this document and any documents that are incorporated into it by reference, this document prevails.
- 3.1.2 Suppliers who submit a response agree to be bound by the instructions, clauses and conditions of the ITQ.
- 3.1.3 The 2003 (2018-05-22) Standard Instructions - Goods or Services - Competitive Requirements are incorporated by reference into and form part of the ITQ, except that:
- a) Wherever the term “bid solicitation” is used, substitute “ITQ”.
 - b) Wherever the term “bid” is used, substitute “response”.
 - c) Wherever the term “bids” is used, substitute “responses”.
 - d) Wherever the term “Bidder” is used, substitute “Respondent”.
 - e) Wherever the term “Bidders” is used, substitute “Respondents”.
 - f) Wherever the term “solicitation” is used, substitute “ITQ”
 - g) **Section 01 (2016-04-04) Integrity Provisions– Bid** is deleted in its entirety and replaced with the following:

Section 01 (2016-04-04) Integrity provisions—response

1. The Supplier Integrity Directive (SID) dated May 24, 2016, is incorporated by reference into, and forms a binding part of the invitation to qualify. The Respondent must comply with the SID, which can be found on the Canada Revenue Agency’s website at <https://www.canada.ca/en/revenue-agency/corporate/about-canada-revenue-agency-cra/procurement-cra/supplier-integrity-directive.html>.
2. Under the SID, charges and convictions of certain offences against a Supplier, its affiliates or first tier subcontractors, and other circumstances, will or may result in a determination by Public Works and Government Services Canada (PWGSC) that the Supplier is ineligible to enter, or is suspended from entering into a contract with Canada. The list of ineligible and suspended Suppliers is contained in PWGSC’s Integrity Database. The SID describes how enquiries can be made regarding the ineligibility or suspension of Suppliers.
3. In addition to all other information required in the invitation to qualify, the Respondent must provide the following:
 - a. by the time stated in the SID, all information required by the SID described under the heading “Mandatory Provision of Information”; and



- b. with its response, a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first tier subcontractors that, to the best of its knowledge and belief, may be similar to one of the listed offences in the SID. The list of foreign criminal charges and convictions must be submitted using an Integrity Declaration Form, which can be found at Declaration form for procurement.
4. Subject to subsection 5, by submitting a response in response to this invitation to qualify, the Respondent certifies that:
- a. it has read and understands the SID (<https://www.canada.ca/en/revenue-agency/corporate/about-canada-revenue-agency-cra/procurement-cra/supplier-integrity-directive.html>)
 - b. it understands that certain domestic and foreign criminal charges and convictions, and other circumstances, as described in the SID, will or may result in a determination of ineligibility or suspension under the SID.
 - c. it is aware that Canada may request additional information, certifications, and validations from the Respondent or a third party for purposes of making a determination of ineligibility or suspension.
 - d. it has provided with its response a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first tier subcontractors that, to the best of its knowledge and belief, may be similar to one of the listed offences in the SID.
 - e. none of the domestic criminal offences, and other circumstances, described in the SID that will or may result in a determination of ineligibility or suspension, apply to it, its affiliates and its proposed first tier subcontractors; and
 - f. it is not aware of a determination of ineligibility or suspension issued by PWGSC that applies to it.
5. Where a Respondent is unable to provide any of the certifications required by subsection 4, it must submit with its response a completed Integrity Declaration Form, which can be found at Declaration form for procurement.
6. Canada will declare non-responsive any response in respect of which the information requested is incomplete or inaccurate, or in respect of which the information contained in a certification or declaration is found by Canada to be false or misleading in any respect. If Canada establishes after award of the Contract that the Respondent provided a false or misleading certification or declaration, Canada may terminate the Contract for default. Pursuant to the SID, Canada may also determine the Respondent to be ineligible for award of a contract for providing a false or misleading certification or declaration.
- h) **Section 02 (2012-03-02) Procurement Business Number** is deleted in its entirety.
- i) The content of **section 03 (2007-05-25) Standard Instructions, Clauses and Conditions**, is deleted in its entirety and replaced with: "The instructions, clauses and conditions identified in the invitation to qualify by number, date, and title are incorporated by reference into and form part of the invitation to qualify as though expressly set out in the invitation to qualify."



- j) **Section 04 (2007-11-30) Definition of Bidder** is deleted in its entirety and replaced with the following:

04 Definition of Respondent

"Respondent" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a Response to the invitation to qualify. It does not include the parent, subsidiaries or other affiliates of the Respondent, or its subcontractors.

- k) **Section 05 titled "Submission of bids"**

- a. paragraph 2 (d) is deleted in its entirety and replaced with the following:
 - i. (d) send its responses only to the Canada Revenue Agency Bid Receiving Unit or to the address specified in the solicitation in Section 2.3.
- b. paragraph 4, delete "60 days" and replace with "40 days".

- l) **Section 06 titled "Late bids"**, the reference to "PWGSC" is hereby deleted and replaced with "The CRA".

- m) **Section 07 titled "Delayed bids"**, all references to "PWGSC" are hereby deleted and replaced with "The CRA".

- n) **Section 08 titled "Transmission by facsimile or by Canada Post Corporation's (CPC) Connect service"** is deleted in its entirety and replaced with the following:

Section 08 Transmission by Connect

- a. Responses must be submitted by using the Connect service (<https://www.canadapost-postescanada.ca/cpc/en/business/postal-services/digital-mail/connect.page>) provided by the Canada Post Corporation.
- b. To submit a response using the Connect service, the Respondent must send as early as possible, at least six business days prior to the solicitation closing date and time, (in order to ensure a response), an email that includes the bid solicitation number to the Bid Receiving Unit requesting to open a Connect conversation. Requests to open a Connect conversation received after that time may not be answered. In the email, the Respondent must include the name and email address of all individuals who need to participate in the Connect conversation.
- c. If the Respondent sends an email requesting a Connect conversation to the specified Bid Receiving Unit in the bid solicitation, an officer of the Bid Receiving Unit will then initiate a Connect conversation. The Connect conversation will create an email notification from the Canada Post Corporation prompting the Respondent to access and action the message within the conversation. The Respondent will then be able to transmit its bid afterward at any time prior to the solicitation closing date and time.
- d. The ITQ number should be identified in the Connect message field of all electronic transfers.
- e. It should be noted that the use of Connect service requires a Canadian mailing address. Should a Respondent not have a Canadian mailing address, they may use 250 Albert St, Ottawa, ON K1A 1A2 in order to register for the Connect service.



- f. For responses transmitted by the Connect service, CRA will not be responsible for any failure attributable to the transmission or receipt of the bid including, but not limited to, the following:
- i. receipt of a garbled, corrupted or incomplete bid.
 - ii. availability or condition of the Connect service.
 - iii. incompatibility between the sending and receiving equipment.
 - iv. delay in transmission or receipt of the response.
 - v. failure of the Respondent to properly identify the bid.
 - vi. illegibility of the response.
 - vii. security of responses data; or,
 - viii. inability to create an electronic conversation through the Connect service.
- g. The Bid Receiving Unit will send an acknowledgement of the receipt of bid document(s) via the Connect conversation. This acknowledgement will confirm only the receipt of response document(s) and will not confirm if the attachments may be opened nor if the content is readable.
- h. Respondent must ensure that they are using the correct email address for the Bid Receiving Unit when requesting a conversation in Connect or communicating with the Bid Receiving Unit and should not rely on the accuracy of copying and pasting the email address into the Connect system.
- i. A bid transmitted by the Connect service constitutes the formal submission of the Respondent and must be submitted in accordance with section 05. Section 12 titled "Rejection of bid", delete subsections 1(a) and 1(b) in their entirety.
- o) **Section 20 titled Further information**, paragraph 2 is hereby deleted and replaced with the following: Enquiries concerning receipt of responses may be addressed to the Contracting Authority identified in the bid solicitation.
- p) **Section 21 titled Code of Conduct for Procurement-bid** is hereby deleted in its entirety.
- q) Submission of Proposals
- a. When responding, the response **MUST** be delivered to the Bid Receiving Unit address indicated below by the time and date indicated on Page 1.
 - i. RESPONDENTS ARE TO SUBMIT PROPOSALS TO:

Canada Revenue Agency
Bid Receiving Unit
BRUg@cra-arc.gc.ca
 - ii. Responses will not be accepted if emailed directly to this email address. This email address must be used to request that CRA open a Connect conversation, as detailed in Standard Instructions 2003. Responders must not use their own licensing agreement for Connect to initiate a Connect conversation with the CRA.



