



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

**Bid Receiving - PWGSC / Réception des
soumissions - TPSGC**

11 Laurier St., / 11, rue Laurier

Place du Portage, Phase III

Core 0B2 / Noyau 0B2

Gatineau

Québec

K1A 0S5

Bid Fax: (819) 997-9776

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

**Proposal To: Public Works and Government
Services Canada**

We hereby offer to sell to Her Majesty the Queen in right of Canada, in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the goods, services, and construction listed herein and on any attached sheets at the price(s) set out therefor.

**Proposition aux: Travaux Publics et Services
Gouvernementaux Canada**

Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées ou incluses par référence dans la présente et aux annexes ci-jointes, les biens, services et construction énumérés ici sur toute feuille ci-annexée, au(x) prix indiqué(s).

Comments - Commentaires

Title - Sujet Informatics Pro Services - PSAB	
Solicitation No. - N° de l'invitation 47419-206529/A	Date 2019-06-03
Client Reference No. - N° de référence du client 1000346529	
GETS Reference No. - N° de référence de SEAG PW-\$\$EL-632-35770	
File No. - N° de dossier 632el.47419-206529	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2019-06-25	Time Zone Fuseau horaire Eastern Daylight Saving Time EDT
F.O.B. - F.A.B. Specified Herein - Précisé dans les présentes Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input checked="" type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Lapalme, Francis	Buyer Id - Id de l'acheteur 632el
Telephone No. - N° de téléphone (613) 858-9912 ()	FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: Specified Herein Précisé dans les présentes	

Instructions: See Herein

Instructions: Voir aux présentes

Vendor/Firm Name and Address

**Raison sociale et adresse du
fournisseur/de l'entrepreneur**

Issuing Office - Bureau de distribution

Informatics Professional Services - EL Division/Services
professionnels en informatique - division EL

Terrasses de la Chaudière 4th Floor

10 Wellington Street

Gatineau

Québec

K1A 0S5

Delivery Required - Livraison exigée See Herein	Delivery Offered - Livraison proposée
Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Telephone No. - N° de téléphone Facsimile No. - N° de télécopieur	
Name and title of person authorized to sign on behalf of Vendor/Firm (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)	
Signature	Date

BID SOLICITATION

FOR CONTRACTS AGAINST A SUPPLY ARRANGEMENT

**FOR TASK- BASED INFORMATICS PROFESSIONAL SERVICES
(TBIPS)**

FOR

**VARIOUS INFORMATICS PROFESSIONAL RESOURCE CATEGORIES
(SEE HEREIN)**

REQUESTED BY

THE CANADA BORDER SERVICES AGENCY (CBSA)

THIS DOCUMENT CONTAINS SECURITY REQUIREMENTS

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List of Annexes to the Resulting Contract:

Annex A - Statement of Work

Appendix A to Annex A - Tasking Assessment Procedure
Appendix B to Annex A - Task Authorization (TA) Form
Appendix C to Annex A - Resources Assessment Criteria and Response Table
Appendix D to Annex A - Certifications at the TA stage

Annex B – Basis of Payment

Annex C - Security Requirements Check List

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

Attachment "1": Bid Submission Form
Attachment "2": Bid Evaluation Criteria – Mandatory Requirements
Attachment "3": Bid Evaluation Criteria – Rated Requirements
Attachment "4": Pricing Schedule
Attachment "5": Electronic Payment Instruments

List of Attachment to Part 5 (Certifications):

Attachment "6": Federal Contractors Program for Employment Equity – Certification
Attachment "7": Canadian Content Certification
Attachment "8": Set-aside for Aboriginal Business - Certification

PART 1 - GENERAL INFORMATION

1.1 Introduction

This document states terms and conditions that apply to this bid solicitation. It is divided into seven parts plus attachments and annexes, as follows:

Part 1 General Information: provides a general description of the requirement;

Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;

Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;

Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, if applicable, and the basis of selection;

Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;

Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by Bidders; and

Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The annexes include the Statement of Work, the Basis of Payment and the Security Requirements Checklist.

1.2 Summary

- (a) This bid solicitation is being issued to satisfy the requirement of the Canada Border Services Agency (CBSA) (the "**Client**") for Task-Based Informatics Professional Services (TBIPS) under the TBIPS Supply Arrangement (SA) method of supply.
- (b) It is intended to result in the award of up to two contracts in Workstream 1 and one contract in Workstream 2, with each contract purchasing Work from only one Workstream. Each contract will be for two years plus three one-year irrevocable options allowing Canada to extend the term of the contract. Bidders do not have to submit a bid for each Workstream. In the event that a Bidder wants to bid on more than one Workstream, a separate technical bid should be submitted for each Workstream if the Bidder chooses to submit its bid in hard copies.
- (c) There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 – Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the Contract Security Program of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.
- (d) The requirement is subject to a preference for Canadian services.
- (e) This procurement is set aside under the federal government Procurement Strategy for Aboriginal Business. For more information on Aboriginal business requirements of the Set-aside Program for Aboriginal Business, refer to Annex 9.4 of the Supply Manual.
- (f) This procurement is set aside from the international trade agreements under the provision each has for measures with respect to Aboriginal peoples or for set-asides for small and minority businesses.
- (g) Further to Article 800 of the Canadian Free Trade Agreement (CFTA), CFTA does not apply to this procurement."

- (h) The Federal Contractor’s Program (FCP) for employment equity applies to this procurement; see Part 5 – Certifications and Additional Information, Part 7 – Resulting Contract Clauses and the attachment titled “Federal Contractors Program for Employment Equity – Certification.”
- (i) This bid solicitation allows bidders to use the epost Connect service provided by Canada Post Corporation to transmit their bid electronically. Bidders must refer to Part 2 entitled “Bidder Instructions, and Part 3 entitled “Bid Preparation Instructions”, of the bid solicitation, for further information.
- (j) Only Aboriginal TBIPS SA Holders currently holding a TBIPS SA for Tier 2, in all resource categories of a given Workstream and in the National Capital Region under the EN578-170432 series of SAs are eligible to compete. The TBIPS SA EN578-170432 is incorporated by reference and forms part of this bid solicitation, as though expressly set out in it, subject to any express terms and conditions contained in this bid solicitation. The capitalized terms not defined in this bid solicitation have the meaning given to them in the TBIPS SA.
- (k) SA Holders that are invited to compete as a joint venture must submit a bid as that joint venture SA Holder, forming no other joint venture to bid. Any joint venture must be already qualified under the SA #EN578-170432 as that joint venture at the time of bid closing in order to submit a bid.
- (l) For each Workstream, the Resource Categories described below are required on an as and when requested basis in accordance with the TBIPS SA Annex “A”:

WORKSTREAM 1

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
A.1 – Application/Software Architect	LEVEL 3	1
A.6 – Programmer/Software Developer	LEVEL 2	1
A.6 – Programmer/Software Developer	LEVEL 3	1
A.8 – System Analyst	LEVEL 3	1
A.13 – Web Designer	LEVEL 2	1
I.7 – Platform Analyst	LEVEL 3	1
I.11 – Technology Architect	LEVEL 3	1
B.1 – Business Analyst	LEVEL 3	1
B.6 – Business System Analyst	LEVEL 2	1
B.6 – Business System Analyst	LEVEL 3	1
B.14 – Technical Writer	LEVEL 2	1
B.14 – Technical Writer	LEVEL 3	1
P.5 – Project Executive	LEVEL 3	1

WORKSTREAM 2

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
C.1 – Strategic Information Technology Security Planning and Protection Consultant	LEVEL 3	1

1.3 Debriefings

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within 15 working days from receipt of the results of the bid solicitation process. The debriefing may be provided in writing, by telephone or in person.

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

- (a) All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the *Standard Acquisition Clauses and Conditions Manual* (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.
- (b) Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract(s).
- (c) The 2003 (2018-05-22) Standard Instructions - Goods or Services - Competitive Requirements are incorporated by reference into and form part of the bid solicitation. If there is a conflict between the provisions of 2003 and this document, this document prevails.
- (d) Subsection 3.a. of Section 01, Integrity provisions - bid of Standard Instructions 2003 incorporated by reference above is deleted in its entirety and replaced with the following:
 - a. at the time of submitting an arrangement under the Request for Supply Arrangement (RFSA), the Bidder has already provided a list of names, as requested under the *Ineligibility and Suspension Policy*. During this procurement process, the Bidder must immediately inform Canada in writing of any changes affecting the list of names.
- (e) Subsection 4 of Section 05, Submission of bids of Standard Instructions 2003 incorporated by reference above, is amended as follows:

Delete: 60 days

Insert: 180 days
- (f) Subsection 1 of Section 08, Transmission by facsimile or by epost Connect of Standard Instructions 2003 incorporated by reference above, is deleted and replaced by the following:
 - 1. Facsimile

Due to the nature of the bid solicitation, bids transmitted by facsimile or electronic mail to PWGSC will not be accepted.
- (g) Subsection 2 of Section 08, Transmission by facsimile or by epost Connect of Standard Instructions 2003 incorporated by reference above, is deleted and replaced by the following:
 - 2. epost Connect
 - a. Unless specified otherwise in the bid solicitation, bids may be submitted by using the [epost Connect service](#) provided by Canada Post Corporation.
 - i. PWGSC, National Capital Region: The only acceptable email address to use with epost Connect for responses to bid solicitations issued by PWGSC headquarters is:

[tps-gc-pwgsc.gc.ca](mailto:tpsgc.dgareceptiondessomissions-abbidreceiving.pwgsc@tps-gc-pwgsc.gc.ca)

or, if applicable, the email address identified in the bid solicitation.
 - ii. PWGSC regional offices: The only acceptable email address to use with epost Connect for responses to bid solicitations issued by PWGSC regional offices is identified in the bid solicitation.
 - b. To submit a bid using epost Connect service, the Bidder must either:

-
- i. send directly its bid only to the specified PWGSC Bid Receiving Unit, using its own licensing agreement for epost Connect provided by Canada Post Corporation; or
 - ii. send as early as possible, and in any case, 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 specified PWGSC Bid Receiving Unit requesting to open an epost Connect conversation. Requests to open an epost Connect conversation received after that time may not be answered.
- c. If the Bidder sends an email requesting epost Connect service to the specified Bid Receiving Unit in the bid solicitation, an officer of the Bid Receiving Unit will then initiate an epost Connect conversation. The epost Connect conversation will create an email notification from Canada Post Corporation prompting the Bidder to access and action the message within the conversation. The Bidder will then be able to transmit its bid afterward at any time prior to the solicitation closing date and time.
 - d. If the Bidder is using its own licensing agreement to send its bid, the Bidder must keep the epost Connect conversation open until at least 30 business days after the solicitation closing date and time.
 - e. The bid solicitation number should be identified in the epost Connect message field of all electronic transfers.
 - f. It should be noted that the use of epost Connect service requires a Canadian mailing address. Should a bidder not have a Canadian mailing address, they may use the Bid Receiving Unit address specified in the solicitation in order to register for the epost Connect service.
 - g. For bids transmitted by epost Connect service, Canada 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 epost Connect service;
 - iii. incompatibility between the sending and receiving equipment;
 - iv. delay in transmission or receipt of the bid;
 - v. failure of the Bidder to properly identify the bid;
 - vi. illegibility of the bid;
 - vii. security of bid data; or,
 - viii. inability to create an electronic conversation through the epost Connect service.
 - h. The Bid Receiving Unit will send an acknowledgement of the receipt of bid document(s) via the epost Connect conversation, regardless of whether the conversation was initiated by the supplier using its own license or the Bid Receiving Unit. This acknowledgement will confirm only the receipt of bid document(s) and will not confirm if the attachments may be opened nor if the content is readable.
 - i. Bidders must ensure that they are using the correct email address for the Bid Receiving Unit when initiating a conversation in epost Connect or communicating with the Bid Receiving Unit and should not rely on the accuracy of copying and pasting the email address into the epost Connect system.
 - j. A bid transmitted by epost Connect service constitutes the formal bid of the Bidder and must be submitted in accordance with section 05.

2.2 Submission of Bids

- (a) Bids must be submitted only to the Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and at the PWGSC address indicated on page one of the bid solicitation.

Note: For bidders choosing to submit using epost Connect for bids closing at the Bid Receiving Unit in the National Capital Region (NCR) the email address is:

tpsgc.dgareceptiondessoumissions-abbidreceiving.pwgsc@tpsgc-pwgsc.gc.ca

Note: Bids will not be accepted if emailed directly to this email address. This email address is to be used to open an epost Connect conversation, as detailed in Standard Instructions 2003, or to send bids through an epost Connect message if the bidder is using its own licensing agreement for epost Connect.

- (b) Due to the nature of the bid solicitation, bids transmitted by facsimile or electronic mail to PWGSC will not be accepted.

2.3 Enquiries - Bid Solicitation

- (a) All enquiries must be submitted in writing to the Contracting Authority no later than five calendar days before the bid closing date. Enquiries received after that time may not be answered.
- (b) Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated, and the enquiry can be answered with copies to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

2.4 Former Public Servant

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

(b) **Definitions**

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

- (i) an individual;
- (ii) an individual who has incorporated;
- (iii) a partnership made of former public servants; or
- (iv) a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

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

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

(c) **Former Public Servant in Receipt of a Pension**

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

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

- (i) name of former public servant;
- (ii) date of termination of employment or retirement from the Public Service.

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with [Contracting Policy Notice: 2012-2](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

(d) **Work Force Adjustment Directive**

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

If so, the Bidder must provide the following information:

- (i) name of former public servant;
- (ii) conditions of the lump sum payment incentive;
- (iii) date of termination of employment;
- (iv) amount of lump sum payment;
- (v) rate of pay on which lump sum payment is based;
- (vi) period of lump sum payment including start date, end date and number of weeks;
- (vii) number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

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

2.5 Applicable Laws

Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

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

2.6 Improvement of Requirement During Solicitation Period

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reasons for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority in accordance with the article entitled "Enquiries - Bid Solicitation". Canada will have the right to accept or reject any or all suggestions.

2.7 Basis for Canada's Ownership of Intellectual Property

- (a) The Canada Border Services Agency has determined that any intellectual property rights arising from the performance of the Work under any resulting contract will belong to Canada, on the following grounds:
 - (i) National Security

2.8 Volumetric Data

The estimated number of resources required per resource category has been provided to Bidders to assist them in preparing their bids. The inclusion of this data in this bid solicitation does not represent a commitment by Canada that Canada's future usage of the service identified in this bid solicitation will be consistent with this data. It is provided purely for information purposes.

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

(a) Epost Connect Bid Submission

- (i) If the Bidder chooses to submit its bid electronically, Canada requests that the Bidder submits its bid in accordance with section 08 of the 2003 Standard Instructions. The epost Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation.
- (ii) The bid must be gathered per section and separated as follows:
 - (A) Section I: Technical Bid
 - (B) Section II: Financial Bid
 - (C) Section III: Certifications
- (iii) For further information please refer to article 08 - Transmission by facsimile or by epost Connect at <https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/1/2003/23#transmission-by-facsimile>.

(b) Soft Copy Bid Submission (CD or USB key)

- (i) If the Bidder chooses to submit its bid in soft copy via the PWGSC Bid Receiving Unit, Canada requests that the Bidder submits its bid in separate sections as follows:
 - (A) Section I: Technical Bid – One soft copy on a USB key
 - (B) Section II: Financial Bid – One soft copy on a SEPARATE USB key
 - (C) Section III: Certifications – One soft copy on a USB key
- (c) If the Bidder is simultaneously providing an epost Connect copy and soft copy of the bid and if there is a discrepancy between the wording of the epost Connect copy and soft copy, the wording of the epost Connect copy will have priority over the wording of the soft copy.
- (d) Canada is not requesting a hard copy of the bid. However, if the Bidder submits a hard copy of its bid, and if there is a discrepancy between the wording of the soft or epost Connect copy and the hard copy, the wording of the soft or epost Connect copy will have priority over the wording of the hard copy.
- (e) Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.
- (f) **Format for Bid:** Canada requests that Bidders follow the format instructions described below in the preparation of their bid:
 - (i) use 8.5 x 11 inch (216 mm x 279 mm) page size;
 - (ii) use a numbering system that corresponds to the bid solicitation;
 - (iii) include a title page at the front of each volume of the bid that includes the title, date, bid solicitation number, bidder's name and address and contact information of its representative; and
 - (iv) include a table of contents.
- (g) **Canada's Policy on Green Procurement:** In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process. See the Policy on Green Procurement (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, Bidders should:

- (i) use paper containing fibre certified as originating from a sustainably-managed forest and/or containing a minimum of 30% recycled content; and
 - (ii) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, and using staples or clips instead of cerlox, duotangs or binders.
- (h) **Submission of Only One Bid:**
- (i) A Bidder, including related entities, will be permitted to submit only one bid in response to this bid solicitation. If a Bidder or any related entities participate in more than one bid (participating means being part of the Bidder, not being a subcontractor), Canada will provide those Bidders with 2 working days to identify the single bid to be considered by Canada. Failure to meet this deadline will result in all the affected bids being disqualified. A single bid may contain bids to be awarded a contract in one or more Workstreams. However, a bid may not contain a bid from the Bidder, including related entities to be awarded more than one contract in any given Workstream.
 - (ii) For the purposes of this Article, regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law (whether that entity is a natural person, corporation, partnership, etc), an entity will be considered to be "**related**" to a Bidder if:
 - (A) they are the same legal entity (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);
 - (B) they are "related persons" or "affiliated persons" according to the Canada Income Tax Act;
 - (C) the entities have now or in the two years before bid closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
 - (D) the entities otherwise do not deal with one another at arm's length, or each of them does not deal at arm's length with the same third party.
 - (iii) Individual members of a joint venture cannot participate in another bid, either by submitting a bid alone or by participating in another joint venture. .
- (i) **Joint Venture Experience:**
- (i) Where the Bidder is a joint venture with existing experience as that joint venture, it may submit the experience that it has obtained as that joint venture.

Example: A bidder is a joint venture consisting of members L and O. A bid solicitation requires that the bidder demonstrate experience providing maintenance and help desk services for a period of 24 months to a customer with at least 10,000 users. As a joint venture (consisting of members L and O), the bidder has previously done the work. This bidder can use this experience to meet the requirement. If member L obtained this experience while in a joint venture with a third party N, however, that experience cannot be used because the third party N is not part of the joint venture that is bidding.
 - (ii) A joint venture bidder may rely on the experience of one of its members to meet any given technical criterion of this bid solicitation.

Example: A bidder is a joint venture consisting of members X, Y and Z. If a solicitation requires: (a) that the bidder have 3 years of experience providing maintenance service, and (b) that the bidder have 2 years of experience integrating hardware with complex networks, then each of these two requirements can be met by a different member of the joint venture. However, for a single criterion, such as the requirement for 3 years of experience providing maintenance services, the bidder cannot indicate that each of

members X, Y and Z has one year of experience, totaling 3 years. Such a response would be declared non-responsive.

- (iii) Joint venture members cannot pool their abilities with other joint venture members to satisfy a single technical criterion of this bid solicitation. However, a joint venture member can pool its individual experience with the experience of the joint venture itself. Wherever substantiation of a criterion is required, the Bidder is requested to indicate which joint venture member satisfies the requirement. If the Bidder has not identified which joint venture member satisfies the requirement, the Contracting Authority will provide an opportunity to the Bidder to submit this information during the evaluation period. If the Bidder does not submit this information within the period set by the Contracting Authority, its bid will be declared non-responsive.

Example: A bidder is a joint venture consisting of members A and B. If a bid solicitation requires that the bidder demonstrate experience providing resources for a minimum number of 100 billable days, the bidder may demonstrate that experience by submitting either:

- Contracts all signed by A;
- Contracts all signed by B; or
- Contracts all signed by A and B in joint venture, or
- Contracts signed by A and contracts signed by A and B in joint venture, or
- Contracts signed by B and contracts signed by A and B in joint venture.

That show in total 100 billable days.

- (iv) Any Bidder with questions regarding the way in which a joint venture bid will be evaluated should raise such questions through the Enquiries process as early as possible during the bid solicitation period.

3.2 Section I: Technical Bid

- (a) The technical bid consists of the following:

- (i) **Bid Submission Form:** Bidders are requested to include the Bid Submission Form - Attachment "1" with their bids. It provides a common form in which bidders can provide information required for evaluation and contract award, such as a contact name and the Bidder's Procurement Business Number, etc. Using the form to provide this information is not mandatory, but it is recommended. If Canada determines that the information required by the Bid Submission Form is incomplete or requires correction, Canada will provide the Bidder with an opportunity to do so.
- (ii) **Security Clearance:** Bidders are requested to submit the following security information for each of the proposed resources with their bids on or before the bid closing date:

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

If the Bidder has not included the security information in its bid, the Contracting Authority will provide an opportunity to the Bidder to submit the security information during the

evaluation period. If the Bidder has not submitted the security information within the period set by the Contracting Authority, its bid will be declared non-responsive.

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

(A) **Mandatory Technical Criteria:** The technical bid must substantiate the compliance with the specific articles of Attachment "2", which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work. Simply stating that the Bidder or its proposed solution or resources comply is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be considered non-responsive and disqualified. The substantiation may refer to additional documentation submitted with the bid - this information can be referenced in the "Bidder's Response" column of Attachment "2", where Bidders are requested to indicate where in the bid the reference material can be found, including the title of the document, and the page and paragraph numbers; where the reference is not sufficiently precise, Canada may request that the Bidder direct Canada to the appropriate location in the documentation.

(B) **Point-Rated Technical Criteria:** The technical bid must substantiate the compliance with the specific articles of Attachment "3", which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work. Simply stating that the Bidder or its proposed solution or resources comply is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be rated accordingly. The substantiation may refer to additional documentation submitted with the bid - this information can be referenced in the "Bidder's Response" column of Attachment "3", where Bidders are requested to indicate where in the bid the reference material can be found, including the title of the document, and the page and paragraph numbers; where the reference is not sufficiently precise, Canada may request that the Bidder direct Canada to the appropriate location in the documentation.

(iv) **For Proposed Resources:** The technical bid must include résumés for the resources as identified in Attachment "2". The same individual must not be proposed for more than one Resource Category or more than one Workstream. The Technical bid must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:

(A) Proposed resources may be employees of the Bidder or employees of a subcontractor, or these individuals may be independent contractors to whom the Bidder would subcontract a portion of the Work (refer to Part 5, Certifications).

(B) For educational requirements for a particular degree, designation or certificate, PWGSC will only consider educational programs that were successfully completed by the resource by the time of bid closing. If the degree, designation or certification was issued by an educational institution outside of Canada, the Bidder is requested to provide a copy of the results of the academic credential assessment and qualification recognition service issued by an agency or organization recognized by the Canadian Information Centre for International Credentials (CICIC). If the Bidder has not included the copy of the results in its bid, the Contracting Authority will provide an opportunity to the Bidder to submit it during the evaluation period. If the Bidder has not submitted the copy of the results within 2 working days of the request by the Contracting Authority, its bid will be declared non-responsive.

- (C) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of bid closing and must continue, where applicable, to be a member in good standing of the profession or membership throughout the evaluation period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this solicitation. If the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued. If the degree, diploma or certification was issued by an educational institution outside of Canada, the Bidder is requested to provide a copy of the results of the academic credential assessment and qualification recognition service issued by an agency or organization recognized by the Canadian Information Centre for International Credentials (CICIC). If the Bidder has not included the copy of the results in its bid, the Contracting Authority will provide an opportunity to the Bidder to submit it during the evaluation period. If the Bidder has not submitted the copy of the results within 2 working days of the request by the Contracting Authority, its bid will be declared non-responsive.
- (D) For work experience, PWGSC will not consider experience gained as part of an educational program, except for experience gained through a formal co-operative program at a post-secondary institution.
- (E) For any requirements that specify a particular time period (e.g., 2 years) of work experience, PWGSC will disregard any information about experience if the technical bid does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
- (F) For work experience to be considered by Canada, the technical bid must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the qualification requirements, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.
- (v) **Customer Reference Contact Information:**
- (A) The Bidder must provide customer references. The customer reference must each confirm, if requested by PWGSC, the facts identified in the Bidder's bid, as required by Attachments "2" and "3".
- (B) The form of question to be used to request confirmation from customer references is as follows:
- [Sample Question to Customer Reference: "Has [the Bidder] provided your organization with [describe the services and, if applicable, describe any required time frame within which those services must have been provided]?"*
- Yes, the Bidder has provided my organization with the services described above.

No, the Bidder has not provided my organization with the services described above.

I am unwilling or unable to provide any information about the services described above.

- (C) For each customer reference, the Bidder must, at a minimum, provide the name, telephone number and e-mail address for a contact person. If only the telephone number is provided, it will be used to call to request the e-mail address and the reference check will be done by e-mail.

Bidders are also requested to include the title of the contact person. It is the sole responsibility of the Bidder to ensure that it provides a contact who is knowledgeable about the services the Bidder has provided to its customer and who is willing to act as a customer reference. Crown references will be accepted.

