

Canada Innovation Corporation /
La Corporation d'innovation du Canada

REQUEST FOR PROPOSALS

(CONFIDENTIAL)

SERVICE TO THE CANADA INNOVATION CORPORATION

PROPOSALS DUE: Monday, 16-October-2023 BY 5 PM EDT

27- September -2023

1. Corporation Background

Corporate Overview

- The Canada Innovation Corporation (“CIC”) has been established with a focused, outcome-driven mandate to help Canadian businesses across all sectors and regions become more innovative and more productive and will support Canadian businesses in investing in research and development.
- Additional details regarding the mandate and operations of the CIC were released in a [Blueprint](#) on February 16, 2023. To accelerate implementation of the governance and operations of the CIC, an Interim Team made up of officials with the required subject matter expertise is now in place and has begun the work to establish operations.
- A key aspect of the operationalization of the CIC is the decision to transition the Industrial Research Assistance Program (“IRAP”) from the National Research Council Canada (“NRC”) into the CIC, anticipated to occur April 1, 2024.

2. Request for Proposal

Overview

The CIC requires a team of experience specialists to build the CIC’s SharePoint Online environment in Microsoft 365 (M365) under Microsoft’s E5 licensing model. The work will establish an enterprise Electronic Information Management (EIM) system that is user-friendly, allows CIC employees to securely store and collaborate on files and applies record-keeping functionalities through Microsoft Purview to manage information throughout its lifecycle.

Requirements and Scope of Work

The CIC aims to have a functioning IM records management solution for April 1, 2024, which will include the migration of records from NRC-IRAP. It is recognized that the delivery of certain milestones may continue past the April 1, 2024, deadline. The response to this RFP must include a workplan that clearly indicates in which project phase the milestones below will be delivered.

The successful bidder will be responsible for the delivery of the following milestones for the CIC:

Mandatory deliverables 1-April-2024

- Project plans to implement the CIC’s SharePoint Online environment, which includes:
 - IM governance (including monitoring and auditing)

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- Migration plan to migrate files from the National Research Council's (NRC) IM/IT infrastructure to the CIC's SharePoint Online environment.
- Build a full life cycle document management process.
- Configuration of SharePoint Online, including:
 - Information architecture (to be supplied by CIC)
 - Metadata schema and term store (to be supplied by CIC)
 - Permissions model
 - Retention and disposition functionalities in Microsoft Purview.
 - eDiscovery functionalities with Microsoft's E5 license.
 - Security model
 - Intuitive and robust search and navigation capabilities
- Proof of concept of the CIC's SharePoint Online environment, including Microsoft Purview.
- Development of training, communication and change management materials that support the adoption of the tool in both English and French. If unable to provide the documentation in French, the English materials must have the ability to be translated.
- Provide training to CIC staff to support the adoption of the tool in both English and French. If unable to provide in French, the materials must have the ability to be translated.
- Configuration of add-on technology with the ability to:
 - Auto-tag files with metadata
 - Migrate files to other SharePoint online structure's locations based on applied metadata.
 - Automate IM lifecycle processes (e.g, retention and disposition) based on applied metadata.

Delivery post 1-April-2024

- A future state assessment of CIC's IM infrastructure that includes improving internal/external collaboration and streamlining workflows.
- Development and implementation of a Digital Asset Management Strategy.
- Documentation of the SharePoint Online configuration

3. Schedule and Timing

Process

The deadline for response to this RFP is 5:00 pm (EDT) on Friday, 6- October -2023. Responses submitted after this time may be disqualified.

Copies of the response should be submitted electronically to Aline Francis (aline.francis@fin.gc.ca).

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Responses should be in PDF or MS Word format. Hard copies are not required.

The main section of the response describing the firm's credentials and work to be performed should be maximum of 5 pages. The pricing document should be separate. The Workplan document should be separate. Supplementary or secondary information, such as team member résumés, sample deliverables or extended descriptions of relevant past projects may be included in an appendix beyond the 5-page limit.

CIC may arrange for conference calls or meetings with some or all proponents following receipt of responses.

A firm will be selected by October 18, 2023.

Questions

Questions regarding this RFP should be submitted to the CIC IT Lead as noted in Section 6.