- iii. Respondents are hereby advised that the Bid Receiving Unit of the CRA is available Monday to Friday inclusive, between the hours of 0830 and 1500 EST or EDT, excluding those days that the federal government observes as a holiday.
 - iv. Due to the nature of this solicitation, electronic transmissions of a proposal by facsimile are not considered to be practical and therefore will not be accepted.
- r) At **section 05 (2018-05-22) Submission of bids**:
- a. subparagraph 2(d) is deleted and replaced with the following:
 - i. “d. sends its response only to the Canada Revenue Agency Bid Receiving Unit specified on page 1 of the invitation to qualify.”,
 - ii. subparagraph 2(f) is amended to delete “including all requested pricing details”,
 - iii. paragraph 4 is deleted.
 - s) The content of **section 06 (2018-05-22) Late Bids** is deleted in its entirety and replaced with: “The CRA will return responses delivered after the stipulated ITQ closing date and time, unless they qualify as a delayed response as described in section 07.”.
- t) At **section 07 (2018-05-22) Delayed Bids**:
- i. all references to “PWGSC” are deleted and replaced with “the CRA”,
 - ii. at paragraph 1, “before the contract award date” is deleted and replaced with “before the RRR phase”,
 - iii. subparagraph 1(b) is deleted.
- u) **Section 08 (2018-05-22) Transmission by facsimile or by epost Connect** is deleted in its entirety.
- v) At **section 11 (2007-11-30) Rights of Canada**, paragraphs (b), (c) and (g) are deleted in their entirety.
- w) At **section 12 (2014-09-25) Rejection of Bid**, subsections 1(a) and 1(b) are deleted in their entirety.
- x) **Section 14 (2007-11-30) Price justification** is deleted in its entirety.
- y) At **section 16 (2008-05-12) Conduct of evaluation**:
- i. at subparagraph 1(c), “before award of any contract” is deleted and replaced with: “before the RRR phase”,
 - ii. subparagraph (e) is deleted in its entirety.
- z) At **section 17 (2010-01-11) Joint venture**:
- i) at subparagraph 1(b), the word “Procurement” is deleted from the sentence,
 - ii) paragraph 3 is deleted in its entirety and replaced with: “The Response must be signed by all the members of the joint venture unless one member has been appointed to act on behalf of all members of the joint venture. The Contracting Authority may, at any time, require each member of the joint venture to confirm that the representative has been appointed with full authority to act as its representative for the purposes of the invitation to qualify.”



aa) **Section 20 (2017-04-27) Further Information** is deleted in its entirety.

bb) Section 21 (2016-04-04) Code of Conduct for Procurement-bid is deleted in its entirety.

3.2 Submission of Responses

3.2.1 Responses must be submitted to CRA by the date, time and address indicated on page 1 of the ITQ.

3.2.2 Responses delivered by email or transmitted by facsimile to CRA will not be accepted.

3.3 Enquiries during the ITQ Period

3.3.1 There are two question periods. All enquiries regarding the ITQ must be submitted in writing to the Contracting Authority within two periods identified below. Enquiries received after this period may not be answered.

3.3.2 Period 1: Enquiries should be submitted no later than January 6, 2023.

3.3.3 Period 2: Enquiries should be submitted no later than January 17, 2023.

3.3.4 Respondents should reference as accurately as possible the section and numbered item of the ITQ to which the enquiry relates. Care should be taken by Respondents to explain each question in sufficient detail in order to enable the CRA to provide an accurate answer.

3.3.5 Technical enquiries that are of a proprietary nature must be clearly marked “proprietary” at each relevant item. Items identified as proprietary will be treated as such except where the CRA determines that the enquiry is not of a proprietary nature. The CRA may edit the questions or may request that the Respondent do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all respondents. Enquiries not submitted in a form that can be distributed to all respondents may not be answered by the CRA.

3.4 Submission of Only One Response

3.4.1 A Respondent can be an individual, a sole proprietorship, a corporation, a partnership or a joint venture.

3.4.2 Each Respondent (including related entities) will only be permitted to qualify once. If a Respondent or any related entities participate in more than one response (participating means being part of the Respondent, not being a subcontractor), the CRA will provide those Respondents with 2 Federal Government Working Days (FGWDs) to identify the single response to be considered by the CRA. Failure to meet this deadline may result in all responses being disqualified or in the CRA discretion, decide which of the responses to evaluate.

3.4.3 A Federal Government Working Day (FGWD) is a calendar day, except for Saturday, Sunday and the following holidays: 1) New Year’s Day¹; 2) Good Friday and Easter Monday; 3) Victoria Day; 4) St-Jean Baptiste Day¹; 5) Canada Day¹; 6) 1st Monday in August; 7) Labour Day; 8) Thanksgiving Day; 9) Remembrance Day¹; 10) Christmas Day¹; and 11) Boxing Day². Notes: 1If this holiday occurs on a Saturday or Sunday, then the following Monday will be a holiday. 2If this holiday



occurs on a Saturday, then the following Monday will be a holiday. If this holiday occurs on a Sunday or Monday, then the following Tuesday will be a holiday.

- 3.4.4 For the purposes of this article, regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law (whether that entity is an individual, corporation, partnership, etc.) an entity will be considered to be “related” to a Respondent if:
- i. they are the same legal entity (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.).
 - ii. they are "related persons" or "affiliated persons" according to the Canada Income Tax Act.
 - iii. they have now or in the two years before the ITQ closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
 - iv. they otherwise do not deal with one another at arm's length, or each of them does not deal at arm's length with the same third party.
- 3.4.5 Despite the restriction set out above, a Respondent may act as a subcontractor to another Respondent.
- 3.4.6 Any individual, sole proprietorship, corporation, or partnership that is a Respondent as part of a joint venture cannot submit another response on its own or as part of another joint venture.
- 3.4.7 Example 1: Supplier A does not itself have all the experience required by the ITQ. However, Supplier B has the experience that Supplier A lacks. If Supplier A and Supplier B decide to team up to submit a response together as a joint venture, both entities are together considered the Respondent. Neither Supplier A nor Supplier B can team up with another supplier to submit a separate response, because each is already part of a Respondent.
- 3.4.8 Example 2: Supplier X is a Respondent. Supplier X's subsidiary, Supplier Y, decides to team up with Supplier Z to submit a response as a joint venture. Suppliers Y and Z, as well as Supplier X, will all be asked to determine which one of the two responses will be considered by Canada. Both responses cannot be submitted, because Supplier Y is related to Supplier X as an affiliate.
- 3.4.9 By submitting a response, the Respondent is certifying that it does not consider itself to be related to any other Respondent.
- 3.4.10 The Contracting Authority may still require that one or more of the entities constituting a bidder submit a certification or legal opinion regarding whether or not it is related to any other bidder and explaining why.

