

<b>SOLUTION-BASED INFORMATICS PROFESSIONAL SERVICES (SBIPS)</b> <b>REQUEST FOR PROPOSAL (RFP) – COVER SHEET</b> <b>Title: Cognos to Power BI Data Transition</b>	
<b>Solicitation Number:</b>	<b>INFC-2023-24-PS4239-001</b>
<b>Date of RFP:</b>	October 6 <sup>th</sup> , 2023
<b>Procurement Officer:</b>	Alexander Caro
<b>Address for proposal delivery: Bids must be sent via email only to:</b> E-mail: <a href="mailto:procurement-appvisionnement@infc.gc.ca">procurement-appvisionnement@infc.gc.ca</a>	
<b>Bid Solicitation Closure:</b>	<b>October 23<sup>rd</sup>, 2023 @ 14:00 (2 PM) E.S.T.</b>
Infrastructure Canada (INFC) is requesting proposals for Cognos to Power BI Data Transition services, under the Solutions-Based Informatics Professional Services (SBIPS) Supply Arrangement, as detailed in this RFP. INFC will consider entering into a contract with the supplier that submits the most suitable proposal as determined by the evaluation factors set out in this RFP. One (1) contract will be awarded as a result of the evaluation of the responses to this RFP. Neither the qualifying proposal that scores the highest points nor the one that contains the lowest cost will necessarily be accepted. INFC reserves the right to accept any proposal as submitted without prior negotiations.	
This Request for Proposal consists of the following:  This cover page Part 1 - GENERAL INFORMATION Part 2 - BIDDER INSTRUCTIONS Part 3 - BID PREPARATION INSTRUCTIONS Part 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION Part 5 - CERTIFICATIONS AND ADDITIONAL INFORMATION Part 6 – SECURITY, FINANCIAL AND OTHER REQUIREMENTS Part 7 - RESULTING CONTRACT CLAUSES	
<b>Bidder's Name and Address:</b>	
<b>Telephone number:</b>	<b>E-mail:</b>
<b>Bidder's Signature:</b> The Bidder's signature indicates acceptance of the terms and conditions governing this Request for Proposal and certifies the content of the attached bidder's proposal is accurate. It also constitutes acknowledgement of receipt and acceptance of all documents listed above. The Bidder also recognizes having read and understood each and all terms and conditions in this RFP contained in the documents or incorporated by reference.	
_____	_____
<b>Signature</b>	<b>Date</b>

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**HIGH COMPLEXITY BID SOLICITATION AND  
RESULTING CONTRACT CLAUSES  
FOR A CONTRACT AGAINST A SUPPLY ARRANGEMENT FOR  
SOLUTIONS-BASED INFORMATICS PROFESSIONAL SERVICES  
(SBIPS)  
FOR  
INFRASTRUCTURE CANADA**

## Table of Contents

<b>PART 1 - GENERAL INFORMATION .....</b>	<b>4</b>
1.1 INTRODUCTION.....	4
1.2 SUMMARY .....	4
1.3 DEBRIEFINGS.....	5
<b>PART 2 - BIDDER INSTRUCTIONS .....</b>	<b>6</b>
2.1 STANDARD INSTRUCTIONS, CLAUSES AND CONDITIONS.....	6
2.2 SUBMISSION OF BIDS.....	6
2.3 FORMER PUBLIC SERVANT.....	6
2.4 ENQUIRIES - BID SOLICITATION.....	7
2.5 APPLICABLE LAWS.....	8
2.6 IMPROVEMENT OF REQUIREMENT DURING SOLICITATION PERIOD.....	8
<b>PART 3 - BID PREPARATION INSTRUCTIONS.....</b>	<b>9</b>
3.1 BID PREPARATION INSTRUCTIONS .....	9
SECTION I: TECHNICAL BID.....	11
SECTION II: FINANCIAL BID .....	12
SECTION III: CERTIFICATIONS .....	12
<b>PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION .....</b>	<b>13</b>
4.1 EVALUATION PROCEDURES.....	13
4.2 BASIS OF SELECTION.....	14
<b>PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION .....</b>	<b>16</b>
5.1 CERTIFICATIONS PRECEDENT TO CONTRACT AWARD AND ADDITIONAL INFORMATION .....	16
<b>PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS.....</b>	<b>17</b>
6.1 SECURITY REQUIREMENTS .....	17
<b>PART 7 - RESULTING CONTRACT CLAUSES .....</b>	<b>18</b>
7.1 REQUIREMENT .....	18
7.2 STANDARD CLAUSES AND CONDITIONS.....	18
7.3 SECURITY REQUIREMENT.....	19
7.4 CONTRACT PERIOD .....	19
7.5 AUTHORITIES .....	19
7.6 PROACTIVE DISCLOSURE OF CONTRACTS WITH FORMER PUBLIC SERVANTS .....	20
7.7 PAYMENT .....	20
7.8 INVOICING INSTRUCTIONS .....	22
7.9 CERTIFICATIONS AND ADDITIONAL INFORMATION.....	22
7.10 APPLICABLE LAWS.....	22