3.3 Section II: Financial Bid

- (a) **Pricing:** Bidders must submit their financial bid in accordance with the Pricing Schedule provided in Attachment "4". The total amount of Applicable Taxes must be shown separately, if applicable. Unless otherwise indicated, bidders must include a single, firm, all-inclusive per diem rate quoted in Canadian dollars in each cell requiring an entry in the pricing tables.
- (b) **All Costs to be Included:** The financial bid must include all costs for the requirement described in the bid solicitation for the entire Contract Period, including any option periods. The identification of all necessary equipment, software, peripherals, cabling and components required to meet the requirements of the bid solicitation and the associated costs of these items is the sole responsibility of the Bidder.
- (c) **Blank Prices:** Bidders are requested to insert "\$0.00" for any item for which it does not intend to charge or for items that are already included in other prices set out in the tables. If the Bidder leaves any price blank, Canada will treat the price as "\$0.00" for evaluation purposes and may request that the Bidder confirm that the price is, in fact, \$0.00. No bidder will be permitted to add or change a price as part of this confirmation. Any bidder who does not confirm that the price for a blank item is \$0.00 will be declared non-responsive.
- (d) **Electronic Payment of Invoices – Bid:** If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Attachment "5" Electronic Payment Instruments, to identify which ones are accepted. If Attachment "5" Electronic Payment Instruments is not completed, it will be considered as if Electronic Payment Instruments are not being accepted for payment of invoices. Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

3.4 Section III: Certifications

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

ATTACHMENT 1

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

<p>Security Clearance Level of Bidder [include both the level and the date it was granted] [Note to Bidders: Please ensure that the security clearance matches the legal name of the Bidder. If it does not, the security clearance is not valid for the Bidder.]</p>		
<p>Required Security Clearance Level of the following proposed resource categories:</p> <ol style="list-style-type: none"> A.1 – Application/Software Developer – Level 3: Reliability Status (Workstream 1) A.6 - Programmer/Software Developer – Level 3: Reliability Status (Workstream 1) C.1 – Strategic Information Technology Security Planning and Protection Consultant – Level 3: Reliability Status (Workstream 2) 	<p align="center">SECURITY INFORMATION</p>	
	Name of individual as it appears on security clearance application form	
	Level of security clearance obtained	
	Validity period of security clearance obtained	
	Security Screening Certificate and Briefing Form file number	
<p>Workstream covered by this bid: Bidders should indicate which Workstream they are proposing to supply in this bid (If the bidder has submitted bid for one or more Workstreams, please only indicate the Workstream covered by this bid).</p>	Workstream	Yes/No
	Workstream 1	
	Workstream 2	
<p>On behalf of the Bidder, by signing below, I confirm that I have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and I certify that:</p> <ol style="list-style-type: none"> The Bidder considers itself and its proposed resources able to meet all the mandatory requirements described in the bid solicitation; This bid is valid for the period requested in the bid solicitation; All the information provided in the bid is complete, true and accurate; and If the Bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation. 		
<p>Signature of Authorized Representative of Bidder</p>		

ATTACHMENT 2
BID EVALUATION CRITERIA – MANDATORY REQUIREMENTS

(SEE DOCUMENT ATTACHED)

ATTACHMENT 3
BID EVALUATION CRITERIA – RATED REQUIREMENTS

(SEE DOCUMENT ATTACHED)

**ATTACHMENT 4
PRICING SCHEDULE**

WORKSTREAM 1

INITIAL CONTRACT PERIOD (2 YEARS)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 – Application/Software Architect	LEVEL 3	
A.6 – Programmer/Software Developer	LEVEL 2	80% of level 3
A.6 – Programmer/Software Developer	LEVEL 3	
A.8 – System Analyst	LEVEL 3	
A.13. Web Designer	LEVEL 2	
I.7 – Platform Analyst	LEVEL 3	
I.11 – Technology Architect	LEVEL 3	
B.1 – Business Analyst	LEVEL 3	
B.6 – Business System Analyst	LEVEL 2	80% of level 3
B.6 – Business System Analyst	LEVEL 3	
B.14 Technical Writer	LEVEL 2	80% of level 3
B.14 Technical Writer	LEVEL 3	
P.5 – Project Executive	LEVEL 3	

OPTION YEAR 1 (1 YEAR)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 – Application/Software Architect	LEVEL 3	
A.6 – Programmer/Software Developer	LEVEL 2	80% of level 3
A.6 – Programmer/Software Developer	LEVEL 3	
A.8 – System Analyst	LEVEL 3	
A.13. Web Designer	LEVEL 2	
I.7 – Platform Analyst	LEVEL 3	
I.11 – Technology Architect	LEVEL 3	
B.1 – Business Analyst	LEVEL 3	
B.6 – Business System Analyst	LEVEL 2	80% of level 3
B.6 – Business System Analyst	LEVEL 3	
B.14 Technical Writer	LEVEL 2	80% of level 3
B.14 Technical Writer	LEVEL 3	
P.5 – Project Executive	LEVEL 3	

OPTION YEAR 2 (1 YEAR)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 – Application/Software Architect	LEVEL 3	
A.6 – Programmer/Software Developer	LEVEL 2	80% of level 3
A.6 – Programmer/Software Developer	LEVEL 3	
A.8 – System Analyst	LEVEL 3	
A.13. Web Designer	LEVEL 2	
I.7 – Platform Analyst	LEVEL 3	
I.11 – Technology Architect	LEVEL 3	
B.1 – Business Analyst	LEVEL 3	
B.6 – Business System Analyst	LEVEL 2	80% of level 3
B.6 – Business System Analyst	LEVEL 3	
B.14 Technical Writer	LEVEL 2	80% of level 3
B.14 Technical Writer	LEVEL 3	
P.5 – Project Executive	LEVEL 3	

OPTION YEAR 3 (1 YEAR)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 – Application/Software Architect	LEVEL 3	
A.6 – Programmer/Software Developer	LEVEL 2	80% of level 3
A.6 – Programmer/Software Developer	LEVEL 3	
A.8 – System Analyst	LEVEL 3	
A.13. Web Designer	LEVEL 2	
I.7 – Platform Analyst	LEVEL 3	
I.11 – Technology Architect	LEVEL 3	
B.1 – Business Analyst	LEVEL 3	
B.6 – Business System Analyst	LEVEL 2	80% of level 3
B.6 – Business System Analyst	LEVEL 3	
B.14 Technical Writer	LEVEL 2	80% of level 3
B.14 Technical Writer	LEVEL 3	
P.5 – Project Executive	LEVEL 3	

WORKSTREAM 2

INITIAL CONTRACT PERIOD (2 YEARS)		
Resource Category	Level of Expertise	Firm Per Diem Rate
C.1 – Strategic Information Technology Security Planning and Protection Consultant	LEVEL 3	

OPTION YEAR 1 (1 YEAR)		
Resource Category	Level of Expertise	Firm Per Diem Rate
C.1 – Strategic Information Technology Security Planning and Protection Consultant	LEVEL 3	

OPTION YEAR 2 (1 YEAR)		
Resource Category	Level of Expertise	Firm Per Diem Rate
C.1 – Strategic Information Technology Security Planning and Protection Consultant	LEVEL 3	

OPTION YEAR 3 (1 YEAR)		
Resource Category	Level of Expertise	Firm Per Diem Rate
C.1 – Strategic Information Technology Security Planning and Protection Consultant	LEVEL 3	

ATTACHMENT 5

ELECTRONIC PAYMENT INSTRUMENTS

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

- VISA Acquisition Card;
- MasterCard Acquisition Card;
- Direct Deposit (Domestic and International);
- Electronic Data Interchange (EDI);
- Wire Transfer (International Only);
- Large Value Transfer System (LVTS) (Over \$25M)

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria. There are several steps in the evaluation process, which are described below. Even though the evaluation and selection will be conducted in steps, the fact that Canada has proceeded to a later step does not mean that Canada has conclusively determined that the Bidder has successfully passed all the previous steps. Canada may conduct steps of the evaluation in parallel.
- (b) An evaluation team composed of representatives of the Client and PWGSC will evaluate the bids on behalf of Canada. Canada may hire any independent consultant, or use any Government resources, to evaluate any bid. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.
- (c) The evaluation team will determine first if there are two or more bids with a valid Canadian Content certification. In that event, the evaluation process will be limited to the bids with the certification; otherwise, all bids will be evaluated. If some of the bids with a valid certification are declared non-responsive, or are withdrawn, and less than two responsive bids with a valid certification remain, the evaluation will continue among those bids with a valid certification. If all bids with a valid certification are subsequently declared non-responsive, or are withdrawn, then all the other bids received will be evaluated.
- (d) In addition to any other time periods established in the bid solicitation:
 - (i) **Requests for Clarifications:** If Canada seeks clarification or verification from the Bidder about its bid, the Bidder will have 2 working days (or a longer period if specified in writing by the Contracting Authority) to provide the necessary information to Canada. Failure to meet this deadline will result in the bid being declared non-responsive.
 - (ii) **Requests for Further Information:** If Canada requires additional information in order to do any of the following pursuant to the Section entitled "Conduct of Evaluation" in 2003, Standard Instructions - Goods or Services - Competitive Requirements:
 - (A) verify any or all information provided by the Bidder in its bid; or
 - (B) contact any or all references supplied by the Bidder (e.g., references named in the résumés of individual resources) to verify and validate any information submitted by the Bidder,the Bidder must provide the information requested by Canada within 3 working days of a request by the Contracting Authority.
 - (iii) **Extension of Time:** If additional time is required by the Bidder, the Contracting Authority may grant an extension in his or her sole discretion.

4.1.1 Phased Bid Compliance Process

4.1.1.1 General

- (a) Canada will conduct the Phased Bid Compliance Process (PBCP) described below for this requirement ONLY if Canada receives four or fewer Bids by the bid solicitation closing date.
- (b) Notwithstanding any review by Canada at Phase I or II of the PBCP, Bidders are and will remain solely responsible for the accuracy, consistency and completeness of their Bids and Canada does not undertake, by reason of this review, any obligations or responsibility for identifying any or all errors or omissions in Bids or in responses by a Bidder to any communication from Canada.

THE BIDDER ACKNOWLEDGES THAT THE REVIEWS IN PHASE I AND II OF THIS PBCP ARE PRELIMINARY AND DO NOT PRECLUDE A FINDING IN PHASE III THAT THE BID IS

NON-RESPONSIVE, EVEN FOR MANDATORY REQUIREMENTS WHICH WERE SUBJECT TO REVIEW IN PHASE I OR II AND NOTWITHSTANDING THAT THE BID HAD BEEN FOUND RESPONSIVE IN SUCH EARLIER PHASE. CANADA MAY DEEM A BID TO BE NON-RESPONSIVE TO A MANDATORY REQUIREMENT AT ANY PHASE. THE BIDDER ALSO ACKNOWLEDGES THAT ITS RESPONSE TO A NOTICE OR A COMPLIANCE ASSESSMENT REPORT (CAR) (EACH DEFINED BELOW) IN PHASE I OR II MAY NOT BE SUCCESSFUL IN RENDERING ITS BID RESPONSIVE TO THE MANDATORY REQUIREMENTS THAT ARE THE SUBJECT OF THE NOTICE OR CAR, AND MAY RENDER ITS BID NON-RESPONSIVE TO OTHER MANDATORY REQUIREMENTS.

- (c) Canada may, in its discretion, request and accept at any time from a Bidder and consider as part of the Bid, any information to correct errors or deficiencies in the Bid that are clerical or administrative, such as, without limitation, failure to sign the Bid or any part or to checkmark a box in a form, or other failure of format or form or failure to acknowledge; failure to provide a procurement business number or contact information such as names, addresses and telephone numbers; inadvertent errors in numbers or calculations that do not change the amount the Bidder has specified as the price or of any component thereof that is subject to evaluation. This shall not limit Canada's right to request or accept any information after the bid solicitation closing in circumstances where the bid solicitation expressly provides for this right. The Bidder will have the time period specified in writing by Canada to provide the necessary documentation. Failure to meet this deadline will result in the Bid being declared non-responsive.
- (d) The PBCP does not limit Canada's rights under Standard Acquisition Clauses and Conditions (SACC) 2003 (2018-05-22) Standard Instructions – Goods or Services – Competitive Requirements nor Canada's right to request or accept any information during the solicitation period or after bid solicitation closing in circumstances where the bid solicitation expressly provides for this right, or in the circumstances described in subsection (c).
- (e) Canada will send any Notice or CAR by any method Canada chooses, in its absolute discretion. The Bidder must submit its response by the method stipulated in the Notice or CAR. Responses are deemed to be received by Canada at the date and time they are delivered to Canada by the method and at the address specified in the Notice or CAR. An email response permitted by the Notice or CAR is deemed received by Canada on the date and time it is received in Canada's email inbox at Canada's email address specified in the Notice or CAR. A Notice or CAR sent by Canada to the Bidder at any address provided by the Bidder in or pursuant to the Bid is deemed received by the Bidder on the date it is sent by Canada. Canada is not responsible for late receipt by Canada of a response, however caused.

4.1.1.2 Phase I: Financial Bid

- (a) After the closing date and time of this bid solicitation, Canada will examine the Bid to determine whether it includes a Financial Bid and whether any Financial Bid includes all information required by the solicitation. Canada's review in Phase I will be limited to identifying whether any information that is required under the bid solicitation to be included in the Financial Bid is missing from the Financial Bid. This review will not assess whether the Financial Bid meets any standard or is responsive to all solicitation requirements
- (b) Canada's review in Phase I will be performed by officials of the Department of Public Works and Government Services.
- (c) If Canada determines, in its absolute discretion that there is no Financial Bid or that the Financial Bid is missing all of the information required by the bid solicitation to be included in the Financial Bid, then the Bid will be considered non-responsive and will be given no further consideration.
- (d) For Bids other than those described in c), Canada will send a written notice to the Bidder ("Notice") identifying where the Financial Bid is missing information. A Bidder, whose Financial Bid has been found responsive to the requirements that are reviewed at Phase I, will not receive a Notice. Such Bidders shall not be entitled to submit any additional information in

respect of their Financial Bid.

- (e) The Bidders who have been sent a Notice shall have the time period specified in the Notice (the "Remedy Period") to remedy the matters identified in the Notice by providing to Canada, in writing, additional information or clarification in response to the Notice. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the Notice.
- (f) In its response to the Notice, the Bidder will be entitled to remedy only that part of its Financial Bid which is identified in the Notice. For instance, where the Notice states that a required line item has been left blank, only the missing information may be added to the Financial Bid, except that, in those instances where the addition of such information will necessarily result in a change to other calculations previously submitted in its Financial Bid, (for example, the calculation to determine a total price), such necessary adjustments shall be identified by the Bidder and only these adjustments shall be made. All submitted information must comply with the requirements of this solicitation.
- (g) Any other changes to the Financial Bid submitted by the Bidder will be considered to be new information and will be disregarded. There will be no change permitted to any other Section of the Bidder's Bid. Information submitted in accordance with the requirements of this solicitation in response to the Notice will replace, in full, **only** that part of the original Financial Bid as is permitted above, and will be used for the remainder of the bid evaluation process.
- (h) Canada will determine whether the Financial Bid is responsive to the requirements reviewed at Phase I, considering such additional information or clarification as may have been provided by the Bidder in accordance with this Section. If the Financial Bid is not found responsive for the requirements reviewed at Phase I to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.
- (i) Only Bids found responsive to the requirements reviewed in Phase I to the satisfaction of Canada, will receive a Phase II review.

4.1.1.3 Phase II: Technical Bid

- (a) Canada's review at Phase II will be limited to a review of the Technical Bid to identify any instances where the Bidder has failed to meet any Eligible Mandatory Criterion. This review will not assess whether the Technical Bid meets any standard or is responsive to all solicitation requirements. Eligible Mandatory Criteria are all mandatory technical criteria that are identified in this solicitation as being subject to the PBCP. Mandatory technical criteria that are not identified in the solicitation as being subject to the PBCP, will not be evaluated until Phase III.
- (b) Canada will send a written notice to the Bidder (Compliance Assessment Report or "CAR") identifying any Eligible Mandatory Criteria that the Bid has failed to meet. A Bidder whose Bid has been found responsive to the requirements that are reviewed at Phase II will receive a CAR that states that its Bid has been found responsive to the requirements reviewed at Phase II. Such Bidder shall not be entitled to submit any response to the CAR.
- (c) A Bidder shall have the period specified in the CAR (the "Remedy Period") to remedy the failure to meet any Eligible Mandatory Criterion identified in the CAR by providing to Canada in writing additional or different information or clarification in response to the CAR. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the CAR.
- (d) The Bidder's response must address only the Eligible Mandatory Criteria listed in the CAR as not having been achieved, and must include only such information as is necessary to achieve such compliance. Any additional information provided by the Bidder which is not necessary to achieve such compliance will not be considered by Canada, except that, in those instances where such a response to the Eligible Mandatory Criteria specified in the CAR will necessarily result in a consequential change to other parts of the Bid, the Bidder

shall identify such additional changes, provided that its response must not include any change to the Financial Bid.

- (e) The Bidder's response to the CAR should identify in each case the Eligible Mandatory Criterion in the CAR to which it is responding, including identifying in the corresponding section of the original Bid, the wording of the proposed change to that section, and the wording and location in the Bid of any other consequential changes that necessarily result from such change. In respect of any such consequential change, the Bidder must include a rationale explaining why such consequential change is a necessary result of the change proposed to meet the Eligible Mandatory Criterion. It is not up to Canada to revise the Bidder's Bid, and failure of the Bidder to do so in accordance with this subparagraph is at the Bidder's own risk. All submitted information must comply with the requirements of this solicitation.
- (f) Any changes to the Bid submitted by the Bidder other than as permitted in this solicitation, will be considered to be new information and will be disregarded. Information submitted in accordance with the requirements of this solicitation in response to the CAR will replace, in full, **only** that part of the original Bid as is permitted in this Section.
- (g) Additional or different information submitted during Phase II permitted by this section will be considered as included in the Bid, but will be considered by Canada in the evaluation of the Bid at Phase II only for the purpose of determining whether the Bid meets the Eligible Mandatory Criteria. It will not be used at any Phase of the evaluation to increase or decrease any score that the original Bid would achieve without the benefit of such additional or different information. For instance, an Eligible Mandatory Criterion that requires a mandatory minimum number of points to achieve compliance will be assessed at Phase II to determine whether such mandatory minimum score would be achieved with such additional or different information submitted by the Bidder in response to the CAR. If so, the Bid will be considered responsive in respect of such Eligible Mandatory Criterion, and the additional or different information submitted by the Bidder shall bind the Bidder as part of its Bid, but the Bidder's original score, which was less than the mandatory minimum for such Eligible Mandatory Criterion, will not change, and it will be that original score that is used to calculate any score for the Bid.
- (h) Canada will determine whether the Bid is responsive for the requirements reviewed at Phase II, considering such additional or different information or clarification as may have been provided by the Bidder in accordance with this Section. If the Bid is not found responsive for the requirements reviewed at Phase II to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.
- (i) Only Bids found responsive to the requirements reviewed in Phase II to the satisfaction of Canada, will receive a Phase III evaluation.

4.1.1.4 Phase III: Final Evaluation of the Bid

- (a) In Phase III, Canada will complete the evaluation of all Bids found responsive to the requirements reviewed at Phase II. Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) A Bid is non-responsive and will receive no further consideration if it does not meet all mandatory evaluation criteria of the solicitation.

4.2 Technical Evaluation

A separate technical evaluation will be conducted for each Workstream.

(a) Mandatory Technical Criteria:

- (i) Each bid will be reviewed for compliance with the mandatory requirements of the bid solicitation. Any element of the bid solicitation that is identified specifically with the words

"must" or "mandatory" is a mandatory requirement. Bids that do not comply with each and every mandatory requirement will be declared non-responsive and be disqualified.

- (ii) The mandatory technical criteria are described in Attachment "2".
- (iii) If the Phased Bid Compliance Process applies, it will apply only to mandatory technical criteria identified by the superscript (^{PB}). Mandatory technical criteria not identified by the superscript (^{PB}) will not be subject to the Phased Bid Compliance Process.

(b) **Point-Rated Technical Criteria:**

- (i) Each bid will be rated by assigning a score to the rated requirements, which are identified in the bid solicitation by the word "rated" or by reference to a score. Bidders who fail to submit complete bids with all the information requested by this bid solicitation will be rated accordingly.
- (ii) The rated requirements are described in Attachment "3".

(c) **Number of Resources Evaluated:**

Only a certain number of resources per Resource Category will be evaluated as part of this bid solicitation as identified in Attachment "2". Additional Resources will only be assessed after contract award once specific tasks are requested of the Contractor. After contract award, the Task Authorization process will be in accordance with Part 7 – Resulting Contract Clauses, the Article titled "Task Authorization". When a Task Authorization Form (TA Form) is issued, the Contractor will be requested to propose a resource to satisfy the specific requirement based on the TA Form's Statement of Work. The proposed resource will then be assessed against the criteria identified in the Contract's Statement of Work in accordance with Appendix C of Annex A.

(d) **Reference Checks:**

- (i) Whether or not to conduct reference checks is discretionary. However, if PWGSC chooses to conduct reference checks for any given rated or mandatory requirement, it will check the references for that requirement for all bidders who have not, at that point, been found non-responsive.
- (ii) For reference checks, Canada will conduct the reference check in writing by email. Canada will send all email reference check requests to contacts supplied by all the Bidders on the same day using the email address provided in the bid. Canada will not award any points and/or a bidder will not meet the mandatory experience requirement (as applicable) unless the response is received within 5 working days of the date that Canada's email was sent.
- (iii) On the third working day after sending out the reference check request, if Canada has not received a response, Canada will notify the Bidder by email, to allow the Bidder to contact its reference directly to ensure that it responds to Canada within 5 working days. If the individual named by a Bidder is unavailable when required during the evaluation period, the Bidder may provide the name and email address of an alternate contact person from the same customer. Bidders will only be provided with this opportunity once for each customer, and only if the originally named individual is unavailable to respond (i.e., the Bidder will not be provided with an opportunity to submit the name of an alternate contact person if the original contact person indicates that he or she is unwilling or unable to respond). The Bidder will have 1 working day to submit the name of a new contact. That contact will again be given 5 working days to respond once Canada sends its reference check request.
- (iv) Wherever information provided by a reference differs from the information supplied by the Bidder, the information supplied by the reference will be the information evaluated.
- (v) Points will not be allocated and/or a bidder will not meet the mandatory experience requirement (as applicable) if (1) the reference customer states he or she is unable or unwilling to provide the information requested, or (2) the customer reference is not a

customer of the Bidder itself (for example, the customer cannot be the customer of an affiliate of the Bidder instead of being a customer of the Bidder itself). Nor will points be allocated or a mandatory met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Bidder.

4.3 Financial Evaluation

- (a) The financial evaluation will be conducted using the firm per diem rates provided by the responsive bid(s). A separate financial evaluation will be conducted for each Workstream.
- (b) There are two possible financial evaluation methods for this requirement. The first method will be used if three or more bids are determined responsive (see (c) Financial Evaluation - Method A below). The second method will be used if fewer than three bids are determined responsive (see (d) Financial Evaluation - Method B below).
- (c) **Financial Evaluation - Method A:** The following financial evaluation method will be used if three or more bids are determined responsive:
 - (i) **STEP 1 - ESTABLISHING THE LOWER AND UPPER MEDIAN BAND LIMITS FOR EACH PERIOD AND EACH RESOURCE CATEGORY:** The Contracting Authority will establish, for each period and each Resource Category of each Workstream, the median band limits based on the firm per diem rates provided by the technically responsive bids. For each such Resource Category the median will be calculated using the median function in Microsoft Excel and will represent a range that encompasses any rate to a value of minus (-) 10% of the median, and an upper median rate to a value of plus (+) 30% of the median. When an even number of technically responsive bids have been determined, an average of the middle two rates will be used to calculate the median band limits and for an odd number of technically responsive bids, the middle rate will be used.
 - (ii) **STEP 2 - POINTS ALLOCATION:** For each period and each Resource Category of each Workstream points will be allocated as follows:
 - (A) A Bidder's proposed firm per diem rate that is either lower than the established lower median band limit or higher than the established upper median band limit for that period and Resource Category will be allocated 0 points.
 - (B) A Bidder's proposed firm per diem rate falling within the upper and lower median band limits, for that period and Resource Category, will be allocated points using the following calculation, which will be rounded to two decimal places:

$$\frac{\text{Lowest proposed firm per diem rate within the median band limits}}{\text{Bidder's proposed firm per diem rate within the median band limits}} \times \text{Maximum Points Assigned at Table 1 below}$$
 - (C) A Bidder's proposed firm per diem rate falling within the established median band limits which is the lowest proposed firm per diem rate will be allocated the applicable maximum points assigned at Table 1 below.