Responses to questions may be provided to all RFP proponents.

CIC may contact proponents with questions related to their submissions.

4. RFP Submission Requirements

Deliverables

- The Proponent shall describe its overall approach to completing the work required for this mandate. This should include experience with similar assignments with the Government of Canada and/or crown corporations.
- The response shall incorporate team member résumés and/or extended descriptions of relevant past projects.
- The Proponent shall name a client manager who will be responsible for coordinating delivery. The client manager(s) should provide a point of contact for CIC and have ultimate responsibility for the quality and timeliness of the work produced.
- The Proponent shall identify the 2 to 3 key lead resources expected to undertake this work, along with CV's (included in the appendix) of such individuals as well as a summary of their credentials, expertise, and experience.

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- The Proponent shall provide a list of other personnel who will be available or assigned to the various streams of work. Credentials and experience should be included. The proponent should describe the institutional resources and capabilities it is able to bring to this mandate.
- Confirmation of the Proponent and the proposed resources and independence and lack of conflicts.
- Confirmation of the proposed resources availability to commence work.
- The Proponent shall include a listing of similar or relevant mandates performed for other clients with details to the extent permitted.

Assumptions

The Proponent should clearly list all assumptions implicit and explicit in its proposal. The proponent may indicate how changes in the assumptions will affect the workplan and pricing.

Exceptions & Conflicts

If the Proponent objects to or cannot comply with one or more of the terms enumerated in this RFP, the proponent must clearly and explicitly state this in the proposal. CIC reserves the right to reject proposals deemed non-compliant with the terms of this RFP.

Proponents should provide general information about actual, potential or perceived conflicts, including existing relationships or current engagements with interested parties.

To the extent the Proponent believes these conflicts are not material, it should explain.

To the extent the Proponent believes these are manageable conflicts, it should explain how it proposes to manage them.

Pricing Schedule

The Proponent will include a separate section containing the proposed pricing for this mandate. The pricing shall reflect the cost to CIC for the delivery of the objectives stated in the "Requirements and Scope of Work".

The proponent shall provide details of any discounts provided or available.

Contingencies that could affect pricing shall be identified. The estimated effect of such contingencies on pricing shall be clearly laid out.

The Proponent shall include a fee schedule for optional elements or such additional work that may be requested by the CIC.

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The fee shall include a clear estimate of any additional or out-of-pocket expenses that may be recoverable from the CIC.

Project Authority

The project authority is the CIC. CIC may share any resulting work with its Board of Directors, the Department of Finance as well as any other Government of Canada officials or advisors.

Should material produced by the proponent be subject to a request under the Access to Information Act, release of third-party commercial information will be considered in the context of the protections afforded by Section 20 of the Act.

Confidentiality and Security

This assignment must remain confidential.

Any Canadian government security clearance levels of consultants and contracted subject matter experts should be indicated.

Official Languages

A French version of this RFP will be provided on request. Submissions responding to this RFP may be in English or in French.

5. Evaluation of Submissions

Criteria

Submissions will be evaluated based on the following considerations as noted in the Evaluation Criteria below.

To be considered responsive, a bid must:

- (a) Meet all the first mandatory evaluation criteria and clearly indicate location in their proposal where they meet each criterion.
- (b) Obtain the required Minimum passing mark of 70% (56 points) overall of the points available for the rated criteria specified in this solicitation which are subject to point rating
- (c) Bids not meeting any of (a) and (b) above will be given no further consideration.

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Bids that are deemed responsive will be evaluated as follows:

1. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be **70% for the technical merit** and **30% for the price**.
2. 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 **70% for the technical merit**.
3. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of **30% for the price**.
4. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
5. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.
6. Highest Mandatory scoring based on evaluated criteria below which will generate a Technical Merit (70%) and Price (30%).

Mandatory Criteria

Number	Mandatory Criteria	Compliance (Yes/No)	Reference to bidder's proposal
M1	The proposed resources must have Enhanced Reliability clearance		
M2	The proposed resources must have a minimum of five (5) years with SharePoint Online configuration experience, within the last 7 years.		
M3	The Proponent must be a Microsoft Solutions Partner.		