7.11	PRIORITY OF DOCUMENTS .....	22
7.12	FOREIGN NATIONALS (CANADIAN CONTRACTOR OR FOREIGN CONTRACTOR) (TO BE COMPLETED AT CONTRACT AWARD) .....	22
7.13	INSURANCE REQUIREMENTS .....	23
7.14	LIMITATION OF LIABILITY – INFORMATION MANAGEMENT/INFORMATION TECHNOLOGY .....	23
7.15	JOINT VENTURE CONTRACTOR (TO BE COMPLETED OR DELETED, AS APPLICABLE, AT CONTRACT AWARD) .....	24
7.16	SAFEGUARDING ELECTRONIC MEDIA.....	25
7.17	DISPUTE RESOLUTION.....	25
7.18	IDENTIFICATION PROTOCOL RESPONSIBILITIES.....	25
<b>ANNEX A</b>	.....	<b>26</b>
	STATEMENT OF WORK .....	26
<b>ANNEX B</b>	.....	<b>29</b>
	BASIS OF PAYMENT .....	29
<b>ANNEX C</b>	.....	<b>30</b>
	SECURITY REQUIREMENTS CHECK LIST .....	30
<b>ATTACHMENT 1 TO PART 3</b>	.....	<b>33</b>
	BID SUBMISSION FORM .....	33
<b>ATTACHMENT 2 TO PART 3</b>	.....	<b>35</b>
	PRICING SCHEDULE .....	35
<b>ATTACHMENT 1 TO PART 4</b>	.....	<b>36</b>
	TECHNICAL EVALUATION CRITERIA .....	36
<b>ATTACHMENT 2 TO PART 4</b>	.....	<b>42</b>
	CUSTOMER REFERENCE CONTACT INFORMATION FORM.....	42

## **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, 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, the Security Requirements Checklist, the Electronic Payment Instruments, and any other annexes.

### **1.2 Summary**

- 1.2.1 This bid solicitation is being issued to satisfy the requirement of Infrastructure Canada (the "**Client**") for Solutions-Based Informatics Professional Services (SBIPS) under the SBIPS Supply Arrangement (SA) method of supply.
- 1.2.2 It is intended to result in the award of one (1) contract. The contract will be from contract award to 31 March 2024.
- 1.2.3 There is one irrevocable option allowing Canada to extend the term of the contract by three additional months.
- 1.2.4 The evaluation will be based only on Corporate Criteria.
- 1.2.5 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](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.
- 1.2.6 The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Colombia Free Trade Agreement (CColFTA), the Canada-Panama Free Trade Agreement (CPanFTA), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), the Canada-Korea Free Trade Agreement (CKFTA) and the Canadian Free Trade Agreement (CFTA).

- 1.2.7 Considering accessibility criteria and features is obligatory with this requirement. For additional information consult the [Treasury Board Contracting Policy](#).
- 1.2.8 The SBIPS Supply Arrangement EN537-05IT01 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 SBIPS SA.
- 1.2.9 All SBIPS SA Holders currently holding a SBIPS SA for Tier 1 in the National Capital Region under the EN537-05IT01 series of SA's are invited to bid on this requirement.
- 1.2.10 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 #EN537-05IT01 as that joint venture at the time of bid closing in order to submit a bid.

### **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 in writing, by telephone or in person.

## **PART 2 - BIDDER INSTRUCTIONS**

### **2.1 Standard Instructions, Clauses and Conditions**

- 2.1.1 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) (https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) issued by Public Works and Government Services Canada.
- 2.1.2 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.
- 2.1.3 The [2003](#) (2023-06-08) 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.
- 2.1.4 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 Arrangements (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.

### **2.2 Submission of Bids**

- 2.2.1 Unless specified otherwise in the RFP, bids must be received by the Contract Authority at the location identified, by the date, time and place indicated on page 1 of the solicitation. Bidders should ensure that the bid includes the company name, return address and bid solicitation number, and that the solicitation closing date and time are clearly visible on the bid.
- 2.2.2 Canada will not be responsible for any electronic bid received at destination after the closing date and time, even if it was submitted before.

### **2.3 Former Public Servant**

#### **2.3.1 Information Required**

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.

#### **2.3.2 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:

- a. an individual;
- b. an individual who has incorporated;
- c. a partnership made of former public servants; or

- d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"lump sum payment 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.

### 2.3.3 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:

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

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with Contracting Policy Notice: 2019-01 and the Guidelines on the Proactive Disclosure of Contracts.

### 2.3.4 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:

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

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

## 2.4 Enquiries - Bid Solicitation

2.4.1 All enquiries must be submitted in writing to the Contracting Authority no later than two (2) calendar days before the bid closing date. Enquiries received after that time may not be answered.

2.4.2 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 to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

## **2.5 Applicable Laws**

- 2.5.1 Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.
- 2.5.2 Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their 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 reason 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 at least 10 days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.



### **PART 3 - BID PREPARATION INSTRUCTIONS**

#### **3.1 Bid Preparation Instructions**

3.1.1 Canada requests that the Bidder submit its bid in separately bound sections as follows:

Section I: Technical Bid  
Section II: Financial Bid  
Section III: Certifications  
Section IV: Signed RFP Cover Page (1 soft copy in PDF format)

3.1.2 Canada requests that the Bidder submit its bid in accordance with article 2.2 of this RFP. The Bidder must provide its bid in a single transmission. Canada's email servers have the capacity to receive emails up to 20MB in size with multiple documents, up to 4MB per individual attachment.

3.1.3 Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.

3.1.4 **Format for Bid.** Canada requests that bidders follow the format instructions described below in the preparation of their bid:

- a. use a numbering system that corresponds to the bid solicitation;
- b. 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;
- c. include a table of contents; and
- d. soft copies will be accepted in any of the following electronic formats:
  - Portable Document Format .pdf,
  - Microsoft Word 97/2000 (.doc),
  - Microsoft Excel 97/2000 (.xls).

3.1.5 **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 [Policy on Green Procurement](https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573) (https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573). To assist Canada in reaching its objectives, bidders must submit electronic copies.

#### **3.1.6 Submission of Only One Bid**

- a. 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.
- b. 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.
- c. Individual members of a joint venture cannot participate in another bid, either by submitting a bid alone or by participating in another joint venture.

### 3.1.7 Joint Venture Experience

- a. 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.

- b. 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.

- c. 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.

- d. 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.