TABLE 1 - MAXIMUM POINTS ASSIGNED						
WORKSTREAM 1						
RESOURCE CATEGORIES	LEVEL OF EXPERTISE	INITIAL CONTRACT PERIOD (2 YEARS)	OPTION PERIOD 1 (1 YEAR)	OPTION PERIOD 2 (1 YEAR)	OPTION PERIOD 3 (1 YEAR)	TOTAL POINTS
A.1 – Application/Software Architect	LEVEL 3	100	50	50	50	250

A.6 – Programmer/Software Developer	LEVEL 2	100	50	50	50	250
A.6 – Programmer/Software Developer	LEVEL 3	100	50	50	50	250
A.8 – System Analyst	LEVEL 3	100	50	50	50	250
A.13 – Web Designer	LEVEL 2	100	50	50	50	250
I.7 – Platform Analyst	LEVEL 3	100	50	50	50	250
I.11 – Technology Architect	LEVEL 3	100	50	50	50	250
B.1 – Business Analyst	LEVEL 3	100	50	50	50	250
B.6 – Business System Analyst	LEVEL 2	100	50	50	50	250
B.6 – Business System Analyst	LEVEL 3	100	50	50	50	250
B.14 – Technical Writer	LEVEL 2	100	50	50	50	250
B.14 – Technical Writer	LEVEL 3	100	50	50	50	250
P.5 – Project Executive	LEVEL 3	100	50	50	50	250
TOTAL – WORKSTREAM 1		1300	650	650	650	3250
WORKSTREAM 2						
RESOURCE CATEGORIES	LEVEL OF EXPERTISE	INITIAL CONTRACT PERIOD (2 YEARS)	OPTION PERIOD 1 (1 YEAR)	OPTION PERIOD 2 (1 YEAR)	OPTION PERIOD 3 (1 YEAR)	TOTAL POINTS
C.1 – Strategic Information Technology Security Planning and Protection Consultant	LEVEL 3	100	50	50	50	250
TOTAL – WORKSTREAM 2		100	50	50	50	250

- (iii) **STEP 3 - FINANCIAL SCORE:** Points allocated under STEP 2 for each period and Resource Category of each Workstream will be added together and rounded to two decimal places to produce the Financial Score. Bidders will find below an example of a financial evaluation using Method A.

(iv) **EXAMPLE OF A FINANCIAL EVALUATION USING METHOD A**

TABLE 2 - EXAMPLE OF A FINANCIAL EVALUATION USING METHOD A:							
Resource Category	Max. Points	Bidder 1		Bidder 2		Bidder 3	
		Year 1	Year 2	Year 1	Year 2	Year 1	Year 2
Programmer	150 (75 pts. per year)	\$400.00	\$400.00	\$420.00	\$450.00	\$450.00	\$450.00
Business Analyst	100 (50 pts. per year)	\$600.00	\$600.00	\$600.00	\$620.00	\$650.00	\$820.00
Project Manager	50 (25 pts. per year)	\$555.00	\$900.00	\$750.00	\$800.00	\$700.00	\$800.00

TOTAL	300
STEP 1 - Establishing the lower and upper median band limits for each year and each resource category	
(Median 1)	For the Programmer Resource Category, the year 1 median would be \$420.00. The lower median band limit would be \$336.00 and higher median band limit would be \$546.00.
(Median 2)	For the Programmer Resource Category, the year 2 median would be \$450.00. The lower median band limit would be \$360.00 and higher median band limit would be \$585.00.
(Median 3)	For the Business Analyst Resource Category, the year 1 median would be \$600.00. The lower median band limit would be \$480.00 and higher median band limit would be \$780.00.
(Median 4)	For the Business Analyst Resource Category, the year 2 median would be \$620.00. The lower median band limit would be \$496.00 and higher median band limit would be \$806.00.
(Median 5)	For the Project Manager Resource Category, the year 1 median would be \$700.00. The lower median band limit would be \$560.00 and higher median band limit would be \$910.00.
(Median 6)	For the Project Manager Resource Category, the year 2 median would be \$800.00. The lower median band limit would be \$640.00 and higher median band limit would be \$1,040.00.
STEP 2 - Points Allocation:	
Bidder 1:	
Programmer Year 1 =	75 points (lowest rate within the lower and upper median band limits)
Programmer Year 2 =	75 points (lowest rate within the lower and upper median band limits)
Business Analyst Year 1 =	50 points (lowest rate within the lower and upper median band limits)
Business Analyst Year 2 =	50 points (lowest rate within the lower and upper median band limits)
Project Manager Year 1 =	0 points (outside the lower and higher median band limits)
Project Manager Year 2 =	22.22 points (based on the following calculation = (Lowest rate of \$800.00 / Bidder's proposed rate of \$900.00) Multiplied by 25 pts)
Bidder 2:	
Programmer Year 1 =	71.43 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$420.00) Multiplied by 75 pts)
Programmer Year 2 =	66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
Business Analyst Year 1 =	50 points (lowest price within the lower and upper median band limits)
Business Analyst Year 2 =	48.39 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$620.00) Multiplied by 50 pts)
Project Manager Year 1 =	23.33 points (based on the following calculation = (Lowest rate of \$700.00 / Bidder's proposed rate of \$750.00) Multiplied by 25 pts)
Project Manager Year 2 =	25 points (lowest price within the lower and upper median band limits)
Bidder 3:	
Programmer Year 1 =	66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
Programmer Year 2 =	66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
Business Analyst Year 1 =	46.15 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$650.00) Multiplied by 75 pts)
Business Analyst Year 2 =	0 points (outside the lower and higher median band limits)
Project Manager Year 1 =	25 points (lowest price within the lower and upper median band limits)
Project Manager Year 2 =	25 points (lowest price within the lower and upper median band limits)
STEP 3 - Financial Score:	

Bidder 1:	$75 + 75 + 50 + 50 + 0 + 22.22 =$ Total Financial Score of 272.22 points out of a possible 300 points
Bidder 2:	$71.43 + 67.67 + 50 + 48.39 + 23.33 + 25 =$ Total Financial Score of 284.82 points out of a possible 300 points
Bidder 3:	$66.67 + 66.67 + 46.15 + 0 + 25 + 25 =$ Total Financial Score of 229.49 points out of a possible 300 points

(d) **Financial Evaluation - Method B:** The following financial evaluation method will be used if less than three bids are determined responsive:

(i) **STEP 1 - POINTS ALLOCATION:** For each period and each Resource Category of each Workstream points will be allocated as follows:

(A) Points will be established based on the following calculation, with points rounded to two decimal places:

$$\frac{\text{Lowest proposed firm per diem rate}}{\text{Bidder's proposed firm per diem rate}} \times \text{Maximum Points Assigned at Table 3 below}$$

The Bidder with the lowest proposed firm per diem rate will be allocated the applicable maximum points assigned at Table 3 below.

TABLE 3 - MAXIMUM POINTS ASSIGNED						
WORKSTREAM 1						
RESOURCE CATEGORIES	LEVEL OF EXPERTISE	INITIAL CONTRACT PERIOD (2 YEARS)	OPTION PERIOD 1 (1 YEAR)	OPTION PERIOD 2 (1 YEAR)	OPTION PERIOD 3 (1 YEAR)	TOTAL POINTS
A.1 – Application/Software Architect	LEVEL 3	100	50	50	50	250
A.6 – Programmer/Software Developer	LEVEL 2	100	50	50	50	250
A.6 – Programmer/Software Developer	LEVEL 3	100	50	50	50	250
A.8 – System Analyst	LEVEL 3	100	50	50	50	250
A.13 – Web Designer	LEVEL 2	100	50	50	50	250
I.7 – Platform Analyst	LEVEL 3	100	50	50	50	250
I.11 – Technology Architect	LEVEL 3	100	50	50	50	250
B.1 – Business Analyst	LEVEL 3	100	50	50	50	250
B.6 – Business System Analyst	LEVEL 2	100	50	50	50	250
B.6 – Business System Analyst	LEVEL 3	100	50	50	50	250
B.14 – Technical Writer	LEVEL 2	100	50	50	50	250
B.14 – Technical Writer	LEVEL 3	100	50	50	50	250
P.5 – Project Executive	LEVEL 3	100	50	50	50	250

TOTAL – WORKSTREAM 1		1300	650	650	650	3250
WORKSTREAM 2						
RESOURCE CATEGORIES	LEVEL OF EXPERTISE	INITIAL CONTRACT PERIOD (2 YEARS)	OPTION PERIOD 1 (1 YEAR)	OPTION PERIOD 2 (1 YEAR)	OPTION PERIOD 3 (1 YEAR)	TOTAL POINTS
C.1 – Strategic Information Technology Security Planning and Protection Consultant	LEVEL 3	100	50	50	50	250
TOTAL – WORKSTREAM 2		100	50	50	50	250

- (ii) **STEP 2 - FINANCIAL SCORE:** Points allocated under STEP 1, for each period and each Resource Category, will be added together and rounded to two decimal places to produce the Financial Score.

(e) Substantiation of Professional Services Rates

In Canada's experience, bidders will from time to time propose rates at the time of bidding for one or more categories of resources that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. When evaluating the rates bid for professional services, Canada may, but will have no obligation to, require price support in accordance with this Article. If Canada requests price support, it will be requested from all otherwise responsive bidders who have proposed a rate that is at least 20% lower than the median rate bid by all responsive bidders for the relevant resource category or categories. If Canada requests price support, the Bidder must provide the following information:

- (i) an invoice (referencing a contract serial number or other unique contract identifier) that shows that the Bidder has provided and invoiced a customer (with whom the Bidder deals at arm's length) for services performed for that customer similar to the services that would be provided in the National Capital Region in the relevant resource category, where those services were provided for at least three months within the eighteen months before the bid solicitation closing date, and the fees charged were equal to or less than the rate offered to Canada;
- (ii) in relation to the invoice in (i), evidence from the Bidder's customer that the services identified in the invoice include at least 50% of the tasks listed in the Statement of Work for the category of resource being assessed for an unreasonably low rate. This evidence must consist of either a copy of the contract (which must describe the services to be provided and demonstrate that at least 50% of the tasks to be performed are the same as those to be performed under the Statement of Work in this bid solicitation) or the customer's signed certification that the services subject to the charges in the invoice included at least 50% of the same tasks to be performed under the Statement of Work in this bid solicitation; and
- (iii) the name, telephone number and, if available, e-mail address of a contact person at the customer who received each invoice submitted under (i), so that Canada may verify any information provided by the Bidder.

Once Canada requests substantiation of the rates bid for any resource category, it is the sole responsibility of the Bidder to submit information (as described above and as otherwise may be requested by Canada, including information that would allow Canada to verify information with the resource proposed) that will allow Canada to determine whether it can rely, with confidence, on the Bidder's ability to provide the required services at the rates bid. If Canada determines that the information provided by the Bidder does not adequately substantiate the unreasonably low rates, the bid will be declared non-responsive.

(f) Formulae in Pricing Tables

If the pricing tables provided to bidders include any formulae, Canada may re-input the prices provided by bidders into a fresh table, if Canada believes that the formulae may no longer be functioning properly in the version submitted by a bidder.

4.4 Basis of Selection

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

(a) Evaluation of Bid – Multiple Contracts Awarded for Multiple Workstreams

Selection Process: The following selection process will be conducted for each Workstream:

(i) A bid must comply with the requirements of the bid solicitation, meet all mandatory evaluation criteria and obtain the required pass marks for the point rated criteria identified in this bid solicitation to be declared responsive.

(ii) The responsive bid that obtains the highest Total Bidder Score will be recommended for award of a contract. For any given Bidder, the greatest possible Total Technical Score is 70 while the greatest possible Total Financial Score is 30.

(A) Calculation of Total Technical Score: For each Workstream the Total Technical Score will be computed for each responsive bid by converting the Technical Score obtained for the point-rated technical criteria using the following formula, rounded to two decimal places:

$$\frac{\text{Technical Score}}{\text{Maximum Technical Points (Bidders, please refer to the maximum technical points for each Workstream at Attachment "3")}} \times 70 = \text{Total Technical Score}$$

(B) Calculation of Total Financial Score: For each Workstream the Total Financial Score will be computed for each responsive bid by converting the Financial Score obtained for the financial evaluation using the following formula rounded to two decimal places:

$$\frac{\text{Financial Score}}{\text{Total Maximum Points Assigned (Bidders, please refer to the total maximum points assigned for each Workstream)}} \times 30 = \text{Total Financial Score}$$

(C) Calculation of the Total Bidder Score: For each Workstream the Total Bidder Score will be computed for each responsive bid in accordance with the following formula:

$$\text{Total Technical Score} + \text{Total Financial Score} = \text{Total Bidder Score}$$

(iii) In the event of identical Total Bidder Scores occurring within a given Workstream, then the bid with the highest Total Technical Score will become the top-ranked bidder.

(b) Contract Funding Allocation: Where for a Workstream more than one contract is awarded, each contract issued for that particular Workstream will be issued with an amount of funding specified in the article titled "Limitation of Expenditure" calculated based on the following:

(i) when one contract is awarded, the amount of the Limitation of Expenditure will be determined at Canada's discretion;

(ii) where two contracts are awarded, the amount of the Limitation of Expenditure of each contract will be determined in accordance with the following:

- (A) the Bidder with the highest Total Bidder Score will receive 55% of the funding initially allocated for that Workstream; and
 - (B) the Bidder with the next highest Total Bidder Score will receive 45% of the funding initially allocated for that Workstream.
- (c) Bidders should note that all contract awards are subject to Canada's internal approvals process, which includes a requirement to approve funding in the amount of any proposed contract. Despite the fact that the Bidder may have been recommended for contract award, a contract will only be awarded if internal approval is granted according to Canada's internal policies. If approval is not granted, no contract will be awarded.

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Bidders must provide the required certifications and additional information to be awarded a contract.

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

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

5.1 Certifications Precedent to Contract Award and Additional Information

The certifications and additional information listed below should be submitted with the bid, but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame provided will render the bid non-responsive.

(a) Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "[FCP Limited Eligibility to Bid](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html)" list available at the bottom of the page of the Employment and Social Development Canada (ESDC) - Labour's website. (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html>).

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html)" list at the time of contract award.

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html)" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed Attachment "6", Federal Contractors Program for Employment Equity - Certification, before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed Attachment Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

(b) Additional Certifications Precedent to Contract Award

(i) Canadian Content Certification

(A) This procurement is conditionally limited to Canadian services.

Subject to the evaluation procedures contained in the bid solicitation, bidders acknowledge that only bids with a certification that the service offered is a Canadian service, as defined in clause [A3050T](#), may be considered.

Failure to provide the certification completed attached as Attachment "7" with the bid will result in the services offered being treated as a non-Canadian service.

(B) SACC Manual Clause A3050T (2018-12-06) Canadian Content Definition

(ii) **Set-aside for Aboriginal Business**

- (A) This procurement is set aside for Aboriginal business under the federal government Set-aside Program for Aboriginal Business. Bidders must complete and sign the certification entitled "Certification Requirements for the Set-aside Program for Aboriginal Business" attached as Attachment "8" Set-Aside for Aboriginal Business - Certification.
- (B) By executing the certification, the Bidder warrants that it is an Aboriginal business as defined in the Set-aside Program for Aboriginal Business.
- (C) SACC Manual clause A3001T (2014-11-27) applies.

(c) **Professional Services Resources**

- (i) By submitting a bid, the Bidder certifies that, if it is awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives.
- (ii) By submitting a bid, the Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.
- (iii) If a Bidder has proposed any individual who is not an employee of the Bidder, by submitting a bid, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

(d) **Certification of Language – English Essential**

By submitting a bid, the Bidder certifies that, should it be awarded a contract as result of the bid solicitation, every individual proposed in its bid will be fluent in English. The individual(s) proposed must be able to communicate orally and in writing in English without any assistance and with minimal errors.

(e) **Submission of Only One Bid**

By submitting a bid, the Bidder is certifying that it does not consider itself to be related to any other bidder.

ATTACHMENT 6
**FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY -
CERTIFICATION**

I, the Bidder, by submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated below. The certifications provided to Canada are subject to verification at all times. I understand that Canada will declare a bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with any request or requirement imposed by Canada may render the bid non-responsive or constitute a default under the Contract.

For further information on the Federal Contractors Program for Employment Equity visit [Employment and Social Development Canada \(ESDC\) - Labour's](#) website.

Date: _____ (YYYY/MM/DD) (If left blank, the date will be deemed to be the bid solicitation closing date.)

Complete both A and B.

A. Check only one of the following:

- A1. The Bidder certifies having no work force in Canada.
- A2. The Bidder certifies being a public sector employer.
- A3. The Bidder certifies being a federally regulated employer being subject to the [Employment Equity Act](#).
- A4. The Bidder certifies having a combined work force in Canada of less than 100 permanent full-time and/or permanent part-time employees.
- A5. The Bidder has a combined workforce in Canada of 100 or more employees; and
- A5.1 The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with ESDC-Labour.

OR

- A5.2 The Bidder certifies having submitted the Agreement to Implement Employment Equity (LAB1168) to ESDC-Labour. As this is a condition to contract award, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC-Labour.

B. Check only one of the following:

- B1. The Bidder is not a Joint Venture.

OR

- B2. The Bidder is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification. (Refer to the Joint Venture section of the Standard Instructions).

ATTACHMENT 7

CANADIAN CONTENT CERTIFICATION

Canadian Content Certification	
As described in the solicitation, bids with at least 80% Canadian content are being given a preference. For the definition of Canadian services, consult the PWGSC SACC clause A3050T.	
On behalf of the bidder, by signing below, I confirm that [<i>check the box that applies</i>]:	
At least 80 percent of the total bid price consists of Canadian services (as defined in the solicitation)	
Less than 80 percent of the total bid price consists of Canadian services (as defined in the solicitation)	
Name of the Authorized Representative of Bidder: _____	
Signature of the Authorized Representative of Bidder: _____	
Solicitation Number: _____	

ATTACHMENT 8

SET-ASIDE FOR ABORIGINAL BUSINESS - CERTIFICATION

1. This procurement is set aside under the federal government Procurement Strategy for Aboriginal Business. For more information on Aboriginal business requirements of the Set-aside Program for Aboriginal Business, see Annex 9.4, Supply Manual.
2. The Bidder:
 - i. certifies that it meets, and will continue to meet throughout the duration of any resulting contract, the requirements described in the above-mentioned annex;
 - ii. agrees that any subcontractor it engages under any resulting contract must satisfy the requirements described in the above-mentioned annex; and
 - iii. agrees to provide to Canada, immediately upon request, evidence supporting any subcontractor's compliance with the requirements described in the above-mentioned annex.
3. The Bidder must check the applicable box below:
 - i. The Bidder is an Aboriginal business that is a sole proprietorship, band, limited company, co-operative, partnership or not-for-profit organization.

OR
 - ii. The Bidder is either a joint venture consisting of two or more Aboriginal businesses or a joint venture between an Aboriginal business and a non-Aboriginal business.
4. The Bidder must check the applicable box below:
 - i. The Aboriginal business has fewer than six full-time employees.

OR
 - ii. The Aboriginal business has six or more full-time employees.
5. The Bidder must, upon request by Canada, provide all information and evidence supporting this certification. The Bidder must ensure that this evidence will be available for audit during normal business hours by a representative of Canada, who may make copies and take extracts from the evidence. The Bidder must provide all reasonably required facilities for any audits.
6. By submitting a bid, the Bidder certifies that the information submitted by the Bidder in response to the above requirements is accurate and complete.

I, _____ am an owner and/or full-time employee of _____.
(NAME) (NAME OF BUSINESS)

Signature

Date

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirement

- (a) Before award of a contract, the following conditions must be met:
- (i) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses; and
 - (ii) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses.
- (b) Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful Bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.
- (c) For additional information on security requirements, Bidders should refer to the Contract Security Program of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.
- (d) In the case of a joint venture bidder, each member of the joint venture must meet the security requirements.
- (e) **Additional CBSA Security Requirement:**
- (i) The CBSA, will conduct its own personnel Reliability Status assessment on the recommended Bidder* and its personnel as per the Treasury Board Secretariat of Canada's (TBS) "Security and Contracting Management Standard" and the Policy on Government Security – Personnel Security Standard, irrespective of whether such assessment has already been conducted under any such policies. The Reliability Status assessment conducted by the CBSA will include a credit check performed by an authorized secure official with CBSA's "Personnel Security Screening Section"(PSSS), which is independent of the Public Works and Government Services Canada's (PWGSC), "Canadian Industrial Security Directorate" (CISD) and the "International Industrial Security Directorate" (IISD).
 - (ii) At the request of the Contracting Authority and within a specified timeframe, the Bidder may be required to have each proposed resource submit to fingerprinting and a security check via the CBSA's electronic PSSS portal.
 - (iii) Until the credit check, fingerprinting** (if required) and all other security screening processes required by this Request for Proposal have been completed and the recommended Bidder and its personnel are deemed suitable by the CBSA, no contract will be awarded and the recommended Bidder and its personnel will not be permitted access to Protected / Classified information or assets, and further, will not be permitted to enter sites where such information or assets are kept.
 - (iv) In the event the recommended Bidder and its personnel are not deemed suitable following the security screening process required by the CBSA, the said recommended Bidder's bid will be deemed non-compliant and the next ranked Bidder will be contacted. If only one bid was obtained and the recommended Bidder does not meet the security requirement, then, the Contracting Authority will determine the next steps.
 - (v) *In the case of a joint venture Bidder, each member of the joint venture must meet the security requirements.
 - (vi) **Fees are applicable. Fingerprinting, if required, will be at the Bidder's cost.

6.2 Financial Capability

- (a) SACC Manual clause A9033T (2012-07-16) Financial Capability applies, except that subsection 3 is deleted and replaced with the following: "If the Bidder is a subsidiary of another company, then any financial information required by the Contracting Authority in 1(a) to (f) must be provided by each level of parent company, up to and including the ultimate parent company. The financial information of a parent company does not satisfy the requirement for the provision of the financial information of the Bidder; however, if the Bidder is a subsidiary of a company and, in the normal course of business, the required financial information is not generated separately for the subsidiary, the financial information of the parent company must be provided. If Canada determines that the Bidder is not financially capable but the parent company is, or if Canada is unable to perform a separate assessment of the Bidder's financial capability because its financial information has been combined with its parent's, Canada may, in its sole discretion, award the contract to the Bidder on the condition that the parent company grant a performance guarantee to Canada."
- (b) In the case of a joint venture bidder, each member of the joint venture must meet the financial capability requirements.

PART 7 - RESULTING CONTRACT CLAUSES

Note to Bidders: Any resulting contract would only list the applicable Workstream(s) above that are awarded to the successful bidder(s) in accordance with the evaluation methodology set out in this bid solicitation. If a bidder is selected for award of more than one Workstream, Canada reserves the right to award one contract for all the Workstreams awarded to that bidder.

The following clauses apply to and form part of any contract resulting from the bid solicitation.

7.1 Requirement

- (a) _____ (the "**Contractor**") agrees to supply to the Client the services described in the Contract, including the Statement of Work, in accordance with, and at the prices set out in, the Contract. This includes providing professional services as and when requested by Canada, to one or more locations to be designated by Canada, excluding any locations in areas subject to any of the Comprehensive Land Claims Agreements.
- (b) **Client:** Under the Contract, the "**Client**" is Canada Border Services Agency (CBSA).
- (c) **Reorganization of Client:** The Contractor's obligation to perform the Work will not be affected by (and no additional fees will be payable as a result of) the renaming, reorganization, reconfiguration, or restructuring of any Client. The reorganization, reconfiguration and restructuring of the Client includes the privatization of the Client, its merger with another entity, or its dissolution, where that dissolution is followed by the creation of another entity or entities with mandates similar to the original Client. In connection with any form of reorganization, Canada may designate another department or government body as the Contracting Authority or Project Authority, as required to reflect the new roles and responsibilities associated with the reorganization.
- (d) **Defined Terms:** Words and expressions defined in the General Conditions or Supplemental General Conditions and used in the Contract have the meanings given to them in the General Conditions or Supplemental General Conditions. Any reference to an Identified User in the Supply Arrangement is a reference to the Client. Also, any reference to a "deliverable" or "deliverables" includes all documentation outlined in this Contract. A reference to a "local office" of the Contractor means an office having at least one full time employee that is not a shared resource working at that location.

7.2 Task Authorization

- (a) **As-and-when-requested Task Authorizations:** The Work or a portion of the Work to be performed under the Contract will be on an "as-and-when-requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract. The Contractor must not commence work until a validly issued TA has been issued by Canada and received by the Contractor. The Contractor acknowledges that any work performed before such issuance and receipt will be done at the Contractor's own risk.

Note to Bidders: The following clause will only apply to Workstream 1 and only if more than one contract is being awarded for this Workstream.

- (b) **Allocation of Task Authorizations:** More than one contract has been awarded for this requirement. As a result, the Task Authorizations issued under this series of contracts will be allocated in accordance with the following:
 - (i) At the time this series of contracts was awarded, each contractor was allocated an amount of funding as specified in the Limitation of Expenditure based on the evaluation process described in the bid solicitation that resulted in the award of this series of contracts.