3.5 Language

Respondents should identify in the ITQ Submission Form (Annex A) which of Canada's two official languages it prefers for future communications with the CRA.



PART 4 RESPONSES PREPARATION INSTRUCTIONS

4.1 Response Preparation Instructions

- 4.1.1 Pricing is **not** a requirement of this ITQ and should not be included in the response.
- 4.1.2 The CRA requests that **no brochures and promotional materials** be included with the response.

4.2 Content of the Response

A complete ITQ response consists of the following documents:

- a) the ITQ Submission Form – Annex A; and
- b) Response to the evaluation criteria outlined in Annex C

4.3 ITQ Submission Form – Annex A

Respondents are requested to include the completed ITQ Submission Form (Annex A) with their response. The Form provides a common form in which Respondents can provide information required for evaluation. Using the form to provide this information is not mandatory, but it is recommended.



PART 5 SECURITY, FINANCIAL AND OTHER REQUIREMENT

5.1 Security Clearance Requirement

- 5.1.1 The CRA intends to include security requirements during the RFP Stage of the procurement process that the successful bidder will have to meet before the award of any contract.
- 5.1.2 For more information on personnel and organization security screening please visit PWGSC's Industrial Security Program (ISP) web site. Respondents can also contact CISD by telephone at 1-866-368-4646, or (613) 948-4176 in the National Capital Region.
- 5.1.3 The CRA will provide the RFP and contract security clauses at the RRR phase of this procurement process. The CRA reserves the right to revise the security requirements following the RRR phase.

5.2 Financial Capability

- 5.2.1 It is anticipated that PWGSC's SACC Manual clause A9033T (2012-07-16), Financial Capability, will apply to the resulting bid solicitation(s); except that:
 - a) subsection 3 may be deleted and replaced with the following: "If the Bidder is a subsidiary of another company, then any financial information required by the Contracting Authority in 1(a) to (f) must be provided by each level of parent company, up to and including the ultimate parent company. The financial information of a parent company does not satisfy the requirement for the provision of the financial information of the Bidder; however, if the CRA determines that the Bidder is not financially capable but the parent company is, or if the CRA is unable to perform a separate assessment of the Bidder's financial capability because its financial information has been combined with its parent's, the CRA may, in its sole discretion, award the Contract to the Bidder on the condition that the parent company grant a performance guarantee to Canada."; and
 - b) subsection 4 may be deleted.
- 5.2.2 In the case of a joint venture, each member of the joint venture would have to meet the financial capability requirements.
- 5.2.3 Financial capability will be evaluated during the Bid Solicitation Phase.



PART 6 EVALUATION PROCEDURES AND BASIS OF QUALIFICATION

6.1 General Evaluation Procedures

- 6.1.1 An evaluation team composed of representatives of the CRA will evaluate the ITQ Responses. The CRA may hire any independent consultant, or use any Government resources, to evaluate any ITQ Response. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.
- 6.1.2 Each Response will be reviewed to determine whether it meets the mandatory requirements of the ITQ as described in Annex C MANDATORY CRITERIA EVALUATION. Responses that do not comply with each and every mandatory requirement will be declared non-responsive and be disqualified.
- 6.1.3 In addition to any other time periods established in the ITQ:
- a) Requests for Clarifications: If the CRA seeks clarification or verification from the Respondent about its response, including certifications, the Respondent will have 2 FGWDs (or a longer period if specified in writing by the Contracting Authority) to provide the necessary information to the CRA. Failure to meet this deadline will result in the response being declared non-responsive.
 - b) Extension of Time: If additional time is required by the Respondent, an extension may be granted at the sole discretion of the Contracting Authority.

6.2 Project Reference Check Process

- 6.2.1 The CRA will contact the Primary reference or, when applicable, the Backup reference, in order to validate the accuracy of any information within the Project References. The CRA may conduct any Project Reference validation check in writing by e-mail by sending to the reference a copy of the Project Reference provided by the Respondent. The CRA will email (cc) the Respondent's contact when an e-mail is sent out for Project Reference validation checks.
- 6.2.2 The CRA must receive the reference's confirmation of the validity of the information within the Project References within 5 FGWDs from the date of the request by the Contracting Authority. If the CRA does not receive confirmation within 5 FGWDs from either the Primary or Backup reference that the information within the Project Reference is accurate (or that any inaccuracies are not material to whether or not the project meets the mandatory requirements), that Respondent's Project Reference will not be considered in the evaluation. The CRA may also contact a Primary or Backup reference for clarification purposes.
- 6.2.3 If during a Response validation by the CRA it becomes apparent that the address, telephone number, or email address for any of the references is incorrect or missing, the Respondent will be permitted to provide the correct address, telephone number, or email address within 1 FGWD of a request. If the named individual for the Primary reference is unavailable because they are on leave, or no longer working for that organization, the CRA will contact the Backup reference from the same customer organization.



6.3 Basis for Qualification

- 6.3.1 A Respondent whose response to the ITQ has been declared responsive will be a Qualified Respondent and proceed to the RRR phase. A formal notification by the Contracting Authority will be issued.
- 6.3.2 The CRA reserves the right to re-evaluate any aspect of the qualification of any Qualified Respondent at any time during the solicitation process. For example, if a particular security clearance is a requirement of this ITQ and the Respondent's security clearance changes or lapses, so that the Respondent no longer meets the requirements of this ITQ, Canada may disqualify that Qualified Respondent. Similarly, if new information comes to the attention of Canada that calls into question any of the Qualified Respondent's qualifications under this ITQ, Canada may re-evaluate that Qualified Respondent. If Canada re-evaluates the qualification of any Qualified Respondent, Canada may request further information and, if the Qualified Respondent fails to provide it within 5 working days (or a longer period provided by the Contracting Authority), Canada may disqualify the Qualified Respondent.
- 6.3.3 Unsuccessful Respondents will not be given another opportunity to participate or be re-evaluated for the subsequent phases of the procurement process, unless Canada determines in its sole discretion to conduct a second qualification round.
- 6.3.4 All Respondents will be notified in writing regarding whether or not they have qualified.



PART 7 CERTIFICATIONS

The following certifications are provided for informational purposes only. The CRA intends to include these certifications during the RFP Stage of the procurement process. These certifications are not required as a part of the Respondent's ITQ Response.

Certifications and Additional Information

Bidders will be required to provide the required certifications and associated information to be awarded a contract.

The certifications provided by bidders to Canada will be subject to verification by Canada at all times. Canada will declare a bid non-responsive or will declare a contractor in default in carrying out any of its obligations under the Contract, if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. The Contracting Authority will provide a timeframe for responding. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority may render the bid non-responsive or constitute a default under the Contract.

The Certifications listed at 7.1 will be required to be completed and submitted with the bid in the Request for Proposal (RFP) and Contract Award Phase. Failure to submit the Certifications listed at 7.1 in response to the RFP will render the bid non-responsive and the bid will receive no further consideration.

7.1 Certifications Required to Be Submitted at Time of Bid Closing

Joint Venture Certification

Only complete this certification if a joint venture is being proposed

The Bidder represents and warrants the following:

(a) The bidding entity is a joint venture in accordance with the following definition. A " joint venture" is an association of two or more parties who have entered into a written contract in which they have set out the terms under which they have agreed to combine their money, property, knowledge, skills, time or other resources in a joint business enterprise, sharing the profits and the losses and each having some degree of control over the enterprise.