### Section I: Technical Bid

- a. **Bid Submission Form.** Bidders are requested to include the Bid Submission Form – Attachment 1 to Part 3 - with their bid. 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.
- b. In their technical bid, Bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability in a thorough, concise and clear manner for carrying out the work.
- c. The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that Bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, Bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.
- d. **Customer Reference Contact Information**
  - i. The Bidder must provide customer references. The customer reference must each confirm, if requested by Canada, the facts identified in the Bidder's bid, as required by Attachment 1 to Part 4.
  - ii. The form of question to be used to request confirmation from customer references is as follows:

*“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.*
  - iii. For each customer reference, the Bidder must, at a minimum, provide the name, telephone number and e-mail address for a contact person.

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

**Section II: Financial Bid**

- a. **Price.** Bidders must submit their financial bid in accordance with the Pricing Schedule detailed at Attachment 2 to Part 3. The total amount of Applicable Taxes must be shown separately.
- b. **Electronic Payment of Invoices – Bid.** The bidder accepts payment of invoices by Direct Deposit.

**Section III: Certifications**

Bidders must submit the certifications and additional information required under Part 5.

## **PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION**

### **4.1 Evaluation Procedures**

- a. Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria. There are several steps in the evaluation process, which are described below. Even though the evaluation and selection will be conducted in steps, the fact that Canada has proceeded to a later step does not mean that Canada has conclusively determined that the Bidder has successfully passed all the previous steps. Canada may conduct steps of the evaluation in parallel.
- b. An evaluation team composed of representatives of Canada will evaluate the bids.
- c. In addition to any other time periods established in the bid solicitation:
  - i. **Requests for Clarifications:** If Canada seeks clarification or verification from the Bidder about its bid, the Bidder will have 2 working days (or a longer period if specified in writing by the Contracting Authority) to provide the necessary information to Canada. Failure to meet this deadline will result in the bid being declared non-responsive.
  - ii. **Requests for Further Information:** If Canada requires additional information in order to do any of the following pursuant to the Section entitled "Conduct of Evaluation" in 2003, Standard Instructions - Goods or Services - Competitive Requirements:
    - (A) verify any or all information provided by the Bidder in its bid; or
    - (B) contact any or all references supplied by the Bidder to verify and validate any information submitted by the Bidder,the Bidder must provide the information requested by Canada within 2 working days of a request by the Contracting Authority.
  - iii. **Extension of Time:** If additional time is required by the Bidder, the Contracting Authority may grant an extension in his or her sole discretion.

#### **4.1.1 Technical Evaluation**

- 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 1 to Part 4.
- 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 1 to Part 4.
- c. Reference Checks:
  - i. Whether or not to conduct reference checks is discretionary. However, if Canada chooses to conduct reference checks for any given rated or mandatory requirement, it will check the references for that requirement for the Bidder to be recommended for contract award.

- ii. Canada will conduct the reference check in writing by email. 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 5 working days will not be extended to provide additional time for the new contact to respond.
- 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.

#### **4.1.2 Financial Evaluation**

SACC Manual Clause [A0220T](#) (2014-06-26), Evaluation of Price – Bid.

For bid evaluation and contractor selection purposes only, the evaluated price of a bid will be determined in accordance with the Pricing Schedule detailed in Attachment 2 to Part 3.

#### **4.2 Basis of Selection**

##### **4.2.1 Basis of Selection - Highest Combined Rating of Volume of Work, Technical Merit, and Price**

- a. To be declared responsive, a bid must:
  - i. comply with all the requirements of the bid solicitation; and
  - ii. meet all mandatory criteria; and
  - iii. include the completion of sub-paragraphs a. to d. of paragraph 9 under Tasks and Deliverables in the Statement of Work (SOW); and
  - iv. include, as a minimum, the completion of the six complex migrations noted in sub-paragraph e. of paragraph 9 under Tasks and Deliverables in the SOW; and
  - v. obtain the required minimum of 280 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 440 points.
- b. Bids not meeting i. or ii. or iii. or iv. or v. will be declared non-responsive.
- c. The selection will be based on the highest responsive combined rating of volume of work, technical merit, and price. The ratio will be 40% for the volume of work, 40% for the technical merit and 20% for the price.

- d. To establish the score for volume of work, each responsive bid will be prorated against the bid committing to the largest number of migrations and multiplied by the ratio of 40%.
- e. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 40%.
- f. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and multiplied by the ratio of 20%.
- g. For each responsive bid, the scores for volume of work, technical merit and pricing will be added to determine its combined rating.
- h. Neither the responsive bid obtaining the highest score for volume of work nor the one with the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating for volume of work, technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 40/40/20 ratio of volume of work, technical merit and price, respectively. The total available points for volume of work is 30, the total available points for technical merit is 135, and the lowest evaluated price is \$45,000 (45).

<b>Basis of Selection - Highest Combined Rating Volume of Work (40%), Technical Merit (40%), Price (20%)</b>				
		<b>Bidder 1</b>	<b>Bidder 2</b>	<b>Bidder 3</b>
<b>Number of Migrations (Dashboards and Reports)</b>		25/30	27/30	20/30
<b>Overall Technical Score</b>		115/135	100/135	92/135
<b>Bid Evaluated Price</b>		\$55,000.00	\$50,000.00	\$45,000.00
<b>Calculations</b>	<b>Migrations Score</b>	$25/27 \times 40 = 37.04$	$27/27 \times 40 = 40$	$20/27 \times 40 = 29.63$
	<b>Technical Merit Score</b>	$115/135 \times 40 = 34.07$	$100/135 \times 40 = 29.63$	$92/135 \times 40 = 27.26$
	<b>Pricing Score</b>	$45/55 \times 20 = 16.36$	$45/50 \times 20 = 18$	$45/45 \times 20 = 20$
<b>Combined Rating</b>		87.47	87.63	76.89
<b>Overall Rating</b>		2nd	1st	3rd

## **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 the Bidder's certification. 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.

#### **5.1.1 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](#)" list available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's website](#).

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](#)" list at the time of contract award.