-
- (ii) When a Task Authorization is issued, Canada will use a rotational method to allocate the draft Task Authorizations where the rotation is based on the ranking obtained by the Contractor during the Bid Solicitation.
 - (iii) Canada will send the first TA to the first ranked Contractor and the second TA to the second ranked Contractor. This rotational process will be repeated for each subsequent series of TAs issued by Canada.
 - (iv) The Contractor sent a draft TA will have the time set out further below under the subparagraph entitled "Contractor's Response to Draft Task Authorization" to respond to the Contracting Authority.
 - (v) If the Contractor to whom the draft TA is first sent either fails to respond on time or confirms in writing that it refuses to perform the task, the draft TA will then be forwarded to the next-ranked Contractor. In the event that Canada determines the proposed resource(s) does not meet the minimum experience or other requirements of the categories identified in the draft TA, Canada may, at its entire discretion request that the Contractor propose another resource and the Contractor will have the time set out in the subparagraph "Contractor's Response to Draft Task Authorization" to respond. If the Contractor fails to respond on time or Canada determines that the proposed resource(s) does not meet the minimum experience or other requirements of the categories identified in the draft TA, the draft TA will be forwarded to the next-ranked Contractor.
 - (vi) If the Contractor refuses a TA or fails to submit a valid response, the dollar value of the TA may be subtracted from the dollar value of the Contractor's Contract and may be re-allocated, at the Contracting Authority's sole discretion, in whole or in part, to the other contractors in that same Workstream.
 - (vii) The process of sending out a draft TA will continue until Canada either cancels the requirement for the task or it has been validly issued to one of the contractors. If none of the contractors can perform the task (in accordance with all the terms and conditions of this series of contracts), Canada may acquire the required Work by other means.
 - (viii) Any of the contractors may advise the Project Authority and the Contracting Authority in writing that it is unable to carry out additional tasks as a result of previous commitments under one or more TAs issued under this series of contracts, and no draft TA will be sent to that contractor until that contractor has given notice in writing to the Project Authority and the Contracting Authority that it is again available to perform additional tasks.
 - (ix) If it is found that the allocation process described at part (ii) above has resulted in the award of a disproportionate dollar value of work between the Contractors, the Contractors agree that Canada, in its sole discretion, may deviate from the allocation process and issue TAs in the manner required to re-establish a proportional allocation.
- (c) **Assessment of Resources Proposed at TA Stage:** Processes for issuing, responding to and assessing Task Authorizations are further detailed in Appendices A, B, C and D of Annex A.
- (d) **Form and Content of draft Task Authorization:**
- (i) The Project Authority will provide the Contractor with a description of the task in a draft Task Authorization using the form specified in Annex A.
 - (ii) The draft Task Authorization will contain the details of the activities to be performed, and must also contain the following information:
 - (A) the task number;
 - (B) The date by which the Contractor's response must be received (which will appear in the draft Task Authorization, but not the issued Task Authorization);
 - (C) the categories of resources and the number required;

- (D) a description of the work for the task outlining the activities to be performed and identifying any deliverables (such as reports);
 - (E) the start and completion dates;
 - (F) any option(s) to extend initial end date (if applicable);
 - (G) milestone dates for deliverables and payments (if applicable);
 - (H) the number of person-days of effort required;
 - (I) whether the work requires on-site activities and the location;
 - (J) the language profile of the resources required;
 - (K) the level of security clearance required of resources;
 - (L) the price payable to the Contractor for performing the task, with an indication of whether it is a firm price or a maximum TA price (and, for maximum price task authorizations, the TA must indicate how the final amount payable will be determined; where the TA does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and
 - (M) any other constraints that might affect the completion of the task.
- (e) **Contractor's Response to Draft Task Authorization:** The Contractor must provide to the Project Authority, within 3 working days of receiving the draft Task Authorization (or within any longer time period specified in the draft TA), a quotation with the proposed total price for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract, as well as its corresponding proposed resource(s) in accordance with Appendix A to Annex A of the Contract. The Contractor's quotation must be based on the rates set out in the Contract. The Contractor will not be paid for preparing or providing its response or for providing other information required to prepare and validly issue the TA.
- (f) **Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:**
- (i) To be validly issued, a TA must include the following signatures:
 - (A) for any TA, inclusive of revisions, with a value less than or equal to \$300,000.00 (excluding Applicable Taxes), the TA must be signed by:
 - (1) the Project Authority; and
 - (2) a representative from the Strategic Procurement and Material Management Division (SPMMD) of CBSA.
 - (B) for any TA, inclusive of revisions, with a value greater than this amount, a TA must include the following signatures:
 - (1) the Project Authority; and
 - (2) a representative from the Strategic Procurement and Material Management Division (SPMMD) of CBSA; and
 - (3) the Contracting Authority.

Any TA that does not bear the appropriate signatures is not validly issued by Canada. Any work performed by the Contractor without receiving a validly issued TA is done at the Contractor's own risk. If the Contractor receives a TA that is not appropriately signed, the Contractor must notify the Contracting Authority. By providing written notice to the Contractor, the Contracting Authority may suspend the Client's ability to issue TA's at any

time, or reduce the dollar value threshold described in subarticle (A) above; any suspension or reduction notice is effective upon receipt.

(g) **Periodic Usage Reports:**

(i) The Contractor must compile and maintain records on its provision of services to the federal government under Task Authorizations validly issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "NIL" report. The data must be submitted on a quarterly basis to the Contracting Authority. From time to time, the Contracting Authority may also require an interim report during a reporting period.

(ii) The quarterly periods are defined as follows:

- (A) 1st quarter: April 1 to June 30;
- (B) 2nd quarter: July 1 to September 30;
- (C) 3rd quarter: October 1 to December 31; and
- (D) 4th quarter: January 1 to March 31.

The data must be submitted to the Contracting Authority no later than 15 calendar days after the end of the reporting period.

(iii) Each report must contain the following information for each validly issued TA (as amended):

- (A) the Task Authorization number and the Task Authorization Revision number(s), if applicable;
- (B) a title or a brief description of each authorized task;
- (C) the name, Resource category and level of each resource involved in performing the TA, as applicable;
- (D) the total estimated cost specified in the validly issued TA of each task, exclusive of Applicable Taxes;
- (E) the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
- (F) the start and completion date for each authorized task; and
- (G) the active status of each authorized task, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).

(iv) Each report must also contain the following cumulative information for all the validly issued TA's (as amended):

- (A) the amount, exclusive of Applicable Taxes, specified in the Contract (as last amended, as applicable) as Canada's total liability to the Contractor for all validly issued TA's; and
- (B) the total amount, exclusive of Applicable Taxes, expended to date against all validly issued TA's.

Note to Bidders: *The following clause will only apply to Workstream 1 and only if more than one contract is being awarded for this Workstream.*

(h) **Refusal of Task Authorizations or Submission of a Response which is not Valid:** The Contractor is not required to submit a response to every draft TA sent to it by Canada. However, in addition to Canada's other rights to terminate the Contract, Canada may immediately, and

without further notice, terminate the Contract for default in accordance with the General Conditions if the Contractor in at least three instances has either not responded or has not submitted a valid response when sent a draft TA. For greater clarity, each draft TA, which is identifiable by its task number, will only count as one instance. A valid response is one that is submitted within the required time period and meets all requirements of the draft TA issued, including proposing the required number of resources who each meet the minimum experience and other requirements of the categories identified in the draft TA at pricing not exceeding the rates set out in Annex B.

- (i) **Consolidation of TA's for Administrative Purposes:** The Contract may be amended from time to time to reflect all validly issued Task Authorizations to date, to document the Work performed under those TA's for administrative purposes.

7.3 Minimum Work Guarantee

- (a) In this clause,
- (i) **"Maximum Contract Value"** means the amount specified in the **"Limitation of Expenditure"** clause set out in the Contract; and
- (ii) **"Minimum Contract Value"** means \$20,000.00 (excluding Applicable Taxes).
- (b) Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with sub-article (c), subject to sub-article (d). In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract Period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.
- (c) In the event that Canada does not request work in the amount of the Minimum Contract Value during the Contract Period, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.
- (d) Canada will have no obligation to the Contractor under this article if Canada terminates the entire Contract
- (i) for default;
- (ii) for convenience as a result of any decision or recommendation of a tribunal or court that the contract be cancelled, re-tendered or awarded to another supplier; or
- (iii) for convenience within ten business days of Contract award.

7.4 Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

(a) **General Conditions:**

- (i) 2035 (2018-06-21), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

With respect to Section 30 - Termination for Convenience, of General Conditions 2035, Subsection 04 is deleted and replaced with the following Subsections 04, 05 and 06:

4. The total of the amounts, to which the Contractor is entitled to be paid under this section, together with any amounts paid, due or becoming due to the Contractor must not exceed the Contract Price.
5. Where the Contracting Authority terminates the entire Contract and the Articles of Agreement include a Minimum Work Guarantee, the total amount to be paid to the Contractor under the Contract will not exceed the greater of:

- (a) the total amount the Contractor may be paid under this section, together with any amounts paid, becoming due other than payable under the Minimum Work Guarantee, or due to the Contractor as of the date of termination, or
 - (b) the amount payable under the Minimum Work Guarantee, less any amounts paid, due or otherwise becoming due to the Contractor as of the date of termination.
6. The Contractor will have no claim for damages, compensation, loss of profit, allowance arising out of any termination notice given by Canada under this section except to the extent that this section expressly provides. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.

(b) **Supplemental General Conditions:**

The following Supplemental General Conditions:

- (i) 4002 (2010-08-16), Supplemental General Conditions - Software Development or Modification Services;
- (ii) 4007 (2010-08-16), Supplemental General Conditions - Canada to Own Intellectual Property Rights in Foreground Information;
- (iii) 4008 (2008-12-12), Supplemental General Conditions - Personal Information;

apply to and form part of the Contract.

7.5 Security Requirement

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

- (a) The Contractor must, at all times during the performance of the Contract, hold a valid Facility Security Clearance at the level of SECRET, issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
- (b) The Contractor personnel requiring access to PROTECTED/CLASSIFIED information, assets or sensitive work site(s) must EACH hold a valid personnel security screening at the level of RELIABILITY STATUS, CONFIDENTIAL or SECRET, granted or approved by CISD/PWGSC.
- (c) The Contractor MUST NOT remove any PROTECTED/CLASSIFIED information from the identified work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restriction.
- (d) Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
- (e) The Contractor must comply with the provisions of the:
 - (i) Security Requirements Check List and security guide, attached at Annex C;
 - (ii) Industrial Security Manual (Latest Edition).
- (f) Additional Security Requirement
 - (i) The CBSA, will conduct its own personnel Reliability Status assessment of the Contractor (specifically the Contractor personnel), which is allowed under the Treasury Board Secretariat of Canada's (TBS) "Security and Contracting Management Standard" and the Policy on Government Security – Personnel Security Standard. Reliability Status assessment conducted by the CBSA will include a credit check.
 - (ii) If the Contractor (specifically the Contractor personnel), has already been screened under the TBS Policy on Government Security - Personnel Security Standard, the Contractor

(specifically the Contractor personnel), will still undergo a security screening process to be conducted by the CBSA.

- (iii) The credit check and fingerprinting*, if required, will be performed by an authorized security official with the CBSA's "Personnel Security Screening Section" (PSSS), which is independent of the Public Works and Government Services Canada's (PWGSC), "Canadian and International Industrial Security Directorate" (CIISD).
- (iv) Until the credit check, fingerprinting* (if required) and all other security screening processes required have been completed and the Contractor (specifically the Contractor personnel) is deemed suitable by the CBSA, the Contractor (specifically the Contractor personnel) will not be permitted access to Protected / Classified information or assets, and further, will not be permitted to enter sites where such information or assets are kept.
- (v) *Fees are applicable. Fingerprinting, if required, will be at the Contractor's cost.

7.6 Contract Period

- (a) **Contract Period:** The "**Contract Period**" is the entire period of time during which the Contractor is obliged to perform the Work, which includes:
 - (i) The "**Initial Contract Period**", which begins on the date the Contract is awarded and ends two years later; and
 - (ii) The period during which the Contract is extended, if Canada chooses to exercise any options set out in the Contract.
- (b) **Option to Extend the Contract:**
 - (i) The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to three additional one-year period(s) under the same terms and conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions set out in the Basis of Payment.
 - (ii) Canada may exercise this option at any time by sending a written notice to the Contractor before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced, for administrative purposes only, through a contract amendment.

7.7 Authorities

(a) Contracting Authority

The Contracting Authority for the Contract is:

Name: Francis Lapalme
Title: A/Supply Team Leader
Organization: Public Works and Government Services Canada
Acquisitions Branch
Directorate: Professional Services Procurement Directorate
Address: 10 Wellington Street, Gatineau, Québec
Telephone: 613-858-9912
E-mail address: francis.lapalme@tpsgc-pwgsc.gc.ca

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

(b) Project Authority

The Project Authority for the Contract is:

Name: **[To be determined]**

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

In his/her absence, the Project Authority for the Contract is:

Name: **[To be determined]**
Title: _____
Organization: _____
Address: _____
Telephone: _____
Facsimile: _____
E-mail address: _____

The Project Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Project Authority; however, the Project Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

(c) **Contractor's Representative**

[To be determined]

7.8 Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a Public Service Superannuation Act (PSSA) pension, the Contractor has agreed that this information will be reported on departmental web sites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada.

7.9 Payment

(a) **Basis of Payment**

- (i) **Professional Services provided under a Task Authorization with a Maximum Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor, in arrears, up to the Maximum Price for the TA, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out in Annex B, Basis of Payment, Applicable Taxes extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.
- (ii) **Professional Services provided under a Task Authorization with a Firm Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor the firm price set out in the Task Authorization (based on the firm, all-inclusive per diem rates set out in Annex B), Applicable Taxes extra.
- (iii) **Competitive Award:** The Contractor acknowledges that the Contract has been awarded as a result of a competitive process. No additional charges will be allowed to compensate for errors, oversights, misconceptions or underestimates made by the Contractor when bidding for the Contract.
- (iv) **Contractor's Firm Per Diem Rates:** The Contractor agrees that the rates set out in Annex B remain firm throughout the Contract Period, except as may be provided for in the express terms of the contract. In reference to Article 18(1) of SACC General

Conditions 2035, the Contractor acknowledges that its obligation to provide services in accordance with the firm rates set out in Annex B is unaffected by the application of any existing law or any new law which may come into effect during the Contract Period.

- (v) **Professional Services Rates:** In Canada's experience, bidders from time to time propose rates at the time of bidding for one or more Resource Categories that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. This denies Canada of the benefit of the awarded contract. If the Contractor does not respond or refuses to provide an individual with the qualifications described in the Contract within the time described in the Contract (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole or in part or chooses to exercise any of the rights provided to it under the general conditions, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Corrective Measure Policy (or equivalent) then in effect, which measures may include an assessment that results in conditions applied against the Contractor to be fulfilled before doing further business with Canada, or full debarment of the Contractor from bidding on future requirements.
- (b) **Limitation of Expenditure – Cumulative Total of all Task Authorizations**
- (i) Canada's total liability to the Contractor under the Contract for all validly issued Task Authorizations (TAs), inclusive of any revisions, must not exceed the amount set out on page 1 of the Contract, less any Applicable taxes. With respect to the amount set out on page 1 of the Contract, Customs duties are excluded and Applicable Taxes are included
- (ii) No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
- (iii) The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
- (A) when it is 75 percent committed, or
- (B) 4 months before the contract expiry date, or
- (C) As soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions, whichever comes first.
- (iv) If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Providing this information does not increase Canada's liability.
- (c) **Method of Payment for Task Authorizations with a Maximum Price:** For each Task Authorization validly issued under the Contract that contains a maximum price:
- (i) Canada will pay the Contractor no more frequently than once a month in accordance with the Basis of Payment. The Contractor must submit time sheets for each resource showing the days and hours worked to support the charges claimed in the invoice.
- (ii) Once Canada has paid the maximum TA price, Canada will not be required to make any further payment, but the Contractor must complete all the work described in the TA, all of which is required to be performed for the maximum TA price. If the work described in the TA is completed in less time than anticipated, and the actual time worked (as supported by the time sheets) at the rates set out in the Contract is less than the maximum TA price, Canada is only required to pay for the time spent performing the work related to that TA.
- (d) **Method of Payment for Task Authorizations with a Firm Price - Lump Sum Payment on Completion:** Canada will pay the Contractor upon completion and delivery of all the Work

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

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

Note to Bidders: *If applicable, the Electronic Payment Instrument(s) indicated by the Bidder in Attachment "5" will be included in any resulting contract.*

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

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

- (i) Visa Acquisition Card;
- (ii) MasterCard Acquisition Card;
- (iii) Direct Deposit (Domestic and International);
- (iv) Electronic Data Interchange (EDI);
- (v) Wire Transfer (International Only);
- (vi) Large Value Transfer System (LVTS) (Over \$25M)

(f) **Time Verification**

Time charged and the accuracy of the Contractor's time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contractor must repay any overpayment, at Canada's request.

(g) **Payment Credits**

Note to Bidders: *The following clause will apply to Workstream 2 only.*

(i) **Failure to Provide Resource:**

- (A) If the Contractor does not provide a required professional services resource that has all the required qualifications within the time prescribed by the Contract, the Contractor must credit to Canada an amount equal to the per diem rate (based on a 7.5-hour workday) of the required resource for each day (or partial day) of delay in providing the resource, up to a maximum of 10 days.
- (B) **Corrective Measures:** If credits are payable under this Article for two consecutive months or for three months in any 12-month period, the Contractor must submit a written action plan describing measures it will implement or actions it will undertake to eliminate the recurrence of the problem. The Contractor will have five working days to deliver the action plan to the Client and the Contracting Authority and 20 working days to rectify the underlying problem.
- (C) **Termination for Failure to Meet Availability Level:** In addition to any other rights it has under the Contract, Canada may terminate the Contract for default in accordance with the General Conditions by giving the Contractor three months' written notice of its intent, if any of the following apply:
 - (1) the total amount of credits for a given monthly billing cycle reach a level of 10% of the total billing for that month; or
 - (2) the corrective measures required of the Contractor described above are not met.

This termination will be effective when the three month notice period expires, unless Canada determines that the Contractor has implemented the corrective measures to Canada's satisfaction during those three months.

- (ii) **Credits Apply during Entire Contract Period:** The Parties agree that the credits apply throughout the Contract Period.
- (iii) **Credits represent Liquidated Damages:** The Parties agree that the credits are liquidated damages and represent their best pre-estimate of the loss to Canada in the event of the applicable failure. No credit is intended to be, nor will it be construed as, a penalty.
- (iv) **Canada's Right to Obtain Payment:** The Parties agree that these credits are a liquidated debt. To collect the credits, Canada has the right to hold back, draw back, deduct or set off from and against any money Canada owes to the Contractor from time to time.
- (v) **Canada's Rights & Remedies not Limited:** The Parties agree that nothing in this Article limits any other rights or remedies to which Canada is entitled under the Contract (including the right to terminate the Contract for default) or under the law generally.
- (vi) **Audit Rights:** The Contractor's calculation of credits under the Contract is subject to verification by government audit, at the Contracting Authority's discretion, before or after payment is made to the Contractor. The Contractor must cooperate fully with Canada during the conduct of any audit by providing Canada with access to any records and systems that Canada considers necessary to ensure that all credits have been accurately credited to Canada in the Contractor's invoices. If an audit demonstrates that past invoices contained errors in the calculation of the credits, the Contractor must pay to Canada the amount the audit reveals was required to be credited to Canada, plus interest, from the date Canada remitted the excess payment until the date of the refund (the interest rate is the Bank of Canada's discount annual rate of interest in effect on the date the credit was first owed to Canada, plus 1.25% per year). If, as a result of conducting an audit, Canada determines that the Contractor's records or systems for identifying, calculating or recording the credits are inadequate, the Contractor must implement any additional measures required by the Contracting Authority.
- (h) **No Responsibility to Pay for Work not performed due to Closure of Government Offices**
 - (i) Where the Contractor, its employees, subcontractors, or agents are providing services on government premises under the Contract and those premises are inaccessible because of the evacuation or closure of government offices, and as a result no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if there had been no evacuation or closure.
 - (ii) If, as a result of any strike or lock-out, the Contractor or its employees, subcontractors or agents cannot obtain access to government premises and, as a result, no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if the Contractor had been able to gain access to the premises

7.10 Invoicing Instructions

- (a) The Contractor must submit invoices in accordance with the information required in the General Conditions.
- (b) The Contractor's invoice must include a separate line item for each subparagraph in the Basis of Payment provision, and must show all applicable Task Authorization numbers.
- (c) By submitting invoices, the Contractor is certifying that the goods and services have been delivered and that all charges are in accordance with the Basis of Payment provision of the Contract, including any charges for work performed by subcontractors.

- (d) The Contractor must provide the original of each invoice to the Project Authority, and a copy to the Contracting Authority.

7.11 Certifications and Additional Information

- (a) Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, any TA quotation and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire Contract Period.

(b) SACC Manual Clauses

- (i) SACC Manual Clause A3000C (2014-11-27), Aboriginal Business Certification
(ii) SACC Manual Clause A3060C (2008-05-12), Canadian Content Certification

7.12 Federal Contractors Program for Employment Equity - Default by Contractor

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC)-Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the "[FCP Limited Eligibility to Bid](#)" list. The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

7.13 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in **[To be determined]**.

7.14 Priority of Documents

If there is a discrepancy between the wording of any documents that appear on the following list, the wording of the document that first appears on the list has priority over the wording of any document that appears later on the list:

- (a) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (b) Supplemental General Conditions, in the following order:
- (i) 4002 (2010-08-16), Supplemental General Conditions - Software Development or Modification Services;
- (ii) 4007 (2010-08-16), Supplemental General Conditions - Canada to Own Intellectual Property Rights in Foreground Information;
- (iii) 4008 (2008-12-12), Supplemental General Conditions - Personal Information.
- (c) General Conditions 2035 (2018-06-21), Higher Complexity - Services;
- (d) Annex A, Statement of Work, including its Appendices as follows:
- (i) Appendix A to Annex A - Tasking Assessment Procedure;
- (ii) Appendix B to Annex A - Task Authorization (TA) Form;
- (iii) Appendix C to Annex A - Resource Assessment Criteria and Response Table;
- (iv) Appendix D to Annex A - Certifications at the TA stage;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List;

- (g) the validly issued Task Authorizations and any required certifications (including all of their annexes, if any); and
- (h) the Contractor's bid dated _____, as clarified on _____ or as amended _____ .

7.15 Foreign Nationals (Canadian Contractor)

- (a) SACC Manual clause A2000C (2006-06-16) Foreign Nationals (Canadian Contractor)

7.16 Insurance Requirements

(a) Compliance with Insurance Requirements

- (i) The Contractor must comply with the insurance requirements specified in this Article. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.
- (ii) The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.
- (iii) The Contractor should forward to the Contracting Authority within ten (10) days after the date of award of the Contract a Certificate of Insurance evidencing the insurance coverage. Coverage must be placed with an Insurer licensed to carry out business in Canada and the Certificate of Insurance must confirm that the insurance policy complying with the requirements is in force. If the Certificate of Insurance has not been completed and submitted as requested, the Contracting Authority will so inform the Contractor and provide the Contractor with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within the time period will constitute a default under the General Conditions. The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

(b) Commercial General Liability Insurance

- (i) The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
- (ii) The Commercial General Liability policy must include the following:
 - (A) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
 - (B) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
 - (C) Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
 - (D) Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
 - (E) Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided.

Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.

- (F) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
- (G) Employees and, if applicable, Volunteers must be included as Additional Insured.
- (H) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
- (I) Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
- (J) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
- (K) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
- (L) Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.
- (M) Advertising Injury: While not limited to, the endorsement must include coverage for piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.

(c) **Errors and Omissions Liability Insurance**

- (i) The Contractor must obtain Errors and Omissions Liability (a.k.a. Professional Liability) insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature but for not less than \$1,000,000 per loss and in the annual aggregate, inclusive of defence costs.
- (ii) If the Professional Liability insurance is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
- (iii) The following endorsement must be included:
Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation.

7.17 Limitation of Liability - Information Management/Information Technology

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

- (i) The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:
 - (A) any infringement of intellectual property rights to the extent the Contractor breaches the section of the General Conditions entitled "Intellectual Property Infringement and Royalties";
 - (B) physical injury, including death.
 - (ii) The Contractor is liable for all direct damages caused by the Contractor's performance or failure to perform the Contract affecting real or tangible personal property owned, possessed, or occupied by Canada.
 - (iii) Each of the Parties is liable for all direct damages resulting from its breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of its unauthorized disclosure of the other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.
 - (iv) The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (i)(A) above.
 - (v) The Contractor is also liable for any other direct damages to Canada caused by the Contractor's performance or failure to perform the Contract that relate to:
 - (A) any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including any applicable taxes) for the goods and services affected by the breach of warranty; and
 - (B) Any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (B) of the greater of .75 times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the cell titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$1,000,000.00.

In any case, the total liability of the Contractor under subparagraph (v) will not exceed the total estimated cost (as defined above) for the Contract or \$1,000,000.00, whichever is more.
 - (vi) If Canada's records or data are harmed as a result of the Contractor's negligence or willful act, the Contractor's only liability is, at the Contractor's own expense, to restore Canada's records and data using the most recent back-up kept by Canada. Canada is responsible for maintaining an adequate back-up of its records and data.
- (c) **Third Party Claims:**
- (i) Regardless of whether a third party makes its claim against Canada or the Contractor, each Party agrees that it is liable for any damages that it causes to any third party in connection with the Contract as set out in a settlement agreement or as finally determined by a court of competent jurisdiction, where the court determines that the Parties are jointly and severally liable or that one Party is solely and directly liable to the third party. The amount of the liability will be the amount set out in the settlement agreement or determined by the court to have been the Party's portion of the damages to the third party. No settlement agreement is binding on a Party unless its authorized representative has approved the agreement in writing.

- (ii) If Canada is required, as a result of joint and several liability or joint and solidarily liable, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite Sub-article (i), with respect to special, indirect, and consequential damages of third parties covered by this Section, the Contractor is only liable for reimbursing Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of a third party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.
- (iii) The Parties are only liable to one another for damages to third parties to the extent described in this Sub-article (c).