(b) The name of the joint venture is: _____ (if applicable).

(c) The members of the contractual joint venture are (the Bidder is to add lines to accommodate the names of all members of the joint venture, as necessary):

(d) The Business Numbers (BN) of each member of the contractual joint venture are as follows (the Bidder is to add lines for additional BNs, as necessary):



- (e) The effective date of formation of the joint venture is: _____
- (f) Each member of the joint venture has appointed and granted full authority to _____ (the "Lead Member") to act on behalf of all members as its representative for the purposes of executing documentation relating to the solicitation and any resulting contract.
- (g) The joint venture is in effect as of the date of bid submission.

This Joint Venture Certification must be signed by each member of the joint venture.

The Joint Venture Certification shall be effective throughout the entire period of the Contract, including any exercised option period, if exercised.

The CRA has the right to request documentation from the Bidder evidencing the existence of the contractual joint venture.

Signature of an authorized representative of each member of the joint venture:

(The Bidder is to add signatory lines as necessary):

_____	_____	_____	_____
Signature of Duly Authorized Representative	Name of Individual (Please Print)	Legal Name of Business Entity	Date

_____	_____	_____	_____
Signature of Duly Authorized Representative	Name of Individual (Please Print)	Legal Name of Business Entity	Date

7.2 Certifications Precedent to Contract Award and Associated Information

The certifications listed below should be completed and submitted with the bid but may be submitted afterwards. If any of these required certifications is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to comply with the request of the Contracting Authority and to provide the certification within the time frame provided will render the bid nonresponsive and the bid will receive no further consideration.

7.3 Integrity Provisions – Associated Information

By submitting a bid, the Bidder certifies that the Bidder and its Affiliates are in compliance with the provisions as stated in Section 01 Integrity Provisions - Bid of the 2003 (2018-05-22) Standard Instructions. The associated information required within the Integrity Provisions will assist Canada in confirming that the certifications are true.



7.4 Employment Equity

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity list at [FCP Limited Eligibility to Bid](#).

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the list mentioned above at the time of contract award.

7.5 Former Public Servant

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny and reflect fairness in the spending of public funds. Bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required, have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

Definitions:

For the purposes of this clause, "former public servant" is any former employee of a department as defined in the [Financial Administration Act](#), R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

- a. an individual.
- b. an individual who has incorporated.
- c. a partnership made of former public servants; or
- d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"Lump sum payment" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"Pension" means, a pension or annual allowance paid under the [Public Service Superannuation Act](#) (PSSA), R.S., 1985, c.P-36, and any increases paid pursuant to the [Supplementary Retirement Benefits Act](#), R.S., 1985, c.S-24 as it affects the PSSA. It does not include pensions payable pursuant to the [Canadian Forces Superannuation Act](#), R.S., 1985, c.C-17, the [Defence Services Pension Continuation Act](#), 1970, c.D-3, the [Royal Canadian Mounted Police Pension Continuation Act](#), 1970, c.R-10, and the [Royal Canadian Mounted Police Superannuation Act](#), R.S., 1985, c.R-11, the [Members of Parliament Retiring Allowances Act](#), R.S., 1985, c.M-5, and that portion of pension payable to the [Canada Pension Plan](#), R.S., 1985, c.C-8.

7.6 Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder an FPS in receipt of a pension? **Yes** () **No** ()

If so, the Bidder must provide the following information, for all FPSs in receipt of a pension, as applicable:



- (a) name of former public servant; and
- (b) date of termination of employment or retirement from the Public Service.

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports.

7.7 Work Force Adjustment Directive

Is the Bidder an FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? Yes () No ()

If so, the Bidder must provide the following information:

- (a) name of former public servant.
- (b) conditions of the lump sum payment incentive.
- (c) date of termination of employment.
- (d) amount of lump sum payment.
- (e) rate of pay on which lump sum payment is based.
- (f) period of lump sum payment including start date, end date and number of weeks.
- (g) number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to an FPS who received a lump sum payment is \$5,000, including Applicable Taxes.

7.8 Vendor Reporting Information

The following information should be provided to enable CRA compliance with paragraph 221(1)(d) of the Income Tax Act, R.S.C. 1985, c.1 (5th Supp.) and report payments made to contractors under applicable services contracts (including contracts involving a mix of goods and services) on a T1204 Government Service Contract Payments slip.

For the purpose of this clause:

“Legal Name” means the name of the company, corporation or other entity constituted as a legal person under which this person exercises its rights and performs its obligations.

“Operating Name” means the name that is legally protected and used in the course of its business by a company, corporation or other entity legally constituted as a legal person, or by the individual.

The Bidder is requested to provide the following:

Legal Name: _____

Operating Name: _____



Address: _____

Payment/T1204 Address (if different) Payment address is same as above

City: _____

Province: _____

Postal Code: _____

Telephone: _____

Fax: _____

Type of Business (Select only one)

- Corporation
- Partnership
- Sole Proprietor
- Non-Profit Organization
- US or International Co.

All registered companies (excluding Non-Profit organizations and US or International companies) must provide their Goods and Services Tax (GST) or Business Number (BN). Additional details on how to obtain a BN can be found at: <http://www.cra-arc.gc.ca/tx/bsnss/tpcs/bn-ne/menu-eng.html>.

If the services will be rendered by an individual, please provide the Social Insurance Number (SIN). If a SIN number is being provided, the information should be place in a sealed envelope marked "Protected".

Goods and Services Tax (GST) Number: _____

Business Number (BN): _____

Social Insurance Number (SIN): _____

N/A Reason: _____

Note: If you select "N/A", then you must give a reason.

Date: _____

Name: _____

UNCLASSIFIED



Canada Revenue
Agency

Agence du revenu du
Canada

Invitation to Qualify # 1000417412

Signature: _____

(Signature of duly authorized representative of business)

Title: _____

(Title of duly authorized representative of business)

**ANNEX A: ITQ SUBMISSION FORM**

Respondent full legal name. For joint venture: the legal names of all the companies	
Authorized Representative of Respondent for evaluation purposes (e.g., clarifications)	Name: Title: Address: Telephone #: Email:
Canada's Official Language in which the Respondent will communicate with CRA during any subsequent process - indicate either English or French	
Applicable Laws (the Respondent may insert the Canadian province or territory of its choice; otherwise, the laws of Ontario will apply)	
<p>As the authorized representative of the Respondent, by signing below, I confirm that I have read and understood the entire ITQ including the documents incorporated by reference into the ITQ and the entire Response, and I certify that:</p> <p>1. All the information provided in the ITQ Response is complete, true and accurate.</p> <p>2. The Respondent agrees to be bound by all the terms and conditions of this ITQ, including the documents incorporated by reference into it.</p> <p>-----</p> <p>Signature of the authorized representative of the Respondent</p>	Name: Address: Email: Phone:

**ANNEX B: STATEMENT OF REQUIREMENTS (SOR)**

This is a preliminary SOR that outlines the requirement's scope and deliverables and provides a high-level overview of the project.

The final SOR will be prepared collaboratively with the successful Respondent(s) at the RRR stage.

1. Promoting Accessibility at the CRA

The [Accessible Canada Act](#), having received Royal Assent in June 2019, is intended to enhance the full and equal participation of all persons, especially persons with disabilities, in society. This is to be achieved through the progressive realization, within the purview of matters coming within the legislative authority of Parliament, of a Canada without barriers, particularly by the identification, removal and prevention of barriers.