#### **5.1.2 Submission of Only One Bid**

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



## **PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS**

### **6.1 Security Requirements**

- 6.1.1 At the date of bid closing, the following conditions must be met:
- (a) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
  - (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses; and
  - (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.
- 6.1.2 In the case of a joint venture bidder, each member of the joint venture must meet the security requirements.
- 6.1.3 For additional information on security requirements, Bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

## PART 7 - RESULTING CONTRACT CLAUSES

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

### 7.1 Requirement

- 7.1.1 \_\_\_\_\_ (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.
- 7.1.2 **Client:** Under the Contract, the "**Client**" is Infrastructure Canada.
- 7.1.3 **Reorganization of Client:** The Contractor's obligation to perform the Work will not be affected by (and no additional fees will be payable as a result of) the renaming, reorganization, reconfiguration, or restructuring of any Client. The reorganization, reconfiguration and restructuring of the Client includes the privatization of the Client, its merger with another entity, or its dissolution, where that dissolution is followed by the creation of another entity or entities with mandates similar to the original Client. In connection with any form of reorganization, Canada may designate another department or government body as the Contracting Authority or Technical Authority, as required to reflect the new roles and responsibilities associated with the reorganization.
- 7.1.4 **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 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) (https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) issued by Public Works and Government Services Canada.

#### 7.2.1 General Conditions

[2035](#) (2022-12-01) 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:

04. 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.
05. 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.

06. The Contractor will have no claim for damages, compensation, loss of profit, allowance arising out of any termination notice given by Canada under this section except to the extent that this section expressly provides. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.

## **7.2.2 Supplemental General Conditions**

4013 (2022-06-20) Compliance with on-site measures, standing orders, policies, and rules, apply to and form part of the Contract.

## **7.3 Security Requirement**

The following security requirements (SRCL and related clauses provided by the Contract Security Program) apply and form part of the Contract:

1. The contractor/offeror must, at all times during the performance of the contract/standing offer, hold a valid designated organization screening (DOS), issued by the Contract Security Program (CSP), Public Works and Government Services Canada (PWGSC).
2. The contractor/offeror personnel requiring access to protected information, assets or sensitive work site(s) must each hold a valid reliability status, granted or approved by the CSP, PWGSC.
3. The contractor/offeror must not remove any protected information or assets from the identified work site(s), and the contractor/offeror must ensure that its personnel are made aware of and comply with this restriction.
4. Subcontracts which contain security requirements are not to be awarded without the prior written permission of the CSP, PWGSC.
5. The contractor/offeror must comply with the provisions of the:
  - a. Security Requirements Check List and security guide (if applicable), attached at Annex C; and
  - b. Contract Security Manual (latest edition).

## **7.4 Contract Period**

**7.4.1 Contract Period.** The "Contract Period" is the entire period of time during which the Contractor is obliged to perform the Work, which includes:

- a. the "Initial Contract Period", which begins on the date the Contract is awarded and ends 31 March 2024; and
- b. the period during which the Contract is extended, if Canada chooses to exercise any options set out in the Contract.

## **7.4.2 Option to Extend the Contract**

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to three (3) additional months under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

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.

## **7.5 Authorities**

### **7.5.1 Contracting Authority**

The Contracting Authority for the Contract will be indicated after the contract is awarded:

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

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

### 7.5.2 Project Authority

The Project Authority for the Contract will be indicated after the contract is awarded:

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

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

### 7.5.3 Contractor's Representative

Contact Name:  
Address:  
Telephone:  
Facsimile:  
E-mail address:

### 7.6 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 websites as part of the published proactive disclosure reports, in accordance with [Contracting Policy Notice: 2012-2](#) of the Treasury Board Secretariat of Canada.

### 7.7 Payment

#### 7.7.1 Basis of Payment – Firm Price

1. Canada's total liability to the Contractor under the Contract, not including the Option, **must not exceed \$350,000.00**, customs duties included and Applicable Taxes extra.
2. For the Work described in paragraph 9, sub-paragraphs a. to d. of the SOW at Annex A, and for the Volume of Work described in paragraph 9, sub-paragraph e. and indicated in the Contractor's Bid dated \_\_\_\_\_ (*insert at contract award*):

- in consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price of \_\_\_\_\_ (*insert the amount at contract award*). Customs duties are included and Applicable Taxes are extra.
3. If any of the Optional Work described in paragraphs 13 and 14 of the SOW at Annex A is requested by Canada, and in consideration of the Contractor satisfactorily completing the requested Optional Work, the Contractor will be paid a firm price of \_\_\_\_\_ (*insert the amount at contract award*) for developing a training plan and a firm price of \_\_\_\_\_ (*insert the amount at contract award*) for delivering each training session (maximum 5). Customs duties are included and Applicable Taxes are extra.
  4. Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

#### 7.7.2 Milestone Payments – Not Subject to Holdback

Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract if:

- a. 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;
- b. all such documents have been verified by Canada; and
- c. all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

#### 7.7.3 Schedule of Milestones

The schedule of milestones for which payments will be made in accordance with the Contract is as follows:

Milestone No.	Deliverable	Percentage of Total Firm Price
1	Refer to SOW, paragraph 9, sub-paragraph a.	20%
2	Refer to SOW, paragraph 9, sub-paragraph b.	20%
3	Refer to SOW, paragraph 9, sub-paragraph c.	10%
4	Refer to SOW, paragraph 9, sub-paragraph d.	10%
5	Refer to SOW, paragraph 9, sub-paragraph e.	40%

#### Option

Deliverable	Percentage of Firm Price
Completion of Training Plan	50%
Completion of Training Sessions	50%

#### 7.7.4 Electronic Payment of Invoices – Contract

The Contractor accepts to be paid by Direct Deposit.