Number	Rated Criteria	Maximum points	Evaluation criteria	Demonstrated compliance / Cross-reference to resume
R1	The Proponent will demonstrate, lead role experience, of three (3) projects within the last 36 months, using written project descriptions, corporate experience in system design, and support to the implementation of SharePoint Online system	15 pts	The Proponent must provide the following to support their response: Project Name Project Summary Project Start and Completion Dates	

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	<p>with technology that supports the automated tagging of documents. In addition, the lead resource must demonstrate experience implementing an adoption and support model for SharePoint Online</p> <p>5 points per relevant experience to a maximum of 15 points</p>		Outcomes achieved.	
R2	<p>The proposed solution will address the individual bullet requirements and timelines indicated in Section 2.0 of the RFP.</p> <p>5 points per addressed requirements, 10 bullets in total, to a maximum of 50 points</p>	50 pts		
R3	<p>The Proponent will include a workplan that demonstrates the delivery of the mandatory milestones by April 1st, 2024, and include the delivery of those milestones that will go beyond April 1st, 2024.</p>	10 pts	The Workplan meets the mandatory milestones.	
R4	<p>The proposed Proponent will demonstrate they are a Microsoft Solutions Partner.</p>	5 pts		
Total score: 80 points (minimum score: 70% or 56 points)				

Insufficiency

Proponents may be disqualified if they:

- Do not provide an RFP response by the stipulated deadline.
- Do not include information that is deemed sufficient for the CIC's purposes as described in this document; or
- Fail to disclose relevant conflicts.

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6. CIC Project Team

IT Team Lead: Paul Cooke

Paul.cooke@fin.gc.ca

Senior IM Advisor: Kim Terrio

Kim.terrio@fin.gc.ca

Lead – Interim Team, Canada Innovation Corporation

Sebastian Labelle

Sebastian.labelle@fin.gc.ca

Annex A: Current and future state of information management solutions

1. Overview

- 1.1. This Annex outlines the key parties involved in IM across the CIC and their respective roles and responsibilities. This Annex also provides suppliers with a background into previously followed policies, direction, and systems versus, current state, challenges, and future state vision as it relates to IM solutions.

2. Primary Stakeholders

- 2.1. The Canada Innovation Corporation (CIC), the National Research Council (NRC) and Library and Archives Canada (LAC) are the primary stakeholders involved in IM at the CIC.
- 2.2. The CIC sets the direction and is the business owner of their Electronic Information Management (EIM) solution. They also conduct their own procurement and are not required to follow current Treasury Board Secretariat policies and standards.
- 2.3. The NRC is the previous business owner and policymaker of the information that is transferring to the CIC. Some of the CIC's information may remain with the NRC, which will require continuous collaboration to manage this information.
- 2.4. LAC facilitates the management of information within federal institutions by evaluating information resources, issuing records disposition authorities, and developing tools, advice, guidelines, and IM community development events that support the implementation of sound recordkeeping practices.

3. Current State of IM Solutions within the NRC

- 3.1. Currently, the NRC uses SharePoint 2016 as their approved repository to manage their electronic documents. They do not have record-keeping functionalities implemented. They also use a variety of other tools to manage electronic information, including:
 - SharePoint Online / M365 / Microsoft Dynamics
 - Shared drives/network drives
 - SAP
 - Success Factors
 - Outlook
- 3.2. User adoption of the above-mentioned solutions varies by NRC branches.

4. Current Challenges

- 4.1. The NRC has completed an extensive review of the current needs of CIC users and identified the following key challenges:
 - 4.1.1. The IM solutions are rarely intuitive nor user-friendly.

- 4.1.2. It is difficult to collaborate and share documents within an organization, with other organizations, and external to the NRC.
- 4.1.3. There is a demand for automation in IM lifecycle processes and tasks (e.g., holds managements, retention, disposition).
- 4.1.4. It is difficult to integrate, automate, and synchronize existing IM systems (e.g., enterprise systems, EIM solutions, productivity tools, third party applications).
- 4.1.5. Search and navigation capabilities need improvements to support an employee's ability to find relevant or required documents.

5. Key Capabilities