The CRA has a role in implementing the Government of Canada's vision for an accessible Canada and is engaged in the implementation of goods and services that support the delivery of programs and services covered by the [Accessible Canada Act](#).

The CRA is committed to providing leadership to deliver and implement accessible goods and services and supporting the goal of inclusive by design, accessible by default. As it is intended that this initiative take place progressively, we should anticipate that, over time, the accessibility requirements in Canada's accessible products and services contracts will evolve and may become more demanding.

To accomplish this, the CRA is transforming and modernizing its approach to accessibility testing and has adopted the [EN 301 549 V3.2.1 \(2021-03\) Accessibility Standard](#) for all Information and Communication Technology products and services.



2. Terms and Definitions

Term	Definition
Access Permissions	The provision or withholding of access for Participants to a given initiative, based on the particular role or group assigned to that Participant. By default, all engagement initiatives must be open to all Engagement Participants.
Activity	An intentional effort by the Agency to engage in dialogue with a given internal or external audience on an individual or range of topics related to CRA programs and services over a specified period of time and through certain media.
Adaptive Technologies	Any "product, device, or equipment, whether acquired commercially, modified or customized, that is used to maintain, increase, or improve the functional capabilities of individuals with disabilities.
Automated Accessibility Testing	Automated accessibility testing tools will scan website's code to find common accessibility errors and flag potential issues that can create barriers for persons with disabilities or those using adaptive technologies.
Business Day	Monday to Friday, excluding any Canadian federal statutory holidays.
Business Hours	6:00 AM to 8:00 PM, Eastern Time, Monday to Friday
Digital environment	Consists of all the ICT available in the CRA environment (either internally or externally). This includes hardware, software and network facilities as well as mobile technologies, the Internet and the CRA's Intranet.
Case Management System	A system which permits engagement managers to create tickets particular to individual Participants and elevate issues to other program areas of responsible staff members within CRA.
Content	Content refers to participant responses and submissions and any data or information that is generated, used, or uploaded into the solution or Platform by CRA Users (e.g., Tickets, resources, templates, contact lists, images, videos)
CRA User(s)	Individual(s) accessing the accessibility solution or platform on behalf of the Canada Revenue Agency, usually a member of the Agency's staff. CRA Users must have different levels of access as defined in Section 5.0.
Dynamic websites	A dynamic website contains information and content that changes, depending on factors such as the viewer of the site, the time of the day, the time zone, or the native language of the country the viewer).
EN 301 549 v2.1.2 (2018-08) - ETSI	An accessibility standard from the European Nations that covers all ICT (Information and Communication Technology). This includes digital product such as cell phones, printers, ATMs, electronic documents, software, web content etc. The EN 301,549



	apply to public services and also includes procurement language to ensure no new barriers are introduced.
Manual accessibility Testing	A process in which testing is conducted by hand to check for accessibility issues that could create barriers for persons with disabilities or those using adaptive tools.
Mobile Device Friendly	The ease of use, navigability, and overall performance of an electronic platform on mobile devices and smart phones. The engagement platform's interface must be functional across devices and must not have any formatting or display issues when accessed on a mobile device and smart phone.
Offensive Language	Words or phrases in either English or French commonly associated with a suggestive, vulgar, inflammatory, or discriminatory connotation.
Private (invite-only) Discussion Forum	A web page which allows only a specified pool of authorized or invited users to submit comments and reply to other users on a given topic.
Public Discussion Forum	A web page which allows all registered or unregistered users to submit comments visible to other users on a given topic and reply to comments published by other users.
Reliability	Host servers with no less than 0.5% downtime (99.5% uptime) outside of regularly scheduled or urgent maintenance activities.
Technical documentation	A wide range of documents that ultimately provide end-users with information about a product and help users learn how to use it. A few common examples include user guides, tutorials, installation manuals, troubleshooting manuals, FAQs, knowledge bases, wikis & other learning resources.
Use Case	A use case is a written description of how users will perform tasks on your website. It outlines, from a user's point of view, a system's behavior as it responds to a request. Each use case is represented as a sequence of simple steps, beginning with a user's goal and ending when that goal is fulfilled.
VPAT (trademark)	A document that explains how information and communication technology (ICT) products such as software, hardware, electronic content, and support documentation meet (conform to) the Revised 508 Standards for IT accessibility.
WCAG	Web Content Accessibility Guidelines were published by the G3-Web Accessibility Initiative (WAI) ICT group to provide recommendations for making Web content more accessible by all users regardless of their disabilities.



3. Scope and objective

The Canada Revenue Agency (CRA) is seeking an enterprise-wide digital automated accessibility testing solution (DAATS) to address, identify and remove accessibility issues on all their internal and external digital environments.

The sought-out enterprise-wide managed digital solution will allow program areas to proactively inject accessibility development best practices at the onset of all new digital projects and will guide users as they remediate legacy accessibility issues. The sought-out solution will help CRA to transition away from one-off and manual testing requests for websites, dynamic web applications and digital environments that are inaccessible and do not meet accessibility conformance to a structured, managed and automated solution. Through real-time guidance, the solution will help build confidence, skills and capacity within CRA development and testing communities to ensure that Digital environments can be used by all including persons with disabilities and those using adaptive technologies.

4. Current State

Today the CRA Information Technology Branch (ITB) is responsible to ensure that all digital websites and environments meet accessibility standards and are usable by all. While efforts to meet universal standards such as the [EN 301 549 V3.2.1 \(2021-03\) Accessibility Standard](#) has been undertaken to some degree, there is inconsistency in the way the standards are applied and tested for. The CRA currently has –

- more than ten (10) thousands of external facing webpages with approximately 200 two hundred (200) dynamic web applications,
- more than fifty (50) thousand internal facing of which more than one thousand (1,000) are complex dynamic applications) and additional
- sixteen (16) thousand digital elements that must be assessed and evaluated for conformance and remediation.

At this time, an initial one (1) thousand external static webpages have been automatically tested, which revealed that automated conformance sits at fifty-two percent (52%) on those most critical externals facing static webpages. The tools currently used take several hours to scan a website and is not updated with current standards. It is important to note that when using automated testing alone, only 25 to 50% of accessibility defects are being captured through the use of this tool. To date, only twenty (20) percent of dynamic complex internal application and environments have been assessed using semi-automated and manual techniques and there is still much more to do.

While the CRA accessibility testing teams are well versed and experienced in accessibility testing using a plurality of both manual and semi-automated testing tools and techniques, conducting both automated testing and manual testing and subsequently issuing findings reports for their users and clients is very time consuming and intensive.



As a result, CRA is seeking to implement and equip its Information Technology Branch users with a digital automated accessibility testing solution (DAATS) that will help them streamline current processes and workflows, scan, identify and remove accessibility defects and barriers on their digital environments for both static webpages and complex dynamic applications as early as possible and carry the process through the development, testing, delivery, deployment and support stages. CRA users will also require this solution to collect better data, proactively monitor accessibility and issue basic and complex analytical reports for the agency on an on-going basis.

5. Solution Capabilities

- 5.1 The DAATS will be initially used by 30 to 50 individuals within the Information Technology Branch (ITB) team and may expand to other users across the agency through its ICT accessibility enterprise-wide multi-year deployment plan.
- 5.2 The DAATS will be used by both users of adaptive technologies (AT) and users using mainstream accessibility tools that has been certified by the agency.
- 5.3 The DAATS will automatically scan, find, identify and help users prevent accessibility bugs or defects during the full development cycle of all digital properties including static and dynamic websites.
- 5.4 The DAATS will scan large agency-wide external and internal websites and platforms, find, categorize defects based on success criterion, risk and critical level.
- 5.5 The DAATS will have the capability to monitor progress and execute basic and complex reports on defect, success criterions, usage, progress and conformance percentages.
- 5.6 The DAATS will provide real-time guided training and education, testing, for users on best practices for coding, testing and success criterions.
- 5.7 The DAATS will interface and directly export into issue software(s) tracking software (JIRA) Or similar tools for defect management.