## 7.8 Invoicing Instructions

- 7.8.1 The Contractor must submit invoices in accordance with the information required in the General Conditions.
- 7.8.2 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.
- 7.8.3 Invoices must be distributed as follows:
- One (1) electronic copy must be forwarded to the Project Authority identified under the section entitled "Authorities" of the Contract.

## 7.9 Certifications and Additional Information

### 7.9.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, 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 period of the Contract.

## 7.10 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in \_\_\_\_\_ (*to be completed at contract award*).

## 7.11 Priority of Documents

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

- these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- Supplemental General Conditions: 4013 (2022-06-20) Compliance with on-site measures, standing orders, policies, and rules;
- General Conditions: 2035 (2022-12-01) General conditions - Higher Complexity - Services;
- Annex A, Statement of Work;
- Annex B, Basis of Payment;
- Annex C, Security Requirements Check List;
- the Contractor's bid dated \_\_\_\_\_, (*insert date of bid*) (*If the bid was clarified or amended, insert at the time of contract award:*"), as clarified on \_\_\_\_\_ " **or** ", as amended on \_\_\_\_\_ " *and insert date(s) of clarification(s) or amendment(s)*).

## 7.12 Foreign Nationals (Canadian Contractor OR Foreign Contractor) (*to be completed at contract award*)

SACC Manual clause A2000C (*insert date*) Foreign Nationals (Canadian Contractor)

**OR**

SACC Manual clause A2001C (*insert date*) Foreign Nationals (Foreign Contractor)

### **7.13 Insurance Requirements**

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.

### **7.14 Limitation of Liability – Information Management/Information Technology**

- a. 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 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 other document used to order services under this instrument).
  - vi. In any case, the total liability of the Contractor under paragraph (v) will not exceed the total estimated cost (as defined above) for the Contract.

- vii. 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 backup kept by Canada. Canada is responsible for maintaining an adequate backup 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, 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 paragraph (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 paragraph c.

**7.15 Joint Venture Contractor** *(to be completed or deleted, as applicable, at Contract Award)*

- 7.15.1 The Contractor confirms that the name of the joint venture is [REDACTED] and that it is comprised of the following members: *[list all the joint venture members named in the Contractor's original bid]*.
- 7.15.2 With respect to the relationship among the members of the joint venture Contractor, each member agrees, represents and warrants (as applicable) that:
  - a. [REDACTED] has been appointed as the "representative member" of the joint venture Contractor and has full authority to act as agent for each member regarding all matters relating to the Contract;
  - b. 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
  - c. all payments made by Canada to the representative member will act as a release by all the members.
- 7.15.3 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.
- 7.15.4 All the members are jointly and severally or solidarily liable for the performance of the entire Contract.
- 7.15.5 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.
- 7.15.6 The Contractor acknowledges that all security and controlled goods requirements in the Contract, if any, apply to each member of the joint venture Contractor.



#### **7.16 Safeguarding Electronic Media**

- 7.16.1 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.
- 7.16.2 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.

#### **7.17 Dispute Resolution**

- 7.17.1 The parties agree to maintain open and honest communication about the Work throughout and after the performance of the contract.
- 7.17.2 The parties agree to consult and co-operate with each other in the furtherance of the contract and promptly notify the other party or parties and attempt to resolve problems or differences that may arise.
- 7.17.3 If the parties cannot resolve a dispute through consultation and cooperation, the parties agree to consult a neutral third party offering alternative dispute resolution services to attempt to address the dispute.
- 7.17.4 Options of alternative dispute resolution services can be found on Canada's Buy and Sell website under the heading "[Dispute Resolution](#)".

#### **7.18 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.
- 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 (5) working days to deliver the action plan to the Client and the Contracting Authority, and twenty (20) 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

#### Organizational Background

1. Infrastructure Canada (INFC) works closely with all levels of government and other partners to enable investments in social, green, transit and other core public infrastructure as well as infrastructure that helps increase trade and grow the economy. INFC provides long-term predictable support to help Canadians benefit from world-class, modern public infrastructure. The Department achieves this by making investments, building partnerships, developing policies, delivering programs, and fostering knowledge about public infrastructure in Canada.

2. Since it was established in 2002, the Department has been an important funding partner, working with provinces, territories, municipalities, the private sector and non-profit organizations, along with other federal departments and agencies, to help build and revitalize infrastructure that supports modern, inclusive and diverse communities.

#### Information Management and Information Technology and Security Directorate

3. INFC's Information Management and Information Technology and Security (IM/IT-S) directorate is responsible for ensuring that all services related to the support of departmental programs, as well as activities and systems in support of corporate services, are documented, developed, delivered and managed according to Government of Canada best practices. This includes working collaboratively and providing support to our clients in their daily activities.

4. Given the Department's focus on delivering funding for thousands of infrastructure projects across the country, it is critical to have effective IM/IT systems in place to support the review, approval, tracking and reporting on federal infrastructure investments as well as to store and effectively use data assets appropriately. In addition, the Government of Canada is advancing an ambitious agenda for the modernization of Information Technology. INFC is committed to supporting this agenda by having launched the Integrated Data Exchange and Solution (IDEaS) Initiative incorporating three modernization projects:

- a. Digital Platform – a new comprehensive Grants and Contributions Management System aimed at providing a common User Experience for both INFC applicants and recipients as well as to internal users at INFC. It will also aim to reduce or completely remove all manual/offline processes that currently support our funding programs.
- b. Customer Relationship Management (CRM) - provide a modern CRM solution to enable the organization to better track interactions with external parties with the goal to permit the "Tell-Us-Once" approach.
- c. Unified Data Platform – adopt a state-of-the-art Data Platform to easily have the capabilities to ingest, and make available, data from various sources, and in any amount, to internal analysts as well as provide a new modern Analytics/Business Intelligence tooling to better be able to utilize this data for decision making.