7.18 Joint Venture Contractor

- (a) The Contractor confirms that the name of the joint venture is [REDACTED] and that it is comprised of the following members:
 - [REDACTED]
 - [REDACTED]
- (b) With respect to the relationship among the members of the joint venture Contractor, each member agrees, represents and warrants (as applicable) that:
 - (i) [REDACTED] has been appointed as the "representative member" of the joint venture Contractor and has fully authority to act as agent for each member regarding all matters relating to the Contract;
 - (ii) by giving notice to the representative member, Canada will be considered to have given notice to all the members of the joint venture Contractor; and
 - (iii) all payments made by Canada to the representative member will act as a release by all the members.
- (c) All the members agree that Canada may terminate the Contract in its discretion if there is a dispute among the members that, in Canada's opinion, affects the performance of the Work in any way.
- (d) All the members are jointly and severally or solidarily liable for the performance of the entire Contract.
- (e) The Contractor acknowledges that any change in the membership of the joint venture (i.e., a change in the number of members or the substitution of another legal entity for an existing member) constitutes an assignment and is subject to the assignment provisions of the General Conditions.
- (f) The Contractor acknowledges that all security and controlled goods requirements in the Contract, if any, apply to each member of the joint venture Contractor.

Note to Bidders: This Article will be deleted if the Bidder awarded the contract is not a joint venture. If the contractor is a joint venture, this clause will be completed with information provided in its bid.

7.19 Professional Services - General

- (a) The Contractor must provide professional services on request as specified in this Contract. All resources provided by the Contractor must meet the qualifications described in the Contract (including those relating to previous experience, professional designation, education, language proficiency and security clearance) and must be competent to provide the required services by any delivery dates described in the Contract.

- (b) If the Contractor fails to deliver any deliverable (excluding delivery of a specific individual) or complete any task described in the Contract on time, in addition to any other rights or remedies available to Canada under the Contract or the law, Canada may notify the Contractor of the deficiency, in which case the Contractor must submit a written plan to the Project Authority within ten working days detailing the actions that the Contractor will undertake to remedy the deficiency. The Contractor must prepare and implement the plan at its own expense.
- (c) In General Conditions 2035, the Article titled "Replacement of Specific Individuals" is deleted and the following applies instead:

Replacement of Specific Individuals

- (i) If the Contractor is unable to provide the services of any specific individual identified in the Contract to perform the services, the Contractor must within five working days of having this knowledge, the individual's departure or failure to commence Work (or, if Canada has requested the replacement, within ten working days of Canada's notice of the requirement for a replacement) provide to the Contracting Authority:
- (A) the name, qualifications and experience of a proposed replacement immediately available for Work; and
- (B) security information on the proposed replacement as specified by Canada, if applicable.

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

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

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

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

7.20 Safeguarding Electronic Media

- (a) Before using them on Canada's equipment or sending them to Canada, the Contractor must use a regularly updated product to scan electronically all electronic media used to perform the Work

for computer viruses and other coding intended to cause malfunctions. The Contractor must notify Canada if any electronic media used for the Work are found to contain computer viruses or other coding intended to cause malfunctions.

- (b) If magnetically recorded information or documentation is damaged or lost while in the Contractor's care or at any time before it is delivered to Canada in accordance with the Contract, including accidental erasure, the Contractor must immediately replace it at its own expense.

7.21 Representations and Warranties

The Contractor made statements regarding its own and its proposed resources' experience and expertise in its bid that resulted in the award of the Contract and the issuance of TA's. The Contractor represents and warrants that all those statements are true and acknowledges that Canada relied on those statements in awarding the Contract and adding work to it through TA's. The Contractor also represents and warrants that it has, and all its resources and subcontractors that perform the Work have, and at all times during the Contract Period they will have and maintain, the skills, qualifications, expertise and experience necessary to perform and manage the Work in accordance with the Contract, and that the Contractor (and any resources or subcontractors it uses) has previously performed similar services for other customers.

7.22 Access to Canada's Property and Facilities

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

7.23 Government Property

Canada agrees to supply the Contractor with the items listed in article **8.0 Client Support** of the Statement of Work. The section of the General Conditions entitled "Government Property" also applies to the use of the Government Property by the Contractor.

7.24 Transition Services at End of Contract Period

The Contractor agrees to execute the transition tasks identified within the Task Authorizations (if applicable), in the period leading up to the end of the Contract Period, and it will make all reasonable efforts to assist Canada in the transition from the Contractor to a new contract with another supplier.

7.25 Identification Protocol Responsibilities

The Contractor will be responsible for ensuring that each of its agents, representatives or subcontractors (hereinafter referred to as Contractor Representatives) complies with the following self-identification requirements:

- (a) Contractor Representatives who attend a Government of Canada meeting (whether internal or external to Canada's offices) must identify themselves as Contractor Representatives prior to the commencement of the meeting, to ensure that each meeting participant is aware of the fact that the individual is not an employee of the Government of Canada;
- (b) During the performance of any Work at a Government of Canada site, each Contractor Representative must be clearly identified at all times as being a Contractor Representative; and
- (c) If a Contractor Representative requires the use of the Government of Canada's e-mail system in the performance of the Work, then the individual must clearly identify him or herself as an agent or subcontractor of the Contractor in all electronic mail in the signature block as well as under "Properties." This identification protocol must also be used in all other correspondence, communication, and documentation.

- (d) If Canada determines that the Contractor is in breach of any obligation stated in this Article, upon written notice from Canada the Contractor must submit a written action plan describing corrective measures it will implement to eliminate the recurrence of the problem. The Contractor will have five working days to deliver the action plan to the Client and the Contracting Authority, and twenty working days to rectify the underlying problem.
- (e) In addition to any other rights it has under the Contract, Canada may terminate the Contract for default if the corrective measures required of the Contractor described above are not met.

ANNEX A
STATEMENT OF WORK

(SEE ATTACHED DOCUMENT)

APPENDIX A TO ANNEX A

TASKING ASSESSMENT PROCEDURE

1. Where a requirement for a specific task is identified, a draft Task Authorization Form (TA Form) as attached at Appendix B to Annex A will be provided to the Contractor in accordance with the allocation methodology stated in the Contract Article titled "Allocation of Task Authorizations". Once a draft TA Form is received, the Contractor must submit to the Project Authority a quotation of rates to supply the requested Resource Categories based on the information identified in the TA Form, as well as its corresponding proposed resource(s). The quotation must be signed and submitted to Canada within the time for response identified in the TA Form. The Contractor will be given a minimum of 3 working days (or any longer time period specified in the draft TA) turnaround time to submit a quotation.
2. With each quotation the Contractor must propose the required number of resources and for each proposed resource the Contractor must supply a résumé, the requested security clearance information and must complete the Response Tables at Appendix C of Annex A applicable to the Resource Categories identified in the draft TA. The same individual must not be proposed for more than one Resource Category. The résumés must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
 - (i) Proposed resources may be employees of the Contractor or employees of a subcontractor, or these individuals may be independent contractors to whom the Contractor would subcontract a portion of the Work. (Refer to Appendix D to Annex A, Certifications).
 - (ii) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource before the date the draft TA was first issued to the Contractor.
 - (iii) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of draft TA issuance and must continue, where applicable, to be a member in good standing of the profession or membership throughout the assessment period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this Contract or if the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued.
 - (iv) For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal co-operative programme at a post-secondary institution.
 - (v) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the résumé does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
 - (vi) A résumé must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the TA Form, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which

activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.

3. The qualifications and experience of the proposed resources will be assessed against the requirements set out in Appendix C to Annex A to determine each proposed resource's compliance with the mandatory and rated criteria. Canada may request proof of successful completion of formal training, as well as reference information. Canada may conduct reference checks to verify the accuracy of the information provided. If reference checks are done, they will be conducted in writing by e-mail (unless the contact at the reference is only available by telephone). Canada will not assess any points or consider a mandatory criterion met unless the response is received within 5 working days. On the third working day after sending out the e-mails, if Canada has not received a response, Canada will notify the Contractor by e-mail, to allow the Contractor to contact its reference directly to ensure that it responds to Canada within 5 working days. Wherever information provided by a reference differs from the information supplied by the Contractor, the information supplied by the reference will be the information assessed. Points will not be allocated or a mandatory criteria considered as met if the reference customer is not a customer of the Contractor itself (for example, the customer cannot be the customer of an affiliate of the Contractor). Nor will points be allocated or a mandatory criteria considered as met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Contractor. Crown references will be accepted.
4. During the assessment of the resources proposed, should the references for two or more resources required under that TA either be unavailable or fail to substantiate the required qualifications of the proposed resources to perform the required services, the Contractor's quotation may be found to be non-responsive.
5. Only quotations that meet all of the mandatory criteria will be considered for assessment of the point rated criteria. Each resource proposed must attain the required minimum score for the point rated criteria for the applicable Resource Category. If the minimum score for any proposed resource is less than what is required, the Contractor's quotation will be found to be non-responsive.
6. Once the quotation has been accepted by the Project Authority, the TA Form will be signed by Canada and provided to the Contractor for signature. The TA Form must be appropriately signed by Canada prior to commencement of any work. The Contractor must not commence work until a validly issued TA Form (the Task Authorization) has been received, and any work performed in its absence is done at the Contractor's own risk.

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

(SEE ATTACHED DOCUMENT)

**APPENDIX C TO ANNEX A
RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE**

(SEE ATTACHED DOCUMENT)

**APPENDIX D TO ANNEX A
CERTIFICATIONS AT THE TA STAGE**

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

1. CERTIFICATION OF EDUCATION AND EXPERIENCE

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

Print name of authorized individual & sign above

Date

2. CERTIFICATION OF AVAILABILITY OF PERSONNEL

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

Print name of authorized individual & sign above

Date

3. CERTIFICATION OF STATUS OF PERSONNEL

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

Print name of authorized individual & sign above

Date

4. CERTIFICATION OF LANGUAGE - English

The Contractor certifies that the proposed resource(s) in response to this draft Task Authorization is/are fluent in English. The individual(s) proposed must be able to communicate orally and in writing in English without any assistance and with minimal errors.

Print name of authorized individual & sign above

Date

5. NON-DISCLOSURE AGREEMENT

I, _____ (name of proposed resource), recognize that in the course of my work as an employee or subcontractor of _____ (name of contractor), I may be given access to information by or on behalf of Canada in connection with the Work, pursuant to Contract Serial No. _____ between Her Majesty the Queen in right of Canada, represented by the Minister of Public Works and Government Services and Canada Border Services Agency, including any information that is confidential or proprietary to third parties, and information conceived, developed or produced by the Contractor as part of the Work. For the purposes of this agreement, information includes but not limited to: any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form, recorded electronically, or otherwise and whether or not labeled as proprietary or sensitive, that is disclosed to a person or that a person becomes aware of during the performance of the Contract.

I agree that I will not reproduce copy, use, divulge, release or disclose, in whole or in part, in whatever way or form any information described above to any person other than a person employed by Canada on a need to know basis. I undertake to safeguard the same and take all necessary and appropriate measures, including those set out in any written or oral instructions issued by Canada, to prevent the disclosure of or access to such information in contravention of this agreement.

I also acknowledge that any information provided to the Contractor by or on behalf of Canada must be used solely for the purpose of the Contract and must remain the property of Canada or a third party, as the case may be.

I agree that the obligation of this agreement will survive the completion of the Contract Serial No.: _____.

Print name of proposed resource & sign above

Date

ANNEX B
BASIS OF PAYMENT

WORKSTREAM 1

INITIAL CONTRACT PERIOD (2 YEARS)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 – Application/Software Architect	LEVEL 3	
A.6 – Programmer/Software Developer	LEVEL 2	80% of level 3
A.6 – Programmer/Software Developer	LEVEL 3	
A.8 – System Analyst	LEVEL 3	
A.13. Web Designer	LEVEL 2	
I.7 – Platform Analyst	LEVEL 3	
I.11 – Technology Architect	LEVEL 3	
B.1 – Business Analyst	LEVEL 3	
B.6 – Business System Analyst	LEVEL 2	80% of level 3
B.6 – Business System Analyst	LEVEL 3	
B.14 Technical Writer	LEVEL 2	80% of level 3
B.14 Technical Writer	LEVEL 3	
P.5 – Project Executive	LEVEL 3	

OPTION YEAR 1 (1 YEAR)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 – Application/Software Architect	LEVEL 3	
A.6 – Programmer/Software Developer	LEVEL 2	80% of level 3
A.6 – Programmer/Software Developer	LEVEL 3	
A.8 – System Analyst	LEVEL 3	
A.13. Web Designer	LEVEL 2	
I.7 – Platform Analyst	LEVEL 3	
I.11 – Technology Architect	LEVEL 3	
B.1 – Business Analyst	LEVEL 3	
B.6 – Business System Analyst	LEVEL 2	80% of level 3
B.6 – Business System Analyst	LEVEL 3	
B.14 Technical Writer	LEVEL 2	80% of level 3
B.14 Technical Writer	LEVEL 3	
P.5 – Project Executive	LEVEL 3	

OPTION YEAR 2 (1 YEAR)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 – Application/Software Architect	LEVEL 3	
A.6 – Programmer/Software Developer	LEVEL 2	80% of level 3
A.6 – Programmer/Software Developer	LEVEL 3	
A.8 – System Analyst	LEVEL 3	
A.13. Web Designer	LEVEL 2	
I.7 – Platform Analyst	LEVEL 3	
I.11 – Technology Architect	LEVEL 3	
B.1 – Business Analyst	LEVEL 3	
B.6 – Business System Analyst	LEVEL 2	80% of level 3
B.6 – Business System Analyst	LEVEL 3	
B.14 Technical Writer	LEVEL 2	80% of level 3
B.14 Technical Writer	LEVEL 3	
P.5 – Project Executive	LEVEL 3	

OPTION YEAR 3 (1 YEAR)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 – Application/Software Architect	LEVEL 3	
A.6 – Programmer/Software Developer	LEVEL 2	80% of level 3
A.6 – Programmer/Software Developer	LEVEL 3	
A.8 – System Analyst	LEVEL 3	
A.13. Web Designer	LEVEL 2	
I.7 – Platform Analyst	LEVEL 3	
I.11 – Technology Architect	LEVEL 3	
B.1 – Business Analyst	LEVEL 3	
B.6 – Business System Analyst	LEVEL 2	80% of level 3
B.6 – Business System Analyst	LEVEL 3	
B.14 Technical Writer	LEVEL 2	80% of level 3
B.14 Technical Writer	LEVEL 3	
P.5 – Project Executive	LEVEL 3	

WORKSTREAM 2

INITIAL CONTRACT PERIOD (2 YEARS)		
Resource Category	Level of Expertise	Firm Per Diem Rate
C.1 – Strategic Information Technology Security Planning and Protection Consultant	LEVEL 3	

OPTION YEAR 1 (1 YEAR)		
Resource Category	Level of Expertise	Firm Per Diem Rate
C.1 – Strategic Information Technology Security Planning and Protection Consultant	LEVEL 3	

OPTION YEAR 2 (1 YEAR)		
Resource Category	Level of Expertise	Firm Per Diem Rate
C.1 – Strategic Information Technology Security Planning and Protection Consultant	LEVEL 3	

OPTION YEAR 3 (1 YEAR)		
Resource Category	Level of Expertise	Firm Per Diem Rate
C.1 – Strategic Information Technology Security Planning and Protection Consultant	LEVEL 3	

ANNEX C
SECURITY REQUIREMENTS CHECK LIST

(SEE ATTACHED DOCUMENT)

ATTACHMENT 2
BID EVALUATION CRITERIA - MANDATORY REQUIREMENTS

Technical proposals will be evaluated in accordance with the following evaluation criteria. Substantiation of mandatory requirements must not simply be a repetition of the criteria, but must explain and demonstrate how the Bidder meets the requirement. Where Canada determines that the substantiation of a mandatory requirement is not complete, the Bidder will be considered non-responsive.

Original Solicitation Closing Date = 2019-06-25

1.0 WORKSTREAM 1

1.1 MANDATORY CORPORATE REQUIREMENTS

ID	Corporate Mandatory Criteria	Bidder's response	
		Met Y/N	Demonstrated Experience (Bidders to insert data)
M.1 ^{PB}	<p>The Bidder must demonstrate that it has been awarded 2 informatics professional services contracts*, within the last 5 years prior to the Original Solicitation Closing Date, that met the following criteria:</p> <ul style="list-style-type: none"> (1) The contract was in support of an IM/IT system project. A summary of the scope and key responsibilities must be provided; (2) The contract value** was \$2,000,000.00 minimum. <p>*The above requirement must be demonstrated in a signed letter by the client. The name of the client and the name of a contact person at the client must be provided in the letter. It is requested that an email and phone number also be provided. It is also requested that the description of the informatics professional services be limited to 1 paragraph and the contract title or serial number be included.</p> <p>**value is defined as either the amount specified in the limitation of expenditure article of the contract, plus applicable taxes, or the total price in the contract, whichever is the highest.</p>		

M.2 PB

The Bidder must demonstrate the Minimum Billable Days for ALL the resource categories identified below.

To be accepted:

- 1) The billable days must have been for the delivery of informatics professional services;
- 2) For each resource category, the billable days must have occurred, in a 60-month period, within the past 7 years prior to the Original Solicitation Closing Date;
- 3) The billable days for all resource categories must have been provided under a maximum of 5 contracts;
- 4) The work billed for a given resource category must include at least 50% of the associated tasks listed in Article 5 of Annex A - Statement of Work for the same resource category; and
- 5) The Bidder must provide a completed Billable Days Response Template (Appendix A) as well as a Bidder's Response Template for Corporate References (Appendix B) provided in this attachment for each Resource Category.

Resource Category	Minimum Billable Days per Resource Category (1 billable day = 7.5 hours)
A.1 - Application/Software Architect – Level 3	500
A.6 - Programmer/Software Developer – Level 2 or Level 3 or any combination thereof	1000
A.8 - System Analyst – Level 3	500
A.13 - Web Designer Consultant – Level 2	500
I.7 - Platform Analyst - Level 3	500
I.11 - Technology Architect - Level 3	500
B.1 - Business Analyst - Level 3	500
B.6 - Business System Analyst - Level 2 or Level 3 or any combination thereof	1000
B.14 - Technical Writer – Level 2 or Level 3 or any combination thereof	500
P.5 - Project Executive – Level 3	500



1.2 MANDATORY RESOURCE REQUIREMENTS

The Bidder must propose one (1) resource for each of the following resource categories and include an up to date résumé for each of the proposed resources.

1.2.1 A.1 – Application/Software Architect – Level 3

Name of proposed Resource: _____				
The Bidder MUST demonstrate that the proposed Application/Software Architect – Level 3 has:				
Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
M.1 ^{PB}	<p>A minimum of ten (10) years of experience designing and documenting architectural specifications for interfaces or integration between new and existing systems.</p> <p>For each project referenced*, the Bidder should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization - Scope, objectives, and project time frame; and - Description of the roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
	<p>A college or university degree or post-secondary diploma in Information Technology, Computer Science or Electrical Engineering.</p> <p>The Bidder should provide a readable copy of the degree/diploma in English or French with its bid.</p>			

1.2.2 A.6 - Programmer/Software Developer – Level 3

Name of proposed Resource: _____				
The Bidder MUST demonstrate that the proposed Programmer/Software Developer – Level 3 has:				
Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
M.1 	<p>A minimum of seven (7) years of experience as a Programmer/Software Developer in developing either web or mobile applications or any combination thereof using one or any combination of the following programming languages:</p> <ul style="list-style-type: none"> - Java - JavaScript - HTML 5 - CSS - C++ - Objective C - C# - Kotlin - React - .NET <p>For each project referenced*, the Bidder should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, and project time frame; and - Description of the roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
M.2 	<p>A college or university degree or post-secondary diploma in Information Technology, Computer Science or Electrical Engineering.</p> <p>The Bidder should provide a readable copy of the degree/diploma in English or French with its bid.</p>			

2.0 WORKSTREAM 2

2.1 MANDATORY RESOURCE REQUIREMENTS

The Bidder must propose one (1) resource for the following resource category and include an up to date résumé for the proposed resource.

2.1.1 C.1 – Strategic Information Technology Security Planning and Protection Consultant – Level 3

Name of proposed Resource: _____				
The Bidder MUST demonstrate that the proposed Strategic Information Technology Security Planning and Protection Consultant – Level 3 has:				
Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
M.1 <small>PB</small>	<p>A minimum of seven (7) years of experience in completing initiatives that support an IT Security and Cyber Protection program.</p> <p>For each project referenced*, the Bidder should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, and project time frame; and - Description of the roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
M.2 <small>PB</small>	<p>A college or university degree or post-secondary diploma in Information Technology, Computer Science or Electrical Engineering.</p> <p>The Bidder should provide a readable copy of the degree/diploma in English or French with its bid.</p>			

APPENDIX A OF ATTACHMENT 2
RFP BILLABLE DAYS RESPONSE TABLE

Bidder Name: _____

By providing a response, the Bidder certifies that billable days provided occurred during the billing period indicated below for ALL of the resource categories listed.

	NUMBER OF BILLABLE DAYS			
	Cross Reference to Contract Reference # _____ Billing Period: ____/____/____ (dd/mm/yy) To ____/____/____ (dd/mm/yy)	Cross Reference to Contract Reference # _____ Billing Period: ____/____/____ (dd/mm/yy) To ____/____/____ (dd/mm/yy)	Cross Reference to Contract Reference # _____ Billing Period: ____/____/____ (dd/mm/yy) To ____/____/____ (dd/mm/yy)	Cross Reference to Contract Reference # _____ Billing Period: ____/____/____ (dd/mm/yy) To ____/____/____ (dd/mm/yy)
RESOURCE CATEGORY				
A.1 - Application/Software Architect – Level 3				
A.6 - Programmer/Software Developer – Level 2 or Level 3 or any combination thereof				
A.8 - System Analyst – Level 3				
A.13 - Web Designer Consultant – Level 2				
I.7 - Platform Analyst - Level 3				
I.11 - Technology Architect - Level 3				

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Buyer ID:
632eI

NUMBER OF BILLABLE DAYS				
	Cross Reference to Contract Reference # _____ Billing Period: _/_/_/_ (dd/mm/yy) To _/_/_/_ (dd/mm/yy)	Cross Reference to Contract Reference # _____ Billing Period: _/_/_/_ (dd/mm/yy) To _/_/_/_ (dd/mm/yy)	Cross Reference to Contract Reference # _____ Billing Period: _/_/_/_ (dd/mm/yy) To _/_/_/_ (dd/mm/yy)	Cross Reference to Contract Reference # _____ Billing Period: _/_/_/_ (dd/mm/yy) To _/_/_/_ (dd/mm/yy)
RESOURCE CATEGORY				
B.1 - Business Analyst - Level 3				
B.6 - Business System Analyst - Level 2 or Level 3 or any combination thereof				
B.14 - Technical Writer – Level 2 or Level 3 or any combination thereof				
P.5 - Project Executive – Level 3				

APPENDIX B OF ATTACHMENT 2

BIDDER'S RESPONSE TEMPLATE FOR CORPORATE REFERENCES

To meet M.2 of attachment 2, the Bidder must have demonstrated contract experience in supplying all of the resource categories or similar resource categories, for the required Minimum Billable Days per category, in a 60-month period, within the past 7 years prior to the Original Solicitation Closing Date. All resources provided must have completed at least 50% of the tasks detailed in Article 5 of Annex A (SOW), for the resource category for which they were provided.

The substantiation must not simply be a repetition of the tasks, but must explain responsibilities and demonstrate how the Bidder carried out the work while performing the tasks.

Bidder Name: _____ Bidder Contract Reference #: _____

SECTION 1: CLIENT INFORMATION

Government client (Yes/No)	
Client Organization Name	
Client Contact Name	
Address	
Telephone	
Fax	
E-mail	

SECTION 2: CONTRACT INFORMATION

Contract Value	
Award Date	
Expiry Date	
Description of requirement:	

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SECTION 3: RESOURCE DETAILS

Category of Personnel and Level	Task from Article 5 of Annex A - SOW	Task performed under the contract, including substantiation

**ATTACHMENT 3
BID EVALUATION CRITERIA – RATED REQUIREMENTS**

Technical proposals will be evaluated in accordance with the following evaluation criteria. Substantiation of rated requirements must not simply be a repetition of the criteria, but must explain and demonstrate how the Bidder meets the requirement. Where Canada determines that the substantiation of a rated requirement is not complete, the Bidder will be rated accordingly.