6. Requirements

6.1 Mandatory Requirements

The DAATS will be required to meet the following mandatory business functional requirements.

- 6.1.1 Provide the ability to automatically identify non conformance with the [EN 301 549 V3.2.1 \(2021-03\) Accessibility Standard within webpages, coding snippets, web applications, and digital content.](#)
- 6.1.2 Allow CRA Users and stakeholders to upload webpages, coding snippets, website, and digital content directly on the platform.
- 6.1.3 Must provide the ability to complete accessibility assessments in multiple web browsers including Google Chrome, Microsoft Edge, and Mozilla Firefox, in addition to mobile views.
- 6.1.4 Allow the ability to submit a single webpage URL for analysis against accessibility standards
- 6.1.5 Allow the ability to submit multiple webpage URLs for analysis.



- 6.1.6 Must provide the ability to integrate with Adobe Experience Manager (AEM).
- 6.1.7 Must provide the ability to integrate with Drupal
- 6.1.8 Must provide the ability to integrate with Artifactory Pro
- 6.1.9 Allow CRA users to create customized scenarios and use cases for accessibility testing.
- 6.1.10 Allow CRA Users to create repository of defects and findings.
- 6.1.11 provide CRA Users with a drag and drop interface when editing the order of sections, modules, or results on a given page.
- 6.1.12 Allow CRA Users to live preview when editing pages.
- 6.1.13 Provide CRA Users with customizable end pages for test cases and activities.
- 6.1.14 Allow CRA Users to determine and set testing and activity access permissions and restrictions (e.g., 'limited to certain users', 'accessible by invitation only').
- 6.1.15 Allow CRA Users to mass distribute email notifications to a defined list of users and internal contacts.
- 6.1.16 Limit information system access privileges to authorized users only.

6.2 Analytics, Export and Reporting

- 6.2.1 The DAATS must Allow all data (i.e., account information, data defects/issues, comments and reports to be exported to at least one of the following formats and must be accessible: Microsoft Excel, Microsoft Word, PDF.
- 6.2.2 Allow defects/issues and comments to be exported to at least one of the following formats and must be accessible: Microsoft Excel, Microsoft Word, PDF.
- 6.2.3 Allow CRA Users to view results and responses in real-time.
- 6.2.4 Allow CRA Users to view summary statistics which must include.
- 6.2.5 Number of submissions or requests received, responded/completed and pending.
- 6.2.6 Provide history for each submission.
- 6.2.7 Provide name and number of users, number of defects or issues, tasks, activities.
- 6.2.8 Provide conformance/standards reference and guided learning
- 6.2.9 Provide CRA Users with access to website analytics such as google or adobe analytics (e.g., traffic, total number of visits, channel, source, medium, click-through rates, # of new sessions, bounce rate, landing pages, device type).
- 6.2.10 Allow CRA Users to generate qualitative summary reports.
- 6.2.11 Allow CRA Users to generate quantitative summary reports.
- 6.2.12 Allow CRA Users (Level 4) to pull basic reporting and analytics, such as dashboards data tables, customized reports, and simple visualizations. For example, showing the number of defects /bugs by categorization, priority and status, response rate.



- 6.2.13 Allow CRA Users to generate customized reports and filter at minimum with the following variables by date, by success criterion, by project and by user.

6.3 Accessibility Standards Requirements:

- 6.3.1 The DAATS will be required to be compliant with the [EN 301 549 V3.2.1 \(2021-03\) Accessibility Standard](#) at contract award.
- 6.3.2 A valid and recent Voluntary Product Accessibility Template (VPAT) report will be required to support the [EN 301 549 V3.2.1 \(2021-03\) Accessibility Standard](#) conformance.
- 6.3.3 Accessible user documentation in accessible digital format and alternate format if requested will be provided.

6.4 Security Requirements:

- 6.4.1 Vendor must have implemented a software and system development lifecycle that applies information system security engineering principles throughout the information system life cycle and in the development of software, websites and services, and conforms to industry standards and best practices, such as (i) NIST, (ii) ISO, (iii) ITSG-33, (iv) SAFECODE, or (v) Open Web Application Security Project (OWASP) standards such as Application Security Verification Standard (ASVS) or an equivalent standard approved by Canada in writing.
- 6.4.2 Vendor software must not interfere with the operation of any CRA and/or GoC managed Anti-Virus, Anti-Malware, Data Loss Prevention, or Host Intrusion Detection systems operating on IT systems and mobile devices.
- 6.4.3 Vendor must clearly delineate the roles and responsibilities for the security controls and features of their software and support services for (i) Account Management, (ii) Incident Management, (iii) System monitoring, and (iv) Vulnerability Management.

6.5 Architecture Requirements:

- 6.5.1 The software, as well as any future updates, versions, and patches, must protect against:
- 6.5.2 Upload file exploits, including but not restricted to Word, PDF, image, audio, and video file types.
- 6.5.3 Unauthorized third-party logical accesses to information technology systems
- 6.5.4 Domain Name System (DNS) vulnerabilities.
- 6.5.5 Denial of Service (DoS) attacks, Distributed Denial of Service (DDoS) attacks and spamming activities and comply with Canada's Anti-Spam Legislation (CASL)
<https://fightspam.gc.ca/eic/site/030.nsf/eng/home>.
- 6.5.6 Have at least 99.5% uptime and the platform must be accessible twenty-four (24) hours per day and seven (7) days per week outside of regularly scheduled or urgent maintenance.
- 6.5.7 Allow CRA Users to create URL links in both French and English to individual engagement activities.



- 6.5.8 Publish, host and maintain digital data, content in support of all testing and use case activities delivered through the platform.
- 6.5.9 Collect all CRA content data in duration of the contract, including backup of all data, content, reporting, consultation and design of platform solution from vendor.
- 6.5.10 Provide a publicly available and customizable Terms of Use and Privacy Policy page.
- 6.5.11 Employ mechanisms to quarantine malicious code.
- 6.5.12 Send automated notification alerts to CRA authorized users in the event of unauthorized access or attempts has been made to stored CRA Content.
- 6.5.13 Limit CRA data content access to authorized users only.
- 6.5.14 Enforce a minimum password complexity and change of characters.
- 6.5.15 Passwords at a minimum must include:
 - 6.5.15.1 8 alphanumeric characters in length.
 - 6.5.15.2 must not use exclusive alphabet or numeric sequences (ex: abcd or 1234).
 - 6.5.15.3 Passwords must not be the same as, or similar to, the previous 15 passwords.
 - 6.5.15.4 must not contain username or real name.
 - 6.5.15.5 at least 1 upper case.
 - 6.5.15.6 at least 1 lowercase.
 - 6.5.15.7 at least 1 numerical.
 - 6.5.15.8 at least 1 special character.
 - 6.5.15.9 store and transmit only encrypted representation of passwords.
 - 6.5.15.10 obscure feedback of authentication information.
 - 6.5.15.11 limit the number of unsuccessful logons attempts to a defined number between 5 and 10 (inclusive).
 - 6.5.15.12 be configured to lock and/or terminate (automatically) authorized CRA user sessions after 15 minutes of inactivity, or by an abrupt exit without user logoff.
 - 6.5.15.13 without losing edits/changes to form data in development progress at the solution.