5. Use of Cloud services and technologies is key to support the IDEaS initiative.

#### Current Technical Environment

##### *Platforms:*

- Microsoft Dynamics 365
- SharePoint
- Microsoft Power Platform
- Microsoft 365 Eco System
- Microsoft Azure Synapse
- Microsoft Power BI
- GCDocs

*Databases:*

- MS SQL
- Oracle RDBMS
- MySQL

*Programming Languages:*

- SQL
- DAX
- Python

*Public Cloud Provider:*

- Microsoft Azure

*Supporting Tools:*

- Azure DevOps
- Atlassian JIRA

**Requirement**

6. INFC is going through an adoption of Microsoft Power BI to establish enterprise and self-service analytics capabilities within the department. As part of adopting Power BI, INFC has a requirement to refactor Cognos reporting components to Power BI and to enable Center of Excellence around Power BI platform and reporting.

7. The IM/IT-S Directorate of INFC requires informatics professional services to:

- Assess the current state architecture of Power BI and ensure it is aligned with best practices and INFC requirements (data volume, licensing, access and security);
- Assess and prioritize Cognos Framework Manager models and packages (including those created by business users);
- Establish the Centre of Excellence (CoE) for Power BI platform; and
- Share best practices of development and maintenance of Power BI.

8. The following activities will be required:

- Inventory of applications and relevant technologies landscape;
- Inventory of existing Framework Manager Models and Packages;
- Review scaling and usage scenarios for capacity planning;
- Review report usage metrics to identify candidates for decommissioning;
- Review report metadata to identify candidates to consolidate;
- Identify data sources and workloads;
- Identify industry specific certification, security, compliance and availability requirements;
- Identify existing development best practices;
- Understand future state vision and goals; and
- Understand existing gaps and challenges.

**Tasks and Deliverables**

9. The contractor will be required to deliver the following:

- Produce a detailed Plan to migrate reports and dashboards from Cognos to Power BI;
- Implement Power BI as a platform in Microsoft Azure cloud environment;

- c. Produce repeatable change management processes that will ensure proper data migration between on-prem and cloud environments;
- d. Establish best practice development standards and templates to accelerate adoption; and
- e. Migrate Cognos reports and dashboards (a maximum of 30, of which 6 are considered complex) from on-prem data warehouse environment to Power BI on Azure Cloud.

**Note:** A complex report is defined as having approximately 20 report pages, 32 queries, over 50 joins, and 10 report views.

### **Schedule**

- 10. The Technical Authority will provide any clarification required by the contractor within the first week after the contract is awarded.
- 11. The Contractor will have 2 weeks after the clarification period ends to submit the Detailed Migration Plan to the technical authority for approval.
- 12. The Technical Authority will review deliverables and provide comments within 1 week after receiving the Migration Plan.

### **Option**

- 13. Develop a training plan for users that must include the following:
  - a. Power BI Overview and Advanced Tips and Tricks;
  - b. Report Development; and
  - c. Dashboards Development.
- 14. Deliver a maximum of five Power BI user and end-user training sessions for a maximum of six participants per session.

### **Location of Work**

- 15. The work will be conducted off-site except for the training sessions, which will take place at 180 Kent Street, Ottawa, ON.

### **Language Requirements**

- 16. All deliverables must be submitted in the English language. As well, most of the work will be performed in English. The proposed resources must be able to communicate orally and in writing in English without any assistance and with minimal errors.

### **Constraints**

- 17. The training sessions must be delivered between 8:00 and 16:00.

### **Method and Source of Acceptance**

- 18. All deliverables and services rendered under any contract are subject to inspection by the Technical Authority. The Technical Authority shall have the right to reject any deliverables that are not considered satisfactory or require correction before payment will be authorized.

## ANNEX B

### BASIS OF PAYMENT

**Initial Period:**

Firm Fixed Price for the Completion of All Work Identified in the Contractor's Proposal: (applicable taxes excluded)	\$
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**Option:**

Firm Fixed Price to develop training package: (applicable taxes excluded)	\$
Firm Fixed Price for each training session: (applicable taxes excluded)	\$

## ANNEX C

### SECURITY REQUIREMENTS CHECK LIST

COMMON-PS-SRCL#6



Government of Canada /  
Gouvernement du Canada

Contract Number / Numéro du contrat PS4239
Security Classification / Classification de sécurité UNCLASSIFIED

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

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

COMMON-PS-SRCL#6



Government of Canada  
Gouvernement du Canada

Contract Number / Numéro du contrat PS4239
Security Classification / Classification de sécurité UNCLASSIFIED

<b>PART A (continued) / PARTIE A (suite)</b>	
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? If Yes, indicate the level of sensitivity: Dans l'affirmative, indiquer le niveau de sensibilité :	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
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?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
Short Title(s) of material / Titre(s) abrégé(s) du matériel : Document Number / Numéro du document :	
<b>PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)</b>	
10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis	
<input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITE	<input type="checkbox"/> CONFIDENTIAL CONFIDENTIEL
<input type="checkbox"/> TOP SECRET - SIGINT TRÈS SECRET - SIGINT	<input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL
<input type="checkbox"/> SITE ACCESS ACCÈS AUX EMPLACEMENTS	<input type="checkbox"/> SECRET SECRET
	<input type="checkbox"/> NATO SECRET NATO SECRET
	<input type="checkbox"/> TOP SECRET TRÈS SECRET
	<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET
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? If Yes, will unscreened personnel be escorted? Dans l'affirmative, le personnel en question sera-t-il escorté?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
<b>PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)</b>	
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?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / 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?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / 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?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / 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?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / 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?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité  
UNCLASSIFIED



COMMON-PS-SRCL#6



Government of Canada  
Gouvernement du Canada

Contract Number / Numéro du contrat PS4239
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**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 / PROTÉGÉE			CLASSIFIED / CLASSIFIÉE			NATO				COMSEC					
	A	B	C	CONFIDENTIAL	SECRET	TOP SECRET	NATO RESTRICTED	NATO CONFIDENTIAL	NATO SECRET	COSMIC TOP SECRET	PROTECTED / PROTÉGÉE			CONFIDENTIAL	SECRET	TOP SECRET
											A	B	C			
Information / Assets / Renseignements / Biens																
Production																
IT Media / Support TI																
IT Link / Lien électronique																