1.0 WORKSTREAM 1

1.1 RATED CORPORATE REQUIREMENTS

	Point Rated Criteria	Points	Bidder's Response																								
			Evaluation Guideline	Cross Reference to Contract Reference(s)																							
R1	<p>The Bidder will be awarded points for demonstrated billable days experience in excess of the minimum Billable Days per Resource Category under M.2.</p> <table border="1"> <thead> <tr> <th colspan="5">EXAMPLE EVALUATION SCENARIO</th> </tr> <tr> <th colspan="5">BILLABLE DAYS</th> </tr> <tr> <th rowspan="3">RESOURCE CATEGORY</th> <th>(A)</th> <th>(B)</th> <th>(C)</th> <th>(D)</th> </tr> </thead> <tbody> <tr> <td>BIDDER'S TOTAL</td> <td>MINIMUM BILLABLE DAYS IDENTIFIED UNDER M1</td> <td>BILLABLE DAYS IN EXCESS OF M1</td> <td>BIDDER % INCREASE TO A MAXIMUM OF 100 (Rounded to two decimal places)</td> </tr> <tr> <td>App A to Att 2</td> <td></td> <td>(C)=(A)-(B)</td> <td>(D)=(C)/(B)*100</td> </tr> </tbody> </table>	EXAMPLE EVALUATION SCENARIO					BILLABLE DAYS					RESOURCE CATEGORY	(A)	(B)	(C)	(D)	BIDDER'S TOTAL	MINIMUM BILLABLE DAYS IDENTIFIED UNDER M1	BILLABLE DAYS IN EXCESS OF M1	BIDDER % INCREASE TO A MAXIMUM OF 100 (Rounded to two decimal places)	App A to Att 2		(C)=(A)-(B)	(D)=(C)/(B)*100	100	<p>The Bidder's demonstrated "Total Billable Days" provided in response to M.2 will be used to evaluate this criterion.</p> <p>The Bidder will be awarded points as demonstrated in the example evaluation scenario on the left side.</p> <p>In this example, the Bidder would score 72.00 points out of a possible 100 points.</p>	
EXAMPLE EVALUATION SCENARIO																											
BILLABLE DAYS																											
RESOURCE CATEGORY	(A)	(B)	(C)	(D)																							
	BIDDER'S TOTAL	MINIMUM BILLABLE DAYS IDENTIFIED UNDER M1	BILLABLE DAYS IN EXCESS OF M1	BIDDER % INCREASE TO A MAXIMUM OF 100 (Rounded to two decimal places)																							
	App A to Att 2		(C)=(A)-(B)	(D)=(C)/(B)*100																							

Solicitation Number:
47419-206529/A

Amendment Number:

Buyer ID:
632el

Point Rated Criteria	Points					Bidder's Response	
	Evaluation Guideline	Cross Reference to Contract Reference(s)					
A.1 - Application/Software Architect – Level 3	1200	500	700	100.00			
A.6 - Programmer/Software Developer – Level 2 or Level 3 or any combination thereof	1500	1000	500	50.00			
A.8 - System Analyst – Level 3	700	500	200	40.00			
A.13 - Web Designer Consultant – Level 2	900	500	400	80.00			
I.7 - Platform Analyst – Level 3	700	500	200	40.00			
I.11 - Technology Architect – Level 3	1100	500	600	100.00			
B.1 - Business Analyst – Level 3	1200	500	700	100.00			
B.6 - Business System Analyst – Level 2 or Level 3 or any combination thereof	1700	1000	700	70.00			
B.14 - Technical Writer – Level 2 or Level 3 or any combination thereof	2000	1000	1000	100.00			
P.5 - Project Executive – Level 3	700	500	200	40.00			
BIDDER SCORE = SUM OF (D) FOR ALL CATEGORIES / 10			72.00				
MAXIMUM AVAILABLE POINTS					100		
MINIMUM PASS MARK						70	
Note: Proposals that do not meet the above minimum pass mark will be found non-responsive.							

1.2 RATED RESOURCE REQUIREMENTS

1.2.1 A.1 - Application/Software Architect - Level 3

Name of proposed Resource: _____			
The Bidder SHOULD demonstrate that the proposed Application/Software Architect – Level 3 has:			
Criteria	Rated Requirement	Maximum Points	Point Allocation
R.1	<p>More than five (5) years of experience as an application/software architect developing technical architectures, frameworks and strategies for application development projects to meet business and application.</p> <p>For each project referenced*, the Bidder should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	25	<ul style="list-style-type: none"> • 0 to 5 years = 0 points • 5+ to 6 years = 5 points • 6+ to 7 years = 10 points • 7+ to 8 years = 15 points • 8+ to 9 years = 20 points • 9+ years = 25 points
			Substantiating Information, Cross Reference to Proposal

<p>R.2</p>	<p>Experience, in excess of M.1, designing and documenting architectural specifications for interfaces or integration between new and existing systems.</p> <p>For each project referenced*, the Bidder should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	<p>25</p>	<ul style="list-style-type: none"> • 0 to 10 years = 0 points • 10+ to 11 years = 5 points • 11+ to 12 years = 20 points • 12 to 13 years = 15 points • 13+ to 14 years = 20 points • 14+ years = 25 points 	
<p>Maximum Available Points</p>				<p>50</p>
<p>Minimum Pass Mark</p>				<p>35</p>
<p>Note: Proposals that do not meet the above minimum pass mark for the proposed resource, will be found non-responsive.</p>				

1.2.2 A.6 – Programmer/Software Developer – Level 3

Name of proposed Resource: _____			
The Bidder SHOULD demonstrate that the proposed Programmer/Software Developer – Level 3 has:			
Criteria	Rated Requirement	Maximum Points	Point Allocation
R.1	<p>More than seven (7) years of experience as a Programmer/Software Developer, developing and modifying code and software using one or any combination of the following programming languages:</p> <ul style="list-style-type: none"> - Java - JavaScript - HTML 5 - CSS - C++ - Objective C - C# - Kotlin - React - .NET - JEE - Angular <p>For each project referenced*, the Bidder should provide the following details including but not limited to:</p>	25	<ul style="list-style-type: none"> • 0 to 7 years = 0 points • 7+ to 8 years = 5 points • 8+ to 9 years = 10 points • 9+ to 10 years = 15 points • 10+ to 11 years = 20 points • 11+ years = 25 points
			Substantiating Information, Cross Reference to Proposal

	<p>- Name and description of client organization;</p> <p>- Scope, objectives, project time frame; and</p> <p>- Description of the project, roles and responsibilities of the proposed resource.</p> <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
<p>R.2</p>	<p>Experience, in excess of M.1, as a Programmer/Software Developer in developing either web or mobile applications or any combination thereof using one or any combination of the following programming languages:</p> <ul style="list-style-type: none"> - Java - JavaScript - HTML 5 - CSS - C++ - Objective C - C# - Kotlin - React - .NET 	<p>25</p>	<ul style="list-style-type: none"> • 0 to 7 years = 0 points • 7+ to 8 years = 5 points • 8+ to 9 years = 10 points • 9+ to 10 years = 15 points • 10+ to 11 years = 20 points • 11+ years = 25 points 	

	<p>For each project referenced*, the Bidder should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>		
Total Points Available		50	
Minimum Pass Mark		35	
<p>Note: Proposals that do not meet the above minimum pass mark for the proposed resource, will be found non-responsive.</p>			

2.0 WORKSTREAM 2

2.1 RATED RESOURCE REQUIREMENTS

2.1.1 C.1 – Strategic Information Technology Security Planning and Protection Consultant – Level 3

Name of proposed Resource: _____			
The Bidder SHOULD demonstrate that the proposed Strategic Information Technology Security Planning and Protection Consultant – Level 3 has:			
Criteria	Rated Requirement	Maximum Points	Point Allocation
R.1	<p>Experience, in excess of M.1, in completing initiatives that support an IT Security and Cyber Protection program.</p> <p>For each referenced project*, the Bidder should provide the following project details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	5	<ul style="list-style-type: none"> • 0 to 7 years = 0 points • 7+ to 8 years = 1 point • 8+ to 9 years = 2 points • 9+ to 10 years = 3 points • 10+ to 11 years = 4 points • 11+ years = 5 points
			Substantiating Information, Cross Reference to Proposal

<p>R.2</p>	<p>More than five (5) years of experience in the development of one or any combination of the following security programs and postures:</p> <ul style="list-style-type: none"> - Biometrics - RFID - access control - mobile security <p>For each project referenced*, the Bidder should provide the following project details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	<p>5</p>	<ul style="list-style-type: none"> • 0 to 5 years = 0 points • 5+ to 6 years = 1 point • 6+ to 7 years = 2 points • 7+ to 8 years = 3 points • 8+ to 9 years = 4 points • 9+ years = 5 points 	
<p>R.3</p>	<p>More than five (5) years of experience, within the last ten (10) years prior to the Original Solicitation Closing Date, performing facilitation activities during requirements gathering in conjunction with the business clients, partners and project team members to ensure business process</p>	<p>5</p>	<ul style="list-style-type: none"> • 0 to 5 years = 0 points • 5+ to 6 years = 1 point • 6+ to 7 years = 2 points • 7+ to 8 years = 3 points • 8+ to 9 years = 4 points 	

	<p>components are properly identified and documented.</p> <p>For each referenced project*, the Bidder should provide the following project details including but not limited to:</p> <ul style="list-style-type: none"> - Name & description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	<ul style="list-style-type: none"> • 9+ years = 5 points 	
Total Points Available		15	
Minimum Pass Mark		10	
<p>Note: Proposals that do not meet the above minimum pass mark for the proposed resource, will be found non-responsive.</p>			

ANNEX A

STATEMENT OF WORK

1.0 Title

Informatics Professional Services for Canada Border Services Information Technology Projects in the National Capital Area (NCA)

2.0 Objective

The Business Application Systems Directorate (BASD) of the Canada Border Services Agency (CBSA) requires a variety of Information Management (IM)/Information Technology (IT) professional resource services with knowledge and experience supporting and assisting with Government of Canada business application systems/security system projects.

The purpose of these services is to augment capacity in the planning and execution of departmental IM/IT initiatives managed by the Information, Science and Technology Branch (ISTB) team on an as and when required basis.

IM/IT expertise and support services are required to provide expert level advice and thought leadership in specific technologies, processes, applications, and integrated programs interdepartmentally and with other stakeholders accountable for IM/IT initiatives. This includes, but is not limited to, implementation suggestions, identification of road maps for way forward, expertise/guidance on evolving technologies/mandates and risk initiatives, and IT/IM professional services on critical business application and security systems on an as and when required basis. This will ensure a third party independent view required to provide feedback, monitoring and expertise/recommendations to ensure the technology component of projects progresses as required.

3.0 Background

CBSA is responsible for providing integrated services supporting national security and public safety priorities while facilitating the free flow of people and goods. CBSA manages this priority through its design, development, implementation and ongoing support of IM/IT tools and systems at the Agency, while maintaining the integrity and availability of all technology infrastructures and applications.

ISTB provides technology leadership of corporate business applications and IT programs at CBSA. ISTB provides delivery of technology products, applications and services to meet business needs while investing in modern IT infrastructure to maintain, build on and innovate current and future IM/IT Agency initiatives.

BASD is responsible for the development, production support and maintenance of critical business systems, emerging technologies and critical infrastructure initiatives. These initiatives include, but are not limited to, critical systems, emerging technologies, infrastructure support, evolving platforms, security protocols and applications that serve as common components for internal and external stakeholders. As well, BASD is accountable for the design, development

and delivery of enterprise and corporate IT/IM solutions and infrastructure in support of CBSA's mandate.

BASD manages IM/IT initiatives such as, but not limited to:

1. The Agency SAP Corporate System
2. Electronic Data Warehouse and Business Intelligence systems/reporting
3. Business Process Automation, Business to Business Integration and Customs Electronic Commerce Platform
4. Administrative and Corporate Applications
5. New and Emerging IM/IT security and corporate system technologies
6. Infrastructure and evolving new IM/IT initiatives

BASD is responsible for:

- Development, maintenance and / or support of IT application solutions; and
- Development and / or maintenance of IT application solutions related to travellers, enterprise and common services, commercial and corporate.

The directorate is organized into divisions:

- The Commercial Systems Division provides the System Development Lifecycle services in support of commercial projects: eManifest and Trusted Traders. The division is also responsible for the production support of the TITAN and Commercial Portal Systems. Key divisional activities include:
 - Providing the planning, analysis, design, development, and implementation of commercial systems solutions in support of the emerging commercial program;
 - Serving as the focal point of all IT development associated with commercial eManifest and Trusted Traders projects;
 - Prioritizing and promoting IT development initiatives with end-users and other IT management areas;
 - Managing overall IT project lifecycle coordination for commercial eManifest and Trusted Traders projects and accountable for their delivery; and
 - Acting as a liaison between our commercial business clients and other Branch IT areas.
- The Common and Corporate Systems Division is responsible for the development, production support and maintenance of multiple diverse and innovative applications and solutions which include mission critical technology systems as well as applications that provide a common foundation to ISTB colleagues, internal and external stakeholders. The division is also responsible for the design, development and delivery of Enterprise Common and Corporate solutions in order to meet the Agency and Branch demands and priorities. Key divisional activities include:
 - Providing the planning, analysis, design, development, and implementation of enterprise and corporate applications in support of common and corporate programs and administrative functions across the Agency;

- Deliver enterprise and corporate capabilities that are functional components which perform common tasks identified within the requirements of various business initiatives;
 - Promote reusability through established CBSA best practices and standards by meeting the overlapping needs of the various projects and removing the need for each initiative or project to fund and build these redundant components;
 - Serving as the technical focal point for all IT development projects related to common and corporate functions and activities;
 - Serving as Technical Leaders for Common and Corporate application releases which includes developing System Use Cases, Detailed Design Documents, participating in SEM reviews and other development related documentation;
 - Prioritizing and promoting IT development initiatives with end-users and other IT management areas;
 - Coordinating the procurement of commercial off-the-shelf (COTS) software products and IT hardware needed to meet the business requirements outlined by common and corporate initiatives;
 - Providing maintenance and production support for a wide-range of common and corporate applications;
 - Monitoring and support of systems in production; and
 - Analyzing and impacting production Problem Reports and Change Requests.
- The Enforcement Systems Division is responsible for a suite of mission critical applications created to assist the CBSA in meeting its mandate of supporting security and public safety priorities while facilitating the free flow of persons and goods. The division's applications share critical enforcement information with a variety of internal and external governments, agencies and missions abroad. Information sharing includes: Lookouts, Enforcement Actions, Passage History, API / PNR, Secret information (Secure systems), Wants and Warrants, Currency Seizures, Drug Seizures, and Flight Arrival/Departure Details. Key divisional activities include:
 - Maintaining technology systems to assess in the efficient and secure entry of travellers into Canada;
 - Collecting, analyzing and disseminating information necessary to identify and react to risk at the Canadian border crossings;
 - Sharing and reporting on collected information with external users such as the United States border services agencies, other security agencies such as the Royal Canadian Mounted Police, and other government departments;
 - Providing an automated facility for the compilation and sharing of intelligence case information on individuals and organizations that are known or suspected to be a potential border risk;
 - Providing a library of enforcement information for use by Intelligence and Enforcement staff and Border Services Officers across the country;
 - Developing and maintaining query systems across multiple enforcement and intelligence data repositories;

- Performing HR management in the areas of staffing, performance, coaching and training;
 - Maintaining client relationships by way of regular meetings, consultations, reporting; and
 - Ad hoc reporting in support of the Internal Audit function.
- The Travellers Systems Division is responsible for the analysis, design, development, testing, maintenance, and production support (some are 24 / 7, on call) of CBSA systems used to expedite and facilitate travellers entering Canada. Key divisional activities include:
 - Providing tools that can be used to perform automated risk assessments to facilitate the efficient and secure entry of travellers and conveyance into Canada;
 - Maintaining application that uses technology such as self-help kiosks, Document Readers, Iris Scanners, License Plate Readers, RFID, Facial Recognition, and Fingerprints Verifications;
 - Developing and maintaining joint technology systems with the United States, other government departments and private industry to expedite processing of trusted and regular travellers at border crossings such as PIK (Primary Inspection Kiosk), Nexus, ABC (Automated Border Clearance), EDL (Electronic Driver's License), Mobile IPIL;
 - Providing designated users with a single consolidated view of all previous traveller passages captured within the Integrated Customs System;
 - Developing and maintaining a variety of distributed applications that support both border services operations;
 - Developing and maintaining a variety of mobile applications to enhance the experience and expedite traveller's processing at port of entries;
 - Developing and maintaining enterprise components that support service Oriented architecture; and
 - Supporting the direction of the Government of Canada to adopt the use of emerging technologies (such as Cloud, Mobile computing, Enterprise Building Blocks Solutions).
 - The Enterprise and Emerging Technologies Division is responsible for the introduction, management and coordination of enterprise and emerging technologies (such as cloud, mobile, artificial intelligence and biometrics). The division is also responsible to managing Centres of Excellence and Competency Centres in support of these technologies to ensure that they are systematically and methodically. Further, the division is responsible for outreach and development of partnerships internationally (B5), nationally (across Canada) and internally to other government departments and agencies to further the Agencies. Key divisional activities include:
 - Providing the planning, analysis, design, development, and implementation of enterprise and emerging technologies;
 - Mobile Centre of Excellence;
 - Cloud Competency Centre;
 - Artificial Intelligence and Biometrics; and
 - Partnership and Outreach (internationally, nationally and internally).

The key to successful project implementation is adherence to effective delivery principles and active communication. Working with various partners, such as Shared Services Canada (SSC), CBSA ensures all required IM/IT initiatives are strategically aligned with operational requirements and are delivered on time, on budget and in accordance with project objectives. CBSA is seeking IM/IT professional services on an as and when required basis to provide critical key support for these initiatives.

4.0 Scope of the Work

The Contractor must provide IM/IT professional services in support of various CBSA projects within the BASD and in accordance with best practices. Projects may be in any of the following stages: inception, identification, in the midst of work, or delivery.

The work to be performed will be on an “as and when requested” basis as initiated through the issuance of Task Authorizations. Task Authorizations may be issued for any of the following resource categories:

Note to Bidders: Any resulting contract would only list the applicable Workstream(s) below that is(are) awarded to the successful bidder(s) in accordance with the evaluation methodology set out in this bid solicitation.

4.1 Workstream 1:

RESOURCE CATEGORY	LEVEL OF EXPERTISE
A.8 – System Analyst	Level 3
B.14 Technical Writer	Level 3
B.14 Technical Writer	Level 2
I.11 – Technology Architect	Level 3
P.5 – Project Executive	Level 3
A.1 – Application/Software Architect	Level 3
A.6 – Programmer/Software Developer	Level 3
A.6 – Programmer/Software Developer	Level 2
I.7 – Platform Analyst	Level 3
B.6 – Business System Analyst	Level 3
B.6 – Business System Analyst	Level 2
A.13. Web Designer	Level 2
B.1 – Business Analyst	Level 3

4.2 Workstream 2:

RESOURCE CATEGORY	LEVEL OF EXPERTISE
C.1 Strategic Information Technology Security Planning and Protection Consultant	Level 3

5.0 Tasks

The following resource categories will be responsible for, but not be limited to, doing the following:

Note to Bidders: Any resulting contract would only list the applicable Workstream(s) below that is(are) awarded to the successful bidder(s) in accordance with the evaluation methodology set out in this bid solicitation.

5.1 Workstream 1:

A.8 – System Analyst – Level 3

- Develop requirements, feasibility, cost, design and specification documents for systems;
- Implement systems to support projects, departments, organizations or stakeholders;
- Translate business requirements into systems design and specifications;
- Analyse and recommend alternatives and options for solutions; and
- Develop technical specifications for system development, design and implementation.

B.14 – Technical Writer – Levels 2 and 3

- Document help text, user manuals, technical documentation, web page content, etc.;
- Review documentation standards and the existing project documentation;
- Determine documentation requirements and makes plans for meeting them;
- Gather information concerning the features and functions provided by the developers;
- Assess the audience for the documents/manuals which are required and prepare a statement of purpose and scope for each;
- Develop a table of content for each document/manual and write or edit the required content;
- Investigate the accuracy of the information collected by making direct use of the material being documented;
- Prepare or coordinate the preparation of any required illustrations and diagrams;
- Design the layout of the documents and manuals; and
- Use word processing, desk top publishing and graphics software packages to produce final camera-ready copy.

Note: although a common list of tasks is presented for level 2 and level 3 resources, tasks defined in the task authorization may warrant a higher level resource as the work may be deemed more complex and involve more accountability and reporting directly to management.

I.11 – Technology Architect – Level 3

- Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements;
- Identify the policies and requirements that drive out a particular solution;
- Analyze and evaluate alternative technology solutions to meet business problems;
- Ensures the integration of all aspects of technology solutions;
- Monitor industry trends to ensure that solutions fit with government and industry directions for technology;
- Provide information, direction and support for emerging technologies;
- Perform impact analysis or technology changes;
- Provide support to applications and/or technical support teams in the proper application of existing infrastructure; and
- Review application and program design or technical infrastructure design to ensure adherence to standards and to recommend performance improvements.

P.5 – Project Executive - Level 3

- Manage several Project Managers, each responsible for an element of the project and its associated project team;
- Define and document project objectives, determine budget requirements;
- Meet with other organizational executives to ensure all organizational (internal and external) stakeholders are committed and moving forward on project and organizational goals;
- Resolve issues related to the project;
- Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools; and
- Project sign-off.

A.1 – Application/Software Architect – Level 3

- Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements;
- Identify the policies and requirements that drive out a particular solution;
- Analyze and evaluate alternative technology solutions to meet business problems;
- Ensures the integration of all aspects of technology solutions;
- Monitor industry trends to ensure that solutions fit with government and industry directions for technology;
- Analyze functional requirements to identify information, procedures and decision flows;
- Evaluate existing procedures and methods, identify and document database content, structure, and application sub-systems, and develop data dictionary;
- Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems;
- Define input/output sources, including detailed plan for technical design phase, and obtain approval of the system proposal; and
- Identify and document system specific standards relating to programming, documentation and testing, covering program libraries, data dictionaries, naming conventions, etc.

A.6 – Programmer/Software Developer – Levels 2 and 3

- Develop and prepare diagrammatic plans for solution of business, scientific and technical problems by means of computer systems of significant size and complexity;
- Analyze the problems outlined by the systems analysts/designers in terms of such factors as style and extent of information to be transferred to and from storage units, variety of items to be processed, extent of sorting, and format of final printed results;
- Select and incorporate available software programs;
- Design detailed programs, flow charts, and diagrams indicating mathematical computation and sequence of machine operations necessary to copy and process data and print the results;
- Translate detailed flow charts into coded machine instructions and confer with technical personnel in planning programs;
- Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel;
- Correct program errors by revising instructions or altering the sequence of operations; and
- Test instructions, and assemble specifications, flow charts, diagrams, layouts, programming and operating instructions to document applications for later modification or reference.

Note: although a common list of tasks is presented for level 2 and level 3 resources, tasks defined in the task authorization may warrant a higher level resource as the work may be deemed more complex and involve more accountability and reporting directly to management.

I.7 – Platform Analyst – Level 3

- Develop and document detailed statement of requirements for the proposed platform;
- Analyze functional requirements to identify information, procedures and decision flows;
- Evaluate existing procedures and methods, identify and documents database content, structure, and application sub-systems, and develop data dictionary;
- Define and document interfaces of manual to automated operations within sub-systems, to external systems and between new and existing systems;
- Define input/output sources, including detailed plan for technical design phase, and obtain approval for system proposals;
- Design and document in detail all system components, interfaces and operational environment;
- Design data structures and files, sub-systems and modules, programs, batch, on line, and production monitoring procedures, testing strategy and systems;
- Document system design, concepts and facilities, present and obtain approval of detailed system designs; and
- Produce operational systems including all forms, manuals, programs, data files and procedures.

B.6 – Business Systems Analyst – Levels 2 and 3

- Develop and document a detailed statement of requirements for the proposed alternative recommended in the preliminary analysis report;
- Perform business analyses of functional requirements to identify information, procedures, and decision flows;
- Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems, and develop data dictionary;
- Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes; and
- Support and use the selected departmental methodologies.

Note: although a common list of tasks is presented for level 2 and level 3 resources, tasks defined in the task authorization may warrant a higher level resource as the work may be deemed more complex and involve more accountability and reporting directly to management.

B.1 – Business Analyst – Level 3

- Develop and document statements of requirements for considered alternatives;
- Perform business analyses of functional requirements to identify information, procedures, and decision flows;
- Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;
- Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- Establish acceptance test criteria with client; and
- Support and use the selected departmental methodologies.

A.13 – Web Designer – Level 3

- Define architecture to be used in the web-based projects;
- Create and apply designs that maximize usability of existing objects;
- Perform architectural modeling to ensure consistency of the design with existing work;
- Select the development language to be used for the project;
- Assess the impact of the new requirements on existing web applications;
- Develop code based upon design and requirements documents;
- Write code to write to and read from the database;
- Unit test the code prior to releasing it for integration testing;
- Monitor the need for design changes as the project progresses;
- Develop test plans for testing the system;
- Ensure functionalities have been implemented according to specifications;
- Define assumptions and constraints of architecture with regard to physical structure and data collection; and
- Develop post-implementation plan for monitoring/tracking design stability.

In addition, all resource categories listed above will be responsible for, but not be limited to, doing the following:

- Planning and coordinating IM/IT project management activities including planning/coordination/guidance and process aspects;
- Working with a variety of stakeholders, provide expert IM/IT best practice advice/solutions for BASD projects;
- Provision of IM/IT documentation such as Statement of Requirements (SOR), project plans, feasibility reports, schedules, project management plans, risk management plans and lessons learned;
- Formulating and managing the IM/IT project plans by defining deliverables, identifying and providing resources, identifying key milestones, reviewing project progress against milestones, and engaging ongoing risk management;
- Developing and maintaining systems for the management and control of IM/IT requirements on projects in a manner compatible with client standards and guidelines. This includes communications and consultations with various stakeholders in the process;
- Support of the Project Authority to oversee IM/IT initiatives within BASD and on various IM/IT initiatives;
- Support of the Project Authority to oversee the change management process for IM/IT requirements;
- Provide monthly project progress reports;
- Conducting stakeholder meetings; and
- Working with project teams and other stakeholders, manage the IM/IT requirements on projects.