6.6 Platform Requirements

- 6.6.1 The software must support LDAPv3 (Lightweight Directory Access Protocol version 3) for user account authentication. Software must support LDAP and LDAPS using Active Directory and CA eTrust Directory.
- 6.6.2 The software must allow to integrate with the CRA's existing credential and identity access management systems.
- 6.6.3 The software must have role-based access control (RBAC) for IT system administration to differentiate between the CRA system administrator and other functional user access roles.



- 6.6.4 The software must limit system access to authorized users, processes acting on behalf of authorized users, and devices (including other systems) using replay-resistant authentication.
- 6.6.5 The software must not require the use of Adobe Flash or Shockwave. If any Flash or Shockwave players and components are included or embedded with the product, they must be removed or disabled in such a way that they cannot be run by a user or program/script.
- 6.6.6 The vendor must inform the client when noncritical cyber vulnerability software patches are available within 2 weeks of being released to assist in a security event process.
- 6.6.7 The vendor must inform the client when critical cyber vulnerability software patches are available within 48 hours of being released to assist in a security event process.
- 6.6.8 The software must support disabling automatic updates.
- 6.6.9 The software user login interface or portal used in remote credential authentication and authorization connections to the platform must be configurable to support TLS connections between web server and web client using TLS versions 1.2 or later. Refer to Internet Engineering Task Force RFCs 8446 and 8446[6].
- 6.6.10 The software must support TLS versions 1.2 or later for remote connections and must be configured to use only FIPS-based cipher suites recommended by the National Institute of Standards and Technology in NIST SP 800-52 Rev. 2 and by the Canadian Centre for Cyber Security in <https://cyber.gc.ca/en/guidance/guidance-securely-configuring-network-protocols-itsp40062>.
- 6.6.11 The software must be able to support X.509 version 3 TLS certificates for mutual authentication between server and the client.
- 6.6.12 The software must initiate a session lock after a specific time-period of inactivity to be defined by the CRA Administrator and retain the session lock until the user re-establishes access by re-authenticating. After a CRA Administer defined time-period of inactivity, the platform must invalidate session keys.
- 6.6.13 The software must log audit trail of events and activities that is accessible to the CRA Administrator and must include the following:
 - 6.6.13.1 Date and time.
 - 6.6.13.2 Identification of the: user, machine, process, system connection
 - 6.6.13.3 Description of event or activity.



- 6.6.14 The software must be fully functional from inside a corporate firewall with no unauthorized access to the internet or to third party providers.
- 6.6.15 The software must not require a background internet connection for any purpose.
- 6.6.16 The software must maintain a read-only state for log entries in its repository (except upon initial load of log entries into its repository).
- 6.6.17 The software must use file integrity verification mechanisms to detect unauthorized changes in its repository.
- 6.6.18 The software must support encryption of all data at rest when in storage using FIPS 140-2 compliant AES algorithm supporting the following AES key lengths; 128, 192 and 256 bits.
- 6.6.19 The software must support Application Programming Interface (API) using either RESTful or SOAP.
- 6.6.20 If the software supports RESTful APIs, the software must use OpenID Connect, Open Authorisation 2.0 (OAuth2.0) for access protection. The software's RESTful API must be able to apply token-based authentication using JSON Web Tokens.
- 6.6.21 If the software supports SOAP, the platform must use SAML 2.0 and WS-Security SAML Token Profile for access protection.

6.7 Platform Account

- 6.7.1 The vendor must provide (30– 50) unique username and password-protected accounts with tiered levels of access that allow CRA Users to design, create and manage all testing, use case and reporting activities.
- 6.7.2 The DAATS must provide a user management system and administration control panel that allows the administration accounts (Level 4) to manage the following CRA User Account Levels within the platform:



CRA User Account Level	Description	Quantity
1	<ul style="list-style-type: none"> ability to view accessibility testing procedures, standards, best practices, training guides and resources or other pages for the purposes of conducting accessibility testing, evaluation or educational purposes. 	Unlimited
2	<ul style="list-style-type: none"> ability to add projects, or requests for testing purposes and prioritize and assign to designated stakeholders and reply to direct messages from Engagement stakeholders. 	10-15
3	<ul style="list-style-type: none"> ability to conduct automated and manual testing, review evaluations, publish testing results, and reporting activities using the accessibility solution. 	20-40
4	<ul style="list-style-type: none"> full administrative rights which include levels 1 to 3. the ability to manage additional functionalities in the platform, such as user registration and management, Access Permissions, tracking and reporting access and creation. 	5-10



7. Contractor Engagement and Tasks

7.1 Assigned Lead

The provider contractor will:

- 7.1.1 Provide an Account Manager (AM) to act as a primary contact for the Project Authority (PA) and CRA Users.

7.2 Client Support Services

7.2.1 Monitoring Support

The vendor must:

- 7.2.1.1 Conduct periodic technical, security and user acceptance testing and monitoring to ensure uninterrupted functionality.
- 7.2.1.2 Monitor user-generated content during consultation activities for inappropriate content (such as abusive and Offensive Language, explicit content/images/files) or any attempts to disrupt the consultation or the website. If any issues arise the vendor must notify the Project Authority.

provide troubleshooting and technical support services to Engagement Participants in consultation activities by telephone or email.

7.2.2 User Support

The vendor must:

- 7.2.2.1 Attend meetings with the PA and CRA Users. Meetings can take place by teleconference or videoconference and if attendance in-person would result in travel costs to Ottawa.
- 7.2.2.2 Meet with the PA and CRA Users as follows:

Meeting 1: Initial Setup

The vendor must define requirements for personalized setup, user account creation, user management of entire system, report requirements as well as establish clear timelines for training and the date the platform will be ready for full use.

Meeting 2: Technical Issue Review

The vendor and the CRA Users will discuss any outstanding issues, including timelines for resolution, and answer any questions related to the solution and platform.

Meeting 3: Shake Down.



Use case setup, run pilot and evaluate results prior to full release and deployment.

Meeting 4: Final review of the solution and Platform

7.2.2.3 The vendor must provide a final overview of the solution and demonstrate that all outstanding issues have been resolved and the solution is fully functional and ready for release.

7.3 Technical Support

The vendor must provide ongoing technical support services to CRA Users during regular Business Hours to resolve technical issues and ensure continued Reliability of the platform as follows:

7.3.1 Help Desk

7.3.1.1 CRA Users must be able to either call a toll-free direct dial telephone number or email for support if encountering any difficulties with the platform.

7.3.1.2 If contacting the help desk via email, the user shall receive a notification or acknowledgement within 24 hours that the request has been received.

7.3.2 At least 80% of issues must be resolved within 48 hrs of acknowledgement.

7.4 Urgent Issue Reporting

CRA Users must have a separate mechanism (e.g., Account Manager, direct telephone number or email) to report urgent issues (e.g., problems arising the day of the release/launch or problems arising during a testing or evaluation Activity) and they must be addressed within 24 hours.

7.5 Training

The vendor must:

7.5.1 Provide five (5) days of live training (web-based or in-person), equivalent to 30-35 hours of instruction during the first months of the contract at no extra cost.

7.5.2 The vendor must also provide training as and when required throughout the remainder of the contract.

7.5.3 Training must be provided in English and French at no additional cost to CRA.

7.5.4 Provide CRA Users with accessible training aids and self-learning resources (e.g., manuals, tutorials, help guides) in either English or French. Materials should follow best practices as outlined in this accessibility toolkit: [Create Accessible Documents in Office](#)



[2016 \(https://a11y.canada.ca/en/guides/office2016/\)](https://a11y.canada.ca/en/guides/office2016/). To comply with official language requirements, the Contractor agrees to grant.