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



## ATTACHMENT 1 TO PART 3

### BID SUBMISSION FORM

BID SUBMISSION FORM	
<b>Bidder's full legal name</b>	
<b>Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)</b>	Name
	Title
	Address
	Telephone #
	Fax #
	Email
<b>Bidder's Procurement Business Number (PBN)</b> [see the Standard Instructions 2003]  <b>[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.]</b>	
<b>Jurisdiction of Contract:</b> 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)	
<b>Former Public Servants</b>  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"

<b>Security Clearance Level of Bidder</b> [include both the level and the date it was granted] <b>[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.]</b>	
<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"><li>1. The Bidder considers itself and its proposed resources able to meet all the mandatory requirements described in the bid solicitation;</li><li>2. This bid is valid for the period requested in the bid solicitation;</li><li>3. All the information provided in the bid is complete, true and accurate; and</li><li>4. If the Bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation.</li></ol>	
<b>Signature of Authorized Representative of Bidder</b>	

## ATTACHMENT 2 TO PART 3

### PRICING SCHEDULE

The Bidder should complete this pricing schedule and include it in its financial bid. As a minimum, the Bidder must respond to this pricing schedule by inserting in its financial bid its quoted Firm Fixed Price (in Cdn \$) for the Work.

The price specified below, when quoted by the Bidder, includes the total estimated cost of all travel and living expenses that may need to be incurred for:

- a. work described in Part 7, Resulting Contract Clauses, of this bid solicitation, required to be performed within the National Capital Region (NCR). The NCR is defined in the National Capital Act, R.S.C. 1985, c. N-4, S.2.,
- b. travel between the successful bidder's place of business and the NCR, and
- c. the relocation of resources that will perform the work,

to satisfy the terms of any resulting contract. These expenses cannot be charged directly and separately from the professional fees to any contract that may result from the bid solicitation.

**Tasks and Deliverables:**

All-Inclusive Firm Fixed Price: (Applicable Taxes excluded)	\$
Applicable Taxes:	\$
Total Estimated Cost (Applicable Taxes included):	\$

**Option:**

All-Inclusive Firm Fixed Price for developing a Training Package:		\$
All-Inclusive Firm Fixed Price per Training Session:	\$	X 5 Sessions: \$
Applicable Taxes:	\$	
Total Estimated Cost (Applicable Taxes included):	\$	

## **ATTACHMENT 1 TO PART 4**

### **TECHNICAL EVALUATION CRITERIA**

#### **Instructions to Bidders**

1. In addition to the Bid Preparation Instructions stipulated in Part 3 of this solicitation and the Evaluation Procedures and Basis of Selection requirements described under Part 4 of this solicitation, the following information and instructions relate to the submission and evaluation of the mandatory and point-rated evaluation criteria contained in this solicitation.
2. The Bidder must fully complete the mandatory and point-rated evaluation tables below for the Bidder itself. The Bidder must also provide the requested Customer Reference Contacts with complete client information detailed in the Customer Reference Contact Information Form (Attachment 2 to Part 4).
3. It should be noted that cutting and pasting wording from the RFP and/or simply citing the experience does not constitute demonstration of the requirement. The Bidder must substantiate its response to the mandatory and point-rated criteria by providing a description including information that substantiates the experience claimed (e.g., deliverable provided, tools used, method utilized, outcome achieved, etc.).
4. Proposals will be evaluated in accordance with the mandatory and rated evaluation criteria as detailed in each section below.
5. Bidders are advised to address each requirement in sufficient depth to permit a complete requisite analysis and assessment by the evaluation team.
6. To be considered, each Customer Reference Contract provided must:
  - a. have been completed with the 5 years preceding the issuance date of this solicitation; and
  - b. include complete client information particulars listed under the Customer Reference Contact Information Form (Attachment 2 to Part 4).

#### **Corporate Evaluation Criteria**

##### **Mandatory Criteria**

The bid must meet the mandatory technical criteria specified below. The Bidder must provide the necessary documentation to support compliance with this requirement.

Bids which fail to meet the mandatory technical criteria will be declared non-responsive. Each mandatory technical criterion should be addressed separately.

##### **Point Rated Technical Criteria**

Bids which meet all the mandatory technical criteria will be evaluated and scored as specified in the tables inserted below.

Bids which fail to obtain the required minimum number of points specified will be declared non-responsive. Each point-rated technical criterion should be addressed separately.

### Corporate Mandatory Evaluation Criteria

- M1** The Bidder must provide the number of reports and dashboards they will commit to migrate from Cognos to Power BI (maximum 30) while remaining within the Client's budget of **\$350,000** for all the Work (not including the Option). This number must include the six complex migrations.
- The bid with the most migrations will receive 40 points. The remaining bids will be pro-rated against the bid with the most migrations.
- Note:** A complex report is defined as having approximately 20 report pages, 32 queries, over 50 joins, and 10 report views.
- M2** The Bidder must provide Customer Reference Contract(s) demonstrating 3 years of experience delivering Power BI expertise to external clients.
- M3** The Bidder must provide a Customer Reference Contract where it provided an executable plan to migrate Cognos data, reports and dashboards to Power BI.
- M4** The Bidder must provide a Customer Reference Contract where it provided a Data Integration Strategy for converting from Cognos to Power BI.
- M5** The Bidder must provide a letter from Microsoft that confirms it is a Certified Microsoft Partner in Data Management and Analytics.