5.2 Workstream 2:

C.1 – Strategic Information Technology Security Planning and Protection Consultant – Level 3

- Review, analyze, and/or apply the Information Technology (IT) Security Policies, Procedures and Guidelines of International government, Federal, Provincial or Territorial government;
- Review, analyze, and apply the best practices, national or international computer law and ethics, IT Security architecture, and IT Security Risk Management Methodology;
- Develop vision papers delineating the way ahead to ensure that IT Security and cyber protection are business enablers;
- Conduct business function analysis and business impact assessments;
- Brief senior managers;
- Provide strategic assessments on technology trends and emerging technologies;
- Provide IT Security strategic planning and advice;
- Conduct feasibility studies, technology assessments and cost-benefit analyses, and propose system implementation plans for IT Security;
- Develop advanced R&D policy/strategy;
- Collect, collate and prioritize client IT Security and Information Infrastructure Protection requirements;
- Evaluate and assist in the selection of enterprise-wide technology tools;
- Review and prioritize IT Security and Information Infrastructure Protection programs;

- Develop strategic IT Security architecture vision, strategies and designs using the [Business Transformation Enablement Program](#) (BTEP) methodology and the Government Strategic Reference Model (GSRM);
- Develop IT Security programs and service designs using the following GSRM models: Program Logic Model, Program and Service Alignment Model, Service Integration and Accountability Model, State Transition Model, Information Model and Performance Model; and
- Develop and deliver training material relevant to the resource category.

6.0 Deliverables

The Contractor must be able to provide the following Deliverables based on the Task Authorization issued, which can include, but is not limited to:

- Written and verbal advice;
- Issues papers/Briefing Notes;
- Presentation decks and materials;
- Meeting facilitation and reports (e.g. Monthly Progress Reports);
- Management Action Plans;
- Work plans for specific initiatives;
- Business Cases;
- Business Planning, including risk planning and risk analysis, Risk Management Plans, and Statement of Requirements;
- Tracking against plans – including level of effort and resource estimation as part of IM/IT business planning;
- Trend Analyses;
- Fit/Gap Analyses;
- Guides, manuals, reports to be disseminated to various stakeholders as required;
- Meeting agendas, schedules and minutes;
- Synthesis report of facilitated meetings;
- Activity reports;
- Project Management Plans and project documentation such as Project Schedules, Lessons Learned, Progress Reports, Deficiency Reports, Project Forecasts, Road Maps; and Post Project Review Reports; and
- Conversation notes, design documentation, change management documentation, site inspection reports and other Work requested under the Task Authorization.

The level of support versus management services provided by the Contractor's resources for items listed above will vary depending on the needs of the project.

Deliverables to be submitted in hard and soft copies in the appropriate software formats (e.g. MS Project or MS Office Suite applications as identified by the Project Authority). All electronic deliverables must comply with departmental software standards, currently MS Office Suite latest version. Where required, BASD will provide the Contractor with the required forms and templates to meet these standards.

There may be a requirement for the Contractor's resources to access information available exclusively at Canada's facilities in the NCA. All documents developed and/or updated by each of the Contractor's resources must be provided to the Project Authority for review, approval and

signature (as required). All Work under this Contract must be accessible to the Project Authority at all times.

7.0 TECHNICAL ENVIRONMENT

The technical environment at BASD includes several technologies including, but not limited to:

- IBM DB2 on UNIX
- IBM PureData
- IBM Infosphere Suite
- IBM InfoSphere Change Data Capture
- IBM Infosphere Data Architect
- IBM SPSS
- IBM SPSS Modeler Server
- IBM Cognos Framework Manager
- IBM Cognos Business Intelligence Transformer
- IBM Cognos Administration
- IBM Cognos PowerPlay Studio
- IBM Cognos Software Development Kit
- SQL
- Sybase
- XML
- R
- Python
- ArcGIS
- MS Office
- Oracle JAVA
- SAP
- New and emerging technologies and software
- Any other IM/IT software application utilized within CBSA

8.0 Client Support

The Client will provide all documentation and information necessary for the Work.

CBSA will provide the resources with a workstation, computer and telephones, email address (where applicable and available) and all necessary materials to perform their functions. Some resources may be required to work off-site, which may require the use of a CBSA laptop or other computer.

CBSA will provide, subject to normal security requirements, and only to the specified resource personnel, access to identified databases or applications resident on CBSA computers or networks for the sole purpose of executing tasks associated with this Contract. CBSA, at its sole discretion, will identify the nature and characteristics of such access.

9.0 Work Location

The Contractor's resources will be required to work onsite at CBSA site offices in the NCA.

Solicitation No. - N° de l'invitation
47419-206529/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur
632e1

10.0 Travel

No travel related expenses or living expenses will be provided for travel to or from CBSA offices or sites within the NCA.

TASK AUTHORIZATION FORM FORMULAIRE D'AUTORISATION DE TÂCHES

PART 1 (completed by the Technical/Project Authority) / **PARTIE 1** (complété par le Responsable technique / Chargé du projet)

A. General Information / Informations générales

Contract Number / Numéro du contrat :

Contractor Name / Nom du Contracteur :

Task Authorization (TA) No.
N° de l'autorisation de tâches (AT) :

Commitment No.
N° de l'engagement :

Financial Coding
Code financier :

Date of Issuance
Date d'émission :

Response required by
Réponse requise
d'ici le :

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B. For Amendments Only / Aux fins de modification seulement

Amendment No. / N° de la modification :

Reason for the Amendment / Raison pour la modification :

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C. TA Requirements / Exigences relatives à l'AT

Required Resource(s) / Ressource(s) requise(s)

Category and Level Catégorie et Niveau	Estimated Level of Effort (days) / Niveau d'effort estimatif (jours)	Linguistic Profile / Profil linguistique	Required Level(s) of Security / Niveau(x) de sécurité requis
Strategic Information Technology Security Planning and Protection Consultant			

Statement of Work (tasks, deliverables, reports, etc.) / Énoncé des travaux (tâches, livrables, rapports, etc.)

See attached / Voir pièce jointe

Period of Services / Période de service:

Initial Start Date / Date de début initiale :

Initial End Date / Date de fin initiale :

Extended End Date (See Reason for the Amendment) / Date de fin prolongée (voir Raison pour la modification):

Option To Extend Initial End Date / Option pour prolonger la date de fin initiale

Optional End Date(S) / Date(s) de fin optionnelle(s)	Status / Statut
	<input type="radio"/> In Effect / en vigueur

Travel Requirement(s) / Exigence(s) de voyage : n/a

Work Location(s) / Lieu(x) de travail :

PART 2 (completed by the Contractor and/or the Technical/Project Authority) / **PARTIE 2** (complété par le Contracteur et/ou le Responsable technique / Chargé du projet)

Contractor Resource(s) and Estimated Cost / Ressource(s) du Contracteur et Coût total estimatif

Note: once approved, only the following resources may provide services under this TA. / Nota : une fois approuvée, seules les ressources suivantes peuvent fournir des services sous la présente AT

Name / Nom Category and Level / Catégorie et Niveau	PWGSC Security File No. / N° du dossier de sécurité TPSGC	Linguistic Profile / Profil linguistique	Per Diem Rate / Taux journalier	Estimated Level of Effort (days) / Niveau d'effort estimatif (jours)	Total Estimated Cost / Coût total estimatif

C.1 – Strategic Information Technology Security Pla					\$0.00
C.1 – Strategic Information Technology Security Pla					\$0.00
Estimated Cost / Coût estimatif					\$0.00
Total Estimated Cost / Coût total estimatif					\$0.00
Check applicable Basis of Payment / Cocher la Base de Paiement applicable :		Maximum Price / Prix Maximum :	<input type="checkbox"/>	Firm Price / Prix Ferme :	<input type="checkbox"/>

PART 3 - TA APPROVAL BY CANADA / PARTIE 3 - APPROBATION DE L'AT PAR LE CANADA

By signing this TA, the Technical Authority, the representative from the SPMMD of CBSA and/or the PWGSC Contracting Authority certify(ies) that the content of this TA is in accordance with the conditions of the Contract.	En apposant sa signature sur l'AT, l'autorité technique, le représentant de la DAGBS de l'ASFC et/ou l'autorité contractante de TPSGC atteste(nt) que le contenu de cette AT est conforme aux conditions du contrat.		
The client's authorization limit is \$300,000. When the value of a TA and its amendments (excluding Applicable Taxes) is in excess of this limit, the TA must be signed by the authorized client and forwarded to the PWGSC Contracting Authority for authorization.	La limite d'autorisation du client est \$300,000. Lorsque la valeur de l'AT et ses modifications (excluant les taxes applicables) dépasse cette limite, l'AT doit être signée par le client autorisé et transmise à l'autorité contractante de TPSGC pour autorisation,		
Name of Technical Authority / Nom de l'autorité technique _____	Date _____	Name of Contracting Authority / Nom de l'autorité contractante _____	Date _____
Signature _____		Signature _____	
Name of the representative from the SPMMD of CBSA / Nom d'un représentant de la DAGBS de l'ASFC _____	Date _____		
Signature _____			

PART 4 - CONTRACTOR SIGNATURE / PARTIE 4 - SIGNATURE DU CONTRACTEUR

Name and Title of individual authorized to sign on behalf of the Contractor / Nom et titre Signature de la personne autorisée à signer au nom de l'entrepreneur _____	Signature _____	Date _____
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**APPENDIX C TO ANNEX A
RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE**

To facilitate resource assessment, Contractors must prepare and submit a response to a draft Task Authorization using the tables provided in this Annex. When completing the resource grids, the specific information which demonstrates the requested criteria and reference to the page number of the résumé should be incorporated so that Canada can verify this information. The tables should not contain all the project information from the resume. Only the specific answer should be provided.

Note to Bidders: Any resulting contract would only list the applicable Workstream(s) below that is(are) awarded to the successful bidder(s) in accordance with the evaluation methodology set out in this bid solicitation.

WORKSTREAM 1

1.0 MANDATORY RESOURCE REQUIREMENTS

1.1 A.1 – Application Software Architect – Level 3

Name of proposed Resource: _____				
The Contractor MUST demonstrate that the proposed Application/Software Architect – Level 3 has:				
Criteria	Mandatory Requirement	Contractor's response		
		INSERT PAGE # OF RESUME	Met	Not Met
M.1	<p>A minimum of ten (10) years of experience designing and documenting architectural specifications for interfaces or integration between new and existing systems.</p> <p>For each project referenced*, the Contractor should provide the following details including, but not limited to:</p> <ul style="list-style-type: none"> - Name & description of client organization - Scope, objectives, project time frame - Description of the roles & responsibilities proposed resources in the project, process, or initiative. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
M.2	<p>A college or university degree or post-secondary diploma in Information Technology, Computer Science or Electrical Engineering.</p> <p>The Contractor should provide a readable copy of the degree/diploma in English or French with its response.</p>			

1.2 B.14 - Technical Writer – Level 3

<p>Name of proposed Resource: _____</p> <p>The Contractor MUST demonstrate that the proposed Technical Writer – Level 3 has:</p>				
Criteria	Mandatory Requirement	Contractor's response		
		INSERT PAGE # OF RESUME	Met	Not Met
M.1	<p>A minimum of ten (10) years of experience as a technical writer in the preparation of technical specifications for Requests for Proposals for IM/IT application development projects.</p> <p>For each project referenced*, the Contractor should provide the following details including but limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
M.2	<p>A college or university degree or post-secondary diploma.</p> <p>The Contractor should provide a readable copy of the degree/diploma in English or French with its response.</p>			

1.3 B.14 – Technical Writer – Level 2

<p>Name of proposed Resource: _____</p> <p>The Contractor MUST demonstrate that the proposed Technical Writer – Level 2 has:</p>				
Criteria	Mandatory Requirement	Contractor's response		
		INSERT PAGE # OF RESUME	Met	Not Met
M.1	<p>A minimum of seven (7) years of experience as a technical writer in the preparation of technical specifications for Requests for Proposals for IM/IT application development projects.</p> <p>For each project referenced*, the Contractor should provide the following:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
M.2	<p>A college or university degree or post-secondary diploma.</p> <p>The Contractor should provide a readable copy of the degree/diploma in English or French with its response.</p>			

1.4 I.11 - Technology Architect – Level 3

Name of proposed Resource: _____				
The Contractor MUST demonstrate that the proposed Technology Architect – Level 3 has:				
Criteria	Mandatory Requirement	Contractor's response		
		INSERT PAGE # OF RESUME	Met	Not Met
M.1	<p>A minimum of ten (10) years of experience as a Technology Architect developing technical architectures, frameworks and strategies to meet the business requirements and application requirements.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
M.2	<p>A college or university degree or post-secondary diploma in Information Technology, Computer Science or Electrical Engineering.</p> <p>The Contractor should provide a readable copy of the degree/diploma in English or French with its response.</p>			

1.5 P.5 - Project Executive – Level 3

Name of proposed Resource: _____				
The Contractor MUST demonstrate that the proposed Project Executive – Level 3 has:				
Criteria	Mandatory Requirement	Contractor's response		
		INSERT PAGE # OF RESUME	Met	Not Met
M.1	<p>A minimum of ten (10) years of experience as a Project Executive.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
M.2	<p>A minimum of ten (10) years of experience in documenting project deliverables, objectives, determining budget requirements and resolving issues related to a project.</p> <p>For each project referenced*, the Contractor should provide the following:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			

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M.3	<p>The proposed resource must be a member in good standing of one of the following recognized Professional Certifications:</p> <ul style="list-style-type: none">a) PMPb) Prosci ADKARc) ITIL <p>The Contractor should provide a readable copy of the certification in English or French with its response.</p>			
M.4	<p>A college or university degree or post-secondary diploma in Business Administration, Information Technology, Computer Science, Electrical Engineering, Economics or Commerce.</p> <p>The Contractor should provide a readable copy of the degree/diploma in English or French with its response.</p>			

1.6 A.8 – System Analyst – Level 3

Name of proposed Resource: _____				
The Contractor MUST demonstrate that the proposed System Analyst – Level 3 has:				
Criteria	Mandatory Requirement	Contractor's response		
		INSERT PAGE # OF RESUME	Met	Not Met
M.1	<p>A minimum of seven (7) years of experience developing requirements, feasibility, costs, designs, and specification documents for IM/IT systems.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
	<p>A college or university degree or post-secondary diploma in Information Technology, Computer Science or Electrical Engineering.</p> <p>The Contractor should provide a readable copy of the degree/diploma in English or French with its response.</p>			

1.7 A.6 - Programmer/Software Developer – Level 3

<p>Name of proposed Resource: _____</p>				
<p>The Contractor MUST demonstrate that the proposed Programmer/Software Developer – Level 3 has:</p>				
Criteria	Mandatory Requirement	Contractor's response		
		INSERT PAGE # OF RESUME	Met	Not Met
M.1	<p>A minimum of seven (7) years of experience as a Programmer/Software Developer in developing either web or mobile applications or any combination thereof using one or any combination of the following programming languages:</p> <ul style="list-style-type: none"> - Java - JavaScript - HTML 5 - CSS - C++ - Objective C - C# - Kotlin - React - .NET <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
M.2	<p>A college or university degree or post-secondary diploma in Information Technology, Computer Science or Electrical Engineering.</p> <p>The Contractor should provide a readable copy of the degree/diploma in English or French with its response.</p>			

1.8 A.6 - Programmer/Software Developer – Level 2

<p>Name of proposed Resource: _____</p>				
<p>The Contractor MUST demonstrate that the proposed Programmer/Software Developer – Level 2 has:</p>				
Criteria	Mandatory Requirement	Contractor's response		
		INSERT PAGE # OF RESUME	Met	Not Met
M.1	<p>A minimum of three (3) years of experience as a Programmer/Software Developer in developing either web or mobile applications or any combination thereof using one or any combination of the following programming languages:</p> <ul style="list-style-type: none"> - Java - JavaScript - HTML 5 - CSS - C++ - Objective C - C# - Kotlin - React - .NET <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
M.2	<p>A college or university degree or post-secondary diploma in Information Technology, Computer Science or Electrical Engineering.</p> <p>The Contractor should provide a readable copy of the degree/diploma in English or French with its response.</p>			

1.9 I.7 - Platform Analyst – Level 3

Name of proposed Resource: _____				
The Contractor MUST demonstrate that the proposed Platform Analyst – Level 3 has:				
Criteria	Mandatory Requirement	Contractor's response		
		INSERT PAGE # OF RESUME	Met	Not Met
M.1	<p>The proposed resource must have a minimum ten (10) years of experience as a platform analyst, developing and documenting detailed statement of requirements for the proposed platform(s).</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
M.2	<p>A college or university degree or post-secondary diploma in Information Technology, Computer Science or Electrical Engineering.</p> <p>The Contractor should provide a readable copy of the degree/diploma in English or French with its response.</p>			

1.10 B.1 - Business Analyst – Level 3

<p>Name of proposed Resource: _____</p> <p>The Contractor MUST demonstrate that the proposed Business Analyst – Level 3 has:</p>				
Criteria	Mandatory Requirement	Contractor's response		
		INSERT PAGE # OF RESUME	Met	Not Met
M.1	<p>The proposed resource must have a minimum of ten (10) years of experience performing business analyses of functional requirements to identify information, procedures, decision flows and documenting statements of requirements.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the roles and responsibilities of the proposed. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
M.2	<p>A college or university degree or post-secondary diploma in Business Administration, Commerce, Economics, Information Technology, Computer Science or Electrical Engineering</p> <p>The Contractor must provide a readable copy of the degree/diploma in English or French with its response.</p>			

1.11 B.6 - Business System Analyst – Level 3

Name of proposed Resource: _____				
The Contractor MUST demonstrate that the proposed Business System Analyst – Level 3 has:				
Criteria	Mandatory Requirement	Contractor's response		
		INSERT PAGE # OF RESUME	Met	Not Met
M.1	<p>A minimum of ten (10) years of experience performing business analyses of functional requirements to identify information, procedures, and decision flows.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
M.2	<p>A college or university degree or post-secondary diploma in Information Technology, Computer Science or Electrical Engineering.</p> <p>The Contractor should provide a readable copy of the degree/diploma in English or French with its response.</p>			

1.12 B.6 - Business Systems Analyst – Level 2

Name of proposed Resource: _____				
The Contractor MUST demonstrate that the proposed Business System Analyst – Level 2 has:				
Criteria	Mandatory Requirement	Contractor's response		
		INSERT PAGE # OF RESUME	Met	Not Met
M.1	<p>A minimum of five (5) years of experience performing business analyses of functional requirements to identify information, procedures, and decision flows.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
M.2	<p>A college or university degree or post-secondary diploma in Information Technology, Computer Science or Electrical Engineering.</p> <p>The Contractor should provide a readable copy of the degree/diploma in English or French with its response.</p>			

1.13 A.13 - Web Designer – Level 2

<p>Name of proposed Resource: _____</p>				
<p>The Contractor MUST demonstrate that the proposed Web Designer – Level 2 has:</p>				
Criteria	Mandatory Requirement	Contractor's response		
		INSERT PAGE # OF RESUME	Met	Not Met
M.1	<p>A minimum of five (5) years in completing initiatives that support Web Content Accessibility Guidelines.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
M.2	<p>A college or university degree or post-secondary diploma in Information Technology, Computer Science or Electrical Engineering.</p> <p>The Contractor should provide a readable copy of the degree/diploma in English or French with its response.</p>			

2.0 POINT RATED RESOURCE REQUIREMENTS

2.1 A.1 - Application/Software Architect – Level 3

<p>Name of proposed Resource: _____</p> <p>The Contractor SHOULD demonstrate that the proposed Application/Software Architect – Level 3 has:</p>				
Criteria	Rated Requirement	Maximum Points	Point Allocation	Substantiating Information, Cross Reference to Proposal
R.1	<p>More than five (5) years of experience as an application/software architect developing technical architectures, frameworks and strategies for application development projects to meet business and application requirements.</p> <p>For each project referenced*, the Contractor should provide the following details, including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	/5	<ul style="list-style-type: none"> 0 to 5 years = 0 points 5+ to 6 years = 1 point 6+ to 7 years = 2 points 7+ to 8 years = 3 points 8+ to 9 years = 4 points 9+ years = 5 points 	

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R.2	<p>Experience, in excess of M.1, designing and documenting architectural specifications for interfaces or integration between new and existing systems.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none">- Name and description of client organization;- Scope, objectives, project time frame; and- Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	/5	<ul style="list-style-type: none">• 0 to 10 years = 0 points• 10+ to 11 years = 1 point• 11+ to 12 years = 2 points• 12+ to 13 years = 3 points• 13+ to 14 years = 4 points• 14+ years = 5 points	
Total Points Available	10			
Minimum Pass Mark	7			

2.2 B.14 - Technical Writer – Level 3

<p>Name of proposed Resource: _____</p>				
<p>The Contractor SHOULD demonstrate that the proposed Technical Writer – Level 3 has:</p>				
Criteria	Rated Requirement	Maximum Points	Point Allocation	Substantiating Information, Cross Reference to Proposal
R.1	<p>More than ten (10) years of experience in developing technical documentation.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	/5	<ul style="list-style-type: none"> • 0 to 10 years = 0 points • 10+ to 11 years = 1 point • 11+ to 12 years = 2 points • 12+ to 13 years = 3 points • 13+ to 14 years = 4 points • 14+ years = 5 points 	
R.2	<p>Experience, within the past ten (10) years prior to the TA issuance date, in creating or authoring internal documentation and contract deliverables in support of large scale IM/IT application development projects*.</p> <p>For each project referenced**, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and 	/15	<ul style="list-style-type: none"> • 0 to 6 months = 0 points • 6+ months to 1 year = 1 point • 1+ to 2 years = 2 point • 2+ to 3 years = 3 points • 3+ to 4 years = 4 points • 4+ to 5 years = 5 points • 5+ to 6 years = 6 points • 6+ to 7 years = 7 points • 7+ to 8 years = 8 points • 8+ to 9 years = 9 points • 9+ years = 10 points <p>AND</p> <ul style="list-style-type: none"> ➤ 0 project = 0 points ➤ 1 project = 1 point 	

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<p>- Description of the project, roles and responsibilities of the proposed resource.</p> <p>*A large scale IM/IT application project is defined as an enterprise-wide application system project that operates in a corporate environment such as a business or government, designed to satisfy the needs of a large organization of 1000 employees or more rather than individual users. The project must have been valued over \$5 million dollars with a minimum of 18 months or longer to implement.</p> <p>**Each project referenced must be a minimum of 6 months duration to be considered.</p>		<ul style="list-style-type: none">➤ 2 projects = 2 points➤ 3 projects = 3 points➤ 4 projects = 4 points➤ 5+ projects = 5 points	
Total Points Available	20		
Minimum Pass Mark	14		

2.3 B.14 - Technical Writer – Level 2

<p>Name of proposed Resource: _____</p>				
<p>The Contractor SHOULD demonstrate that the proposed Technical Writer – Level 2 has:</p>				
Criteria	Rated Requirement	Maximum Points	Point Allocation	Substantiating Information, Cross Reference to Proposal
R.1	<p>More than five (5) years of experience in developing technical documentation.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced* must be a minimum of 6 months duration to be considered.</p>	/5	<ul style="list-style-type: none"> • 0 to 5 years = 0 points • 5+ to 6 years = 1 point • 6+ to 7 years = 2 points • 7+ to 8 years = 3 points • 8+ to 9 years = 4 points • 9+ years = 5 points 	
R.2	<p>Experience, within the past seven (7) years prior to the TA issuance date, in creating or authoring internal documentation and contract deliverables in support of large scale IM/IT application development projects*.</p> <p>For each project referenced**, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and 	/15	<ul style="list-style-type: none"> • 0 to 6 months = 0 points • 6+ months to 1 year = 2 points • 1+ to 2 years = 4 points • 2+ to 3 years = 6 points • 3+ to 4 years = 8 points • 4+ years = 10 points <p>AND</p> <ul style="list-style-type: none"> ➤ 0 project = 0 points ➤ 1 project = 1 point ➤ 2 projects = 2 points ➤ 3 projects = 3 points ➤ 4 projects = 4 points ➤ 5+ projects = 5 points 	

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	<p>- Description of the project, roles and responsibilities of the proposed resource.</p> <p>*A large scale IM/IT application project is defined as an enterprise-wide application system project that operates in a corporate environment such as a business or government, designed to satisfy the needs of a large organization of 1000 employees or more rather than individual users. The project must have been valued over \$5 million dollars with a minimum of 18 months or longer to implement.</p> <p>**Each project referenced must be a minimum of 6 months duration to be considered.</p>			
Total Points Available	20			
Minimum Pass Mark	14			