- 7.5.5 CRA irrevocable permission to translate and internally redistribute all training materials identified earlier.

7.6 'As and When Requested' Support Services

7.7.1 Strategic Advice and Operational Support:

The following services are to be provided on an as and when requested basis through Task Authorizations.

7.7.1.1 Provide CRA Users with advice during the planning, implementation and closure stages of the project.

7.7.1.2 Design and build testing and assessment activities on the platform using pre-existing content (use cases) provided by the PA.

7.7.1.3 Provide advice concerning the organization and public display of both open and closed online testing and assessment activities on the solution platform to align with international standards, CRA web strategies and Government of Canada.

7.7.2 Reporting requirements.

7.7.2.1 Provide support in manually creating, transferring and documenting information related to previous online testing and assessment activities conducted by the CRA on the new DAATS platform.

7.7.2.2 Compile and analyze raw data for basic and complex analytics as requested.

7.7.2.3 Create and write reports using results and data from manual and automated testing and assessment activities as requested.

7.7.2.4 Provide CRA Users with status updates concerning participant uptake and details for testing and assessment activities.



ANNEX C: MANDATORY EVALUATION CRITERIA

1. Evaluation Procedures

Responses will be evaluated in accordance with all the mandatory evaluation criteria detailed below. The Respondent must provide supporting documentation in its response in order to demonstrate that each mandatory requirement has been met. To assist with the evaluation process, the CRA requests that the Respondent indicate in the table below where in its response the information is located. Responses that fail to meet any mandatory requirements will be disqualified and will receive no further consideration.

2. Project References

2.1 Each project reference provided by the Respondent must include the following information:

- Customer Organization receiving services for the reference project.
- Customer Organization Primary reference name, title, e-mail and telephone number.
- Customer Organization Backup reference name, title, e-mail and telephone number.
- Project's Name.
- Project's Duration (including start date, completion of implementation and end date, if applicable).
- General Project Description (e.g., work performed, experience gained) .
- Explanation, using specific detailed examples, how the project demonstrates resemblance with the preliminary SOR.

If the information provided by a reference differs from the information supplied by the Respondent, the information provided by the reference will be the information evaluated.

2.2 The project description must clearly demonstrate that the Respondent meets all mandatory requirements.

Simply repeating the requirement does not, in itself, demonstrate that a Respondent has the experience required. Details demonstrating compliance are required.

2.3 The Respondent's experience will be evaluated on a simple pass/fail basis.

2.4 In the case of a joint venture Respondent, each Project Reference given can be from a different joint venture member. The Project References are not required to be projects performed by the joint venture Respondent itself.

2.5 The CRA will only consider the experience of the Respondent itself, subject to the following:

- The experience of a corporate predecessor will be evaluated as experience of the Respondent if:
 - The corporate predecessor amalgamated with another corporation to form the Respondent; or
 - All or substantially all the assets of the corporate predecessor were acquired by the Respondent, the majority of the corporate predecessor employees became employees of the Respondent, and both the corporate predecessor and the Respondent carry on essentially the same business; or
 - All or substantially all of a specific business unit that was responsible within the corporate predecessor for the work connected with the experience requirement has been transferred to the Respondent, along with all or substantially all the employees of that business unit, and the Respondent continues to carry on essentially the same business as that business unit.
- Respondents must use Project References of their own.

The CRA will not consider the experience of an affiliate of the Respondent.



2.6 The customer organization for each Project Reference must not be related to the Respondent (i.e., the customer organization must not be an affiliate and must deal at arm's length with the Respondent in order to be considered as a Project Reference).

3. Mandatory Technical Requirements

Mandatory Technical Requirements		Page Reference
The proposal MUST demonstrate that the following mandatory criteria are met:		
M1 - Corporate Experience and Capabilities	<p>Within the last five (5) years, at ITQ closing, the Respondent must have been the prime contractor providing digitized and manual accessibility testing solutions services, as defined in the Annex B, Statement of Requirements (SOR):</p> <ul style="list-style-type: none"> • for at least three (3) client organizations • with a minimum of two (2) programs or business processes related to the management, quality control and conformance of digital properties to recognized accessibility requirements and standards. <p>The Respondent must have provided ongoing services over a period of twelve (12) consecutive months. In order to demonstrate compliance, the Respondent must provide a Project Reference for each client organization referenced above in a format outlined in 2.0 Project References and also include the following information:</p> <ol style="list-style-type: none"> 1. High-level objectives 2. High-level milestones and deliverables 3. Success criteria 4. Lessons learned 	
M2 - Accessibility Requirements	<p>The Respondent MUST demonstrate compliance with the following accessibility requirements and standards:</p> <ul style="list-style-type: none"> • EN 301 549 V3.2.1 (2021-03) Accessibility Standard, the ISO Accessibility for all ISO/IEC Guide 71, Guide and the Web Content Accessibility Guidelines (https://www.w3.org/WAI/WCAG21/) <p>To demonstrate compliance, the Respondent MUST:</p> <ol style="list-style-type: none"> 1. Provide an example of a voluntary product accessibility template (VPAT) for the products they offer: 2. A written Statement of how the respondent complies with accessibility standards by partnering with accessibility related agencies and standards board; or 3. Provide a written statement from a previous or current client organization confirming the Respondent's ability to comply with such standards based on services 	



	rendered or based on compliance evaluations completed for that client.	
M3 - Operational Processes related to Accessibility Testing	<p>The Respondent MUST provide on-premises (residing in a designated secured Canadian location) automated and manual managed testing services or solutions that will:</p> <ul style="list-style-type: none"> • have the ability to scan digital properties such as websites, html properties, and applications; • the ability to process single and multiple digital properties, • monitor and report on end-to-end process such as the software development life cycle (SDLC) while ensuring compliance with accessibility standards and best practices. <p>The Respondent must demonstrate compliance by:</p> <ol style="list-style-type: none"> 1. A written statement from an existing or previous client organization confirming that these services have been provided to the client within the last five (5) years, at ITQ closing; or 2. Providing standard operating procedures which contain evidence that the Respondent has existing automated and manual digital testing processing procedures. 	
M4 - Information Technology	<p>The services rendered for at least two (2) years to the clients organizations referenced in M1 MUST adhere to the Government of Canada's Direction for Electronic Data Residency as outlined within the IT Policy Implementation Notice (ITPIN) No: 2017-02.</p> <p>To demonstrate compliance, the Respondent MUST:</p> <ul style="list-style-type: none"> • provide technical and architecture designs and requirements that support the provision of these services from a client dedicated secured (on-premises) location. <p>Respondent will provide:</p> <ul style="list-style-type: none"> • a written statement from at least two (2) of the previously referenced client organizations, where services were rendered in compliance with a GC-approved computing facility for Protected B data (or equivalent Provincial, Municipal, Academic institution, School Board or Hospital) located within the geographic boundaries of Canada, where all data remained encrypted when in transit 	
M5 - Training and Educational Content	<p>The respondent must have a minimum of five (5) years of experience at ITQ closing in delivering automated and manual accessibility testing training and educational content in both official languages and must provide learning and educational offerings virtually and/or on premise.</p>	



	<p>The respondent will provide:</p> <ol style="list-style-type: none">1. samples of accessibility testing related learning material in various formats and content on the use of their tools.2. a written statement from at least two (2) of the previously referenced client organizations on their ability to deliver automated and manual accessibility testing to their users.	
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