**Corporate Rated Evaluation Criteria**

<b>R1 Corporate Experience</b>				
<b>Corporate Point-Rated Criteria</b>	<b>Maximum Points (Per Customer Reference Contract)</b>	<b>Customer Reference Contract #1</b>	<b>Customer Reference Contract #2</b>	<b>Bidder's Response</b>
<p>The Bidder should demonstrate that it has at least 3 years of experience delivering Power BI expertise to external clients.</p> <p>The Bidder will be awarded a maximum of 60 points for each Customer Reference Contract for a total maximum score of 120 points. The score will be based on criteria identified below.</p> <p><b>60 points</b> – The Bidder will receive 60 points for providing a Customer Reference Contract where the external client was the Government of Canada, or</p> <p><b>40 points</b> – The Bidder will receive 40 points for providing a Customer Reference Contract where the external client was a provincial or municipal government, or</p> <p><b>20 points</b> – The Bidder will receive 20 points for providing a Customer Reference Contract where the external client was private.</p>	<b>60</b>	/60	/60	
<b>Maximum Score</b>	<b>120</b>			
<b>Pass Mark</b>	<b>80</b>			
<b>Bidder's Score</b>				

<b>R2 Corporate Experience</b>				
<b>Corporate Point-Rated Criteria</b>	<b>Maximum Points (Per Customer Reference Contract)</b>	<b>Customer Reference Contract #1</b>	<b>Customer Reference Contract #2</b>	<b>Bidder's Response</b>
<p>The Bidder should demonstrate that it has experience developing and implementing Proofs of Concept for migrating data, reports and dashboards from Cognos to Power BI.</p> <p>The Bidder will be awarded a maximum of 60 points for each Customer Reference Contract for a total maximum score of 120 points. The score will be based on criteria identified below.</p> <p><b>60 points</b> – The Bidder will receive 60 points for providing a Customer Reference Contract where a Proof of Concept addressed the migration of an entire platform, i.e., multiple reports and dashboards, or</p> <p><b>20 points</b> – The Bidder will receive 20 points for providing a Customer Reference Contract where a Proof of Concept addressed the migration of a single report or dashboard.</p>	<b>60</b>	/60	/60	
<b>Maximum Score</b>	<b>120</b>			
<b>Pass Mark</b>	<b>80</b>			
<b>Bidder's Score</b>				

<b>R3 Corporate Experience</b>				
<b>Corporate Point-Rated Criteria</b>	<b>Maximum Points (Per Customer Reference Contract)</b>	<b>Customer Reference Contract #1</b>	<b>Customer Reference Contract #2</b>	<b>Bidder's Response</b>
<p>The Bidder should demonstrate that it has experience developing a Cognos BI reporting solution.</p> <p>The Bidder will be awarded a maximum of 60 points for each Customer Reference Contract for a total maximum score of 120 points. The score will be based on criteria identified below.</p> <p><b>60 points</b> – The Bidder will receive 60 points for providing a Customer Reference Contract where the reporting solution addressed high complexity i.e., a minimum of 6 tables and views, or</p> <p><b>20 points</b> – The Bidder will receive 20 points for providing a Customer Reference Contract where the reporting solution addressed an active report or dashboard.</p>	<b>60</b>	/60	/60	
<b>Maximum Score</b>	<b>120</b>			
<b>Pass Mark</b>	<b>80</b>			
<b>Bidder's Score</b>				



<b>R4 Corporate Experience</b>				
<b>Corporate Point-Rated Criteria</b>	<b>Maximum Points (Per Customer Reference Contract)</b>	<b>Customer Reference Contract #1</b>	<b>Customer Reference Contract #2</b>	<b>Bidder's Response</b>
The Bidder should demonstrate that it has experience providing an executable plan to migrate Cognos on-premise data, reports and dashboards to an Azure Cloud Power BI.  The Bidder will be awarded 20 points for each Customer Reference Contract for a total maximum score of 40 points.	<b>20</b>	/20	/20	
<b>Maximum Score</b>	<b>40</b>			
<b>Pass Mark</b>	<b>20</b>			
<b>Bidder's Score</b>				

<b>R5 Corporate Experience</b>				
<b>Corporate Point-Rated Criteria</b>	<b>Maximum Points (Per Customer Reference Contract)</b>	<b>Customer Reference Contract #1</b>	<b>Customer Reference Contract #2</b>	<b>Bidder's Response</b>
The Bidder should demonstrate that it has experience developing and delivering a training package on Power BI.  The Bidder will be awarded 20 points for each Customer Reference Contract for a total maximum score of 40 points.	<b>20</b>	/20	/20	
<b>Maximum Score</b>	<b>40</b>			
<b>Pass Mark</b>	<b>20</b>			
<b>Bidder's Score</b>				
<b>Maximum Score - Grand Total</b>	<b>440</b>			
<b>Pass Mark - Grand Total</b>	<b>280</b>			
<b>Bidder's Score – Grand Total</b>				

## ATTACHMENT 2 TO PART 4

### CUSTOMER REFERENCE CONTACT INFORMATION FORM

*The Bidder must have been the prime contractor, rather than a subcontractor. This means that the Bidder contracted directly with the customer of the work. If the Bidder's Contract was to perform work, which another entity had itself first contracted to perform, the Bidder will not be considered the prime contractor. For example, Z (customer) contracted with Y for services. Y, in turn, entered into a contract with X to provide all or part of these services to Z. In this example, Y is a prime contractor and X is a subcontractor.*

<b>Customer Reference Contact Information:</b>	
Name of client organization: _____	
Name of client: _____	
Client's title: _____	
Client telephone n°: _____	
Email address: _____	
<b>Contract Information:</b>	
Contract n°: _____	
Start date: _____ End date: _____	
Total contract value (including Applicable Taxes and amendments): _____	
Description of work delivered:	
By signing below, the Bidder certifies that the information provided in this Form is accurate.	
Signature of authorized representative of the Bidder:	Name: _____ Title: _____ Signature: _____ Date: _____