2.4 I.11 - Technology Architect – Level 3

<p>Name of proposed Resource: _____</p>				
<p>The Contractor SHOULD demonstrate that the proposed Technology Architect – Level 3 has:</p>				
Criteria	Rated Requirement	Maximum Points	Point Allocation	Substantiating Information, Cross Reference to Proposal
R.1	<p>A minimum of ten (10) years of experience in analyzing and evaluating current and alternative technology solutions to meet business requirements.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	/5	<ul style="list-style-type: none"> • 0 to 10 years = 0 points • 10+ to 11 years = 1 point • 11+ to 12 years = 2 points • 12+ to 13 years = 3 points • 13+ to 14 years = 4 points • 14+ years = 5 points 	
R.2	<p>More than five (5) years of experience in providing support to application or technical support teams, reviewing application and program design or technical design to ensure adherence to standards and recommendation of improvements.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; 	/5	<ul style="list-style-type: none"> • 0 to 5 years = 0 points • 5+ to 6 years = 1 points • 6+ to 7 years = 2 points • 7+ to 8 years = 3 points • 8+ to 9 years = 4 points • 9+ years = 5 points 	

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	<p>- Scope, objectives, project time frame; and</p> <p>- Description of the project, roles and responsibilities of the proposed resource.</p> <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
Total Points Available		10		
Minimum Pass Mark		7		

2.5 P.5 - Project Executive – Level 3

<p>Name of proposed Resource: _____</p>				
<p>The Contractor SHOULD demonstrate that the proposed Project Executive – Level 3 has:</p>				
Criteria	Rated Requirement	Maximum Points	Point Allocation	Substantiating Information, Cross Reference to Proposal
R.1	<p>Experience, in excess of M.1, as a Project Executive.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	/5	<ul style="list-style-type: none"> • 0 to 10 years = 0 points • 10+ to 11 years = 1 point • 11+ to 12 years = 2 points • 12+ to 13 years = 3 points • 13+ to 14 years = 4 points • 14+ years = 5 points 	
R.2	<p>More than seven (7) years of experience preparing detailed project plans, charts, change management and communication plans, tables and diagrams to assist in analyzing or displaying problems; working with a variety of standard project management tools.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and 	/5	<ul style="list-style-type: none"> • 0 to 7 years = 0 points • 7+ to 8 years = 1 point • 8+ to 9 years = 2 points • 9+ to 10 years = 3 points • 10+ to 11 years = 4 points • 11+ years = 5 points 	

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	<p>- Description of the project, roles and responsibilities of the proposed resource.</p> <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
R.3	<p>Experience, in excess of M.2, in documenting project deliverables, objectives, determining budget requirements and resolving issues related to a project.</p> <p>For each project referenced*, the Contractor should provide the following project details including but not limited to:</p> <p>- Name and description of client organization;</p> <p>- Scope, objectives, project time frame; and</p> <p>- Description of the project, roles and responsibilities of the proposed resource.</p> <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	/5	<ul style="list-style-type: none"> • 0 to 10 years = 0 points • 10+ to 11 years = 1 point • 11+ to 12 years = 2 points • 12+ to 13 years = 3 points • 13+ to 14 years = 4 points • 14+ years = 5 points 	
Total Points Available		15		
Minimum Pass Mark		10		

2.6 A.8 - System Analyst – Level 3

<p>Name of proposed Resource: _____</p>				
<p>The Contractor SHOULD demonstrate that the proposed System Analyst – Level 3 has:</p>				
Criteria	Rated Requirement	Maximum Points	Point Allocation	Substantiating Information, Cross Reference to Proposal
R.1	<p>Experience, in excess of M.1, developing requirements, feasibility, costs, designs, and specification documents for IM/IT systems.</p> <p>For each project referenced, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	/5	<ul style="list-style-type: none"> • 0 to 7 years = 0 points • 7+ to 8 years = 1 point • 8+ to 9 years = 2 points • 9+ to 10 years = 3 points • 10+ to 11 years = 4 points • 11+ years = 5 points 	
R.2	<p>More than seven (7) years of experience implementing systems to support projects, departments, organizations or businesses.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and 	/5	<ul style="list-style-type: none"> • 0 to 7 years = 0 points • 7+ to 8 years = 1 point • 8+ to 9 years = 2 points • 9+ to 10 years = 3 points • 10+ to 11 years = 4 points • 11+ years = 5 points 	

	<p>- Description of the project, roles and responsibilities of the proposed resource.</p> <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
R.3	<p>More than five (5) years of experience translating business requirements into systems design and specifications.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	/5	<ul style="list-style-type: none"> • 0 to 5 years = 0 points • 5+ to 6 years = 1 point • 6+ to 7 years = 2 points • 7+ to 8 years = 3 points • 8+ to 9 years = 4 points • 9+ years = 5 points 	
R.4	<p>More than five (5) years of experience developing technical specifications for systems development, designing and implementation.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. 	/5	<ul style="list-style-type: none"> • 0 to 5 years = 0 points • 5+ to 6 years = 1 point • 6+ to 7 years = 2 points • 7+ to 8 years = 3 points • 8+ to 9 years = 4 points • 9+ years = 5 points 	

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	*Each project referenced must be a minimum of 6 months duration to be considered.			
Total Points Available		20		
Minimum Pass Mark		14		

2.7 A.6 - Programmer/Software Developer – Level 3

<p>Name of proposed Resource: _____</p>				
<p>The Contractor SHOULD demonstrate that the proposed Programmer/Software Developer – Level 3 has:</p>				
Criteria	Rated Requirement	Maximum Points	Point Allocation	Substantiating Information, Cross Reference to Proposal
R.1	<p>More than seven (7) years of experience as a Programmer/Software Developer, developing and modifying code and software using one or any combination of the following programming languages:</p> <ul style="list-style-type: none"> - Java - JavaScript - HTML 5 - CSS - C++ - Objective C - C# - Kotlin - React - .NET - JEE - Angular <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	/5	<ul style="list-style-type: none"> • 0 to 7 years = 0 points • 7+ to 8 years = 1 point • 8+ to 9 years = 2 points • 9+ to 10 years = 3 points • 10+ to 11 years = 4 points • 11+ years = 5 points 	

<p>R.2</p>	<p>Experience, in excess of M.1, as a Programmer/Software Developer in developing either web or mobile applications or any combination thereof using one or any combination of the following programming languages:</p> <ul style="list-style-type: none"> - Java - JavaScript - HTML 5 - CSS - C++ - Objective C - C# - Kotlin - React - .NET <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	<p>/5</p>	<ul style="list-style-type: none"> • 0 to 7 years = 0 points • 7+ to 8 years = 1 point • 8+ to 9 years = 2 points • 9+ to 10 years = 3 points • 10+ to 11 years = 4 points • 11+ years = 5 points 	
<p>Total Points Available</p>	<p>10</p>			
<p>Minimum Pass Mark</p>	<p>7</p>			

2.8 A.6 - Programmer/Software Developer – Level 2

<p>Name of proposed Resource: _____</p>				
<p>The Contractor SHOULD demonstrate that the proposed Programmer/Software Developer – Level 2 has:</p>				
Criteria	Rated Requirement	Maximum Points	Point Allocation	Substantiating Information, Cross Reference to Proposal
R.1	<p>More than three (3) years of experience as a Programmer/Software Developer, developing and modifying code and software using one or any combination of the following programming languages:</p> <ul style="list-style-type: none"> - Java - JavaScript - HTML 5 - CSS - C++ - Objective C - C# - Kotlin - React - .NET - JEE - Angular <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	/5	<ul style="list-style-type: none"> • 0 to 3 years = 0 points • 3+ to 4 years = 1 point • 4+ to 5 years = 2 points • 5+ to 6 years = 3 points • 6+ to 7 years = 4 points • 7+ years = 5 points 	

<p>R.2</p>	<p>Experience, in excess of M.1, as a Programmer/Software Developer in developing either web or mobile applications or any combination thereof using one or any combination of the following programming languages:</p> <ul style="list-style-type: none"> - Java - JavaScript - HTML 5 - CSS - C++ - Objective C - C# - Kotlin - React - .NET <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	<p>/5</p>	<ul style="list-style-type: none"> • 0 to 3 years = 0 points • 3+ to 4 years = 1 point • 4+ to 5 years = 2 points • 5+ to 6 years = 3 points • 6+ to 7 years = 4 points • 7+ years = 5 points 	
<p>Total Points Available</p>	<p>10</p>			
<p>Minimum Pass Mark</p>	<p>7</p>			

2.9 I.7 – Platform Analyst – Level 3

<p>Name of proposed Resource: _____</p> <p>The Contractor SHOULD demonstrate that the proposed Platform Analyst – Level 3 has:</p>				
Criteria	Rated Requirement	Maximum Points	Point Allocation	Substantiating Information, Cross Reference to Proposal
R.1	<p>Experience as a platform analyst, in excess of M.1, developing and documenting detailed statement of requirements for the proposed platform(s).</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	/5	<ul style="list-style-type: none"> • 0 to 10 years = 0 points • 10+ to 11 years = 1 point • 11+ to 12 years = 2 points • 12+ to 13 years = 3 points • 13+ to 14 years = 4 points • 14+ years = 5 points 	
R.2	<p>More than five (5) years of experience in analyzing functional requirements, procedures and decision flows.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and 	/5	<ul style="list-style-type: none"> • 0 to 5 years = 0 points • 5+ to 6 years = 1 point • 6+ to 7 years = 2 points • 7+ to 8 years = 3 points • 8+ to 9 years = 4 points • 9+ years = 5 points 	

	<p>- Description of the project, roles and responsibilities of the proposed resource.</p> <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
<p>R.3</p>	<p>More than five (5) years of experience in defining and documenting interfaces of manual to automated operations with sub-systems, to external systems and between new and existing (legacy) systems.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <p>- Name and description of client organization;</p> <p>- Scope, objectives, project time frame; and</p> <p>- Description of the project, roles and responsibilities of the proposed resource.</p> <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	<p>/5</p>	<ul style="list-style-type: none"> • 0 to 5 years = 0 points • 5+ to 6 years = 1 point • 6+ to 7 years = 2 points • 7+ to 8 years = 3 points • 8+ to 9 years = 4 points • 9+ years = 5 points 	
<p>Total Points Available</p>	<p>15</p>			
<p>Minimum Pass Mark</p>	<p>10</p>			

2.10 B.1 - Business Analyst – Level 3

<p>Name of proposed Resource: _____</p> <p>The Contractor SHOULD demonstrate that the proposed Business Analyst – Level 3 has:</p>				
Criteria	Rated Requirement	Maximum Points	Point Allocation	Substantiating Information, Cross Reference to Proposal
R.1	<p>Experience, in excess of M.1, performing business analyses of functional requirements to identify information, procedures, decision flows and documenting statements of requirements.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	/5	<ul style="list-style-type: none"> • 0 to 10 years = 0 points • 10+ to 11 years = 1 point • 11+ to 12 years = 2 points • 12+ to 13 years = 3 points • 13+ to 14 years = 4 points • 14+ years = 5 points 	

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R.2	<p>More than five (5) years of experience evaluating procedures and methods, identifying and documenting items such as, but not limited to, database content, structure and application subsystems.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none">- Name and description of client organization;- Scope, objectives, project time frame; and- Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	/5	<ul style="list-style-type: none">• 0 to 5 years = 0 points• 5+ to 6 years = 1 point• 6+ to 7 years = 2 points• 7+ to 8 years = 3 points• 8+ to 9 years = 4 points• 9+ years = 5 points	
Total Points Available	10			
Minimum Pass Mark	7			

2.11 B.6 - Business System Analyst – Level 3

<p>Name of proposed Resource: _____</p>				
<p>The Contractor SHOULD demonstrate that the proposed Business System Analyst – Level 3 has:</p>				
Criteria	Rated Requirement	Maximum Points	Point Allocation	Substantiating Information, Cross Reference to Proposal
R.1	<p>Experience, in excess of M.1, performing business analyses of functional requirements to identify information, procedures, and decision flows.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	/5	<ul style="list-style-type: none"> • 0 to 10 years = 0 points • 10+ to 11 years = 1 point • 11+ to 12 years = 2 points • 12+ to 13 years = 3 points • 13+ to 14 years = 4 points • 14+ years = 5 points 	
R.2	<p>More than five (5) years of experience evaluating procedures and methods, identifying and documenting items such as, but not limited to, database content, structure and application subsystems.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p>	/5	<ul style="list-style-type: none"> • 0 to 5 years = 0 points • 5+ to 6 years = 1 point • 6+ to 7 years = 2 points • 7+ to 8 years = 3 points • 8+ to 9 years = 4 points • 9+ years = 5 points 	

	<p>- Name and description of client organization;</p> <p>- Scope, objectives, project time frame; and</p> <p>- Description of the project, roles and responsibilities of the proposed resource.</p> <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
<p>R.3</p>	<p>More than five (5) years of experience, within the last ten (10) years prior to the TA issuance date, performing facilitation activities during requirements gathering in conjunction with the business clients, partners and project team members to ensure business process components are properly identified and documented.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <p>- Name and description of client organization;</p> <p>- Scope, objectives, project time frame; and</p> <p>- Description of the project, roles and responsibilities of the proposed resource.</p> <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	<p>/5</p>	<ul style="list-style-type: none"> • 0 to 5 years = 0 points • 5+ to 6 years = 1 point • 6+ to 7 years = 2 points • 7+ to 8 years = 3 points • 8+ to 9 years = 4 points • 9+ years = 5 points 	
<p>Total Points Available</p>	<p>15</p>			
<p>Minimum Pass Mark</p>	<p>10</p>			

2.12 B.6 - Business System Analyst – Level 2

Name of proposed Resource: _____

The Contractor **SHOULD** demonstrate that the proposed Business System Analyst – Level 2 has:

Criteria	Rated Requirement	Maximum Points	Point Allocation	Substantiating Information, Cross Reference to Proposal
R.1	<p>Experience, in excess of M.1, performing business analyses of functional requirements to identify information, procedures, and decision flows.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	/5	<ul style="list-style-type: none"> • 0 to 5 years = 0 points • 5+ to 6 years = 1 point • 6+ to 7 years = 2 points • 7+ to 8 years = 3 points • 8+ to 9 years = 4 points • 9+ years = 5 points 	
R.2	<p>More than three (3) years of experience evaluating procedures and methods, identifying and documenting items such as, but not limited to, database content, structure and application subsystems.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p>	/5	<ul style="list-style-type: none"> • 0 to 3 years = 0 points • 3+ to 4 years = 1 point • 4+ to 5 years = 2 points • 5+ to 6 years = 3 points • 6+ to 7 years = 4 points • 7+ years = 5 points 	

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	<p>- Name and description of client organization;</p> <p>- Scope, objectives, project time frame; and</p> <p>- Description of the project, roles and responsibilities of the proposed resource.</p> <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
R.3	<p>More than three (3) years of experience, within the last ten (10) years prior to the TA issuance date, performing facilitation activities during requirements gathering in conjunction with the business clients, partners and project team members to ensure business process components are properly identified and documented.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <p>- Name and description of client organization;</p> <p>- Scope, objectives, project time frame; and</p> <p>- Description of the project, roles and responsibilities of the proposed resource.</p> <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	/5	<ul style="list-style-type: none"> • 0 to 3 years = 0 points • 3+ to 4 years = 1 point • 4+ to 5 years = 2 points • 5+ to 6 years = 3 points • 6+ to 7 years = 4 points • 7+ years = 5 points 	
Total Points Available		15		
Minimum Pass Mark		10		

2.13 A.13 - Web Designer – Level 2

<p>Name of proposed Resource: _____</p> <p>The Contractor SHOULD demonstrate that the proposed Web Designer – Level 2 has:</p>				
Criteria	Rated Requirement	Maximum Points	Point Allocation	Substantiating Information, Cross Reference to Proposal
R.1	<p>A minimum of five (5) years in completing initiatives that support Web Content Accessibility Guidelines.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	/5	<ul style="list-style-type: none"> • 0 to 5 years = 0 points • 5+ to 6 years = 1 point • 6+ to 7 years = 2 points • 7+ to 8 years = 3 points • 8+ to 9 years = 4 points • 9+ years = 5 points 	
R.2	<p>A minimum of five (5) years in completing initiatives that support Web Content Accessibility Guidelines for web applications.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and 	/5	<ul style="list-style-type: none"> • 0 to 5 years = 0 points • 5+ to 6 years = 1 point • 6+ to 7 years = 2 points • 7+ to 8 years = 3 points • 8+ to 9 years = 4 points • 9+ years = 5 points 	

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	- Description of the roles and responsibilities of the proposed resource. *Each project referenced must be a minimum of 6 months duration to be considered.			
Total Points Available		10		
Minimum Pass Mark		7		

WORKSTREAM 2

1.0 MANDATORY RESOURCE REQUIREMENTS

1.1 C.1 - Strategic Information Technology Security Planning and Protection Consultant – Level 3

Name of proposed Resource: _____				
The Contractor MUST demonstrate that the proposed Strategic Information Technology Security Planning and Protection Consultant – Level 3 has:				
Criteria	Mandatory Requirement	Contractor's response		
		INSERT PAGE # OF RESUME	Met	Not Met
M.1	<p>A minimum of seven (7) years of experience in completing initiatives that support an IT Security and Cyber Protection program.</p> <p>For each project referenced*, the Contractor should provide the following details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, and project time frame; and - Description of the roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
M.2	<p>A college or university degree or post-secondary diploma in Information Technology, Computer Science or Electrical Engineering.</p> <p>The Contractor should provide a readable copy of the degree/diploma in English or French with its response.</p>			

2.0 RATED RESOURCE REQUIREMENTS

2.1 C.1 - Strategic Information Technology Security Planning and Protection Consultant – Level 3

Name of proposed Resource: _____

The Contractor **SHOULD** demonstrate that the proposed Strategic Information Technology Security Planning and Protection Consultant – Level 3 has:

Criteria	Rated Requirement	Maximum Points	Point Allocation	Substantiating Information, Cross Reference to Proposal
<p>R.1</p>	<p>Experience, in excess of M.1, in completing initiatives that support an IT Security and Cyber Protection program.</p> <p>For each referenced project*, the Contractor should provide the following project details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	<p>/5</p>	<ul style="list-style-type: none"> • 0 to 7 years = 0 points • 7+ to 8 years = 1 point • 8+ to 9 years = 2 points • 9+ to 10 years = 3 points • 10+ to 11 years = 4 points • 11+ years = 5 points 	

<p>R.2</p>	<p>More than five (5) years of experience in the development of one or any combination of the following security programs and postures:</p> <ul style="list-style-type: none"> - Biometrics - RFID - access control - mobile security <p>For each referenced project*, the Contractor should provide the following project details including but not limited to:</p> <ul style="list-style-type: none"> - Name and description of client organization; - Scope, objectives, project time frame; and - Description of the project, roles and responsibilities of the proposed resource. <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>	<p>/5</p>	<ul style="list-style-type: none"> • 0 to 5 years = 0 points • 5+ to 6 years = 1 point • 6+ to 7 years = 2 points • 7+ to 8 years = 3 points • 8+ to 9 years = 4 points • 9+ years = 5 points 	
<p>R.3</p>	<p>More than five (5) years of experience, within the last ten (10) years prior to the TA issuance date, performing facilitation activities during requirements gathering in conjunction with the business clients, partners and project team members to ensure business process components are properly identified and documented.</p> <p>For each project referenced*, the Contractor should provide the following project details including but not limited to:</p> <ul style="list-style-type: none"> - Name & description of client organization; - Scope, objectives, project time frame; and 	<p>/5</p>	<ul style="list-style-type: none"> • 0 to 5 years = 0 points • 5+ to 6 years = 1 point • 6+ to 7 years = 2 points • 7+ to 8 years = 3 points • 8+ to 9 years = 4 points • 9+ years = 5 points 	

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	<p>- Description of the project, roles and responsibilities of the proposed resource.</p> <p>*Each project referenced must be a minimum of 6 months duration to be considered.</p>			
Total Points Available	15			
Minimum Pass Mark	10			

SECURITY REQUIREMENTS CHECK LIST (SRCL)
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE

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

**PART A (continued) / PARTIE A (suite)**

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC Information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? No Yes
Non Oui

If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :

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

Short Title(s) of material / Titre(s) abrégé(s) du matériel :
Document Number / Numéro du document :

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

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

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

Special comments:

Commentaires spéciaux : _____

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

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

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? No Yes
Non Oui

If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté? No Yes
Non Oui

PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)**INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS**

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

11. b) Will the supplier be required to safeguard COMSEC information or assets?
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC? No Yes
Non Oui

PRODUCTION

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

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

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

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

**PART C - (continued) / PARTIE C - (suite)**

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

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

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

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

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).



Contract Number / Numéro du contrat

47419-206529

 Security Classification / Classification de sécurité
 UNCLASSIFIED

PART D - AUTHORIZATION / PARTIE D - AUTORISATION

13. Organization Project Authority / Chargé de projet de l'organisme

Name (print) - Nom (en lettres moulées)	Title - Titre	Signature
Tony Utano	Executive Director	
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel
613-858-4710		antonio.utano@cbsa-astc.gc.ca
Date: March 6/19		

14. Organization Security Authority / Responsable de la sécurité de l'organisme

Name (print) - Nom (en lettres moulées)	Title - Titre	Signature
Sean Daniel	Physical Security Adv.	
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel
343 291 5295		sean.daniel@cbsa-astc.gc.ca
Date: 7 March 2019		

15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached?

Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?

 No
 Yes

16. Procurement Officer / Agent d'approvisionnement

Name (print) - Nom (en lettres moulées)	Title - Titre	Signature
Francis Lapalme	A/Supply Team Leader	Lapalme, Francis
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel
613-858-9912		francis.lapalme@tpsgc-pwgsc.gc.ca
Date		

 Digitally signed by Lapalme, Francis
 Date: 2019.06.03 11:55:13 -04'00'

17. Contracting Security Authority / Autorité contractante en matière de sécurité

Name (print) - Nom (en lettres moulées)	Title - Titre	Signature
		Saumur, Jacques O
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel
Date		

 Digitally signed by Saumur, Jacques O
 DN: c=CA, o=GC, ou=PWGSC-TPSGC, cn=Saumur, Jacques O
 Date: 2017.02.02 13:38:31 -05'00'

Jacques Saumur
 Contract Security Officer
 Contracts Security Division | Division des contrats sécurité /
 Contract Security Program | Programme de sécurité des contrats /
 Public Services and Procurement Canada | Services publics et Approvisionnement Canada
 Jacques.Saumur@tpsgc-pwgsc.gc.ca
 Telephone | Téléphone 613-948-1732
 Facsimile | Télécopieur 613-948-1712

Security Requirement Checklist (SRCL) Supplemental Security Guide

Multiple Levels of Personnel Screening: Security Classification Guide			
<small>To be completed in addition to SRCL question 10.a) when multiple levels of personnel screening are therein identified. Indicate which personnel screening levels are required for which portions of the work/access involved in the contract.</small>			
Level of Personnel Clearance (e.g. Reliability, Secret)	Position / Description/Task	Access to sites and/or information. Levels of Information to be accessed.	Citizenship Restriction (if any)
Reliability	A.8 – System Analyst – Level 3	No Restrictions	N/A
Reliability	B.14 Technical Writer - Level 3	No Restrictions	N/A
Reliability	B.14 Technical Writer - Level 2	No Restrictions	N/A
Reliability	I.11 – Technology Architect - Level 3	No Restrictions	N/A
Reliability	P.5 – Project Executive - Level 3	No Restrictions	N/A
Reliability	A.1 – Application/Software Architect - Level 3	No Restrictions	N/A
Reliability	A.6 – Programmer/Software Developer - Level 3	No Restrictions	N/A
Reliability	A.6 – Programmer/Software Developer - Level 2	No Restrictions	N/A
Reliability	I.7 – Platform Analyst – Level 3	No Restrictions	N/A
Reliability	B.1 – Business Analyst - Level 3	No Restrictions	N/A
Reliability	B.6 – Business Systems Analyst - Level 3	No Restrictions	N/A
Reliability	B.6 – Business Systems Analyst - Level 2	No Restrictions	N/A
Reliability	C.1 Strategic Information Technology Security Planning and Protection Consultant - Level 3	No Restrictions	N/A
Reliability	A.13. Web Designer - Level 2	No Restrictions	N/A

Security Requirement Checklist (SRCL) Supplemental Security Guide

Secret	A.8 – System Analyst – Level 3	No Restrictions	N/A
Secret	B.14 Technical Writer - Level 3	No Restrictions	N/A
Secret	B.14 Technical Writer - Level 2	No Restrictions	N/A
Secret	I.11 – Technology Architect - Level 3	No Restrictions	N/A
Secret	P.5 – Project Executive - Level 3	No Restrictions	N/A
Secret	A.1 – Application/Software Architect - Level 3	No Restrictions	N/A
Secret	A.6 – Programmer/Software Developer - Level 3	No Restrictions	N/A
Secret	A.6 – Programmer/Software Developer - Level 2	No Restrictions	N/A
Secret	I.7 – Platform Analyst – Level 3	No Restrictions	N/A
Secret	B.1 – Business Analyst - Level 3	No Restrictions	N/A
Secret	B.6 – Business Systems Analyst - Level 3	No Restrictions	N/A
Secret	B.6 – Business Systems Analyst - Level 2	No Restrictions	N/A
Secret	C.1 Strategic Information Technology Security Planning and Protection Consultant - Level 3	No Restrictions	N/A
Secret	A.13. Web Designer - Level 2	No Restrictions	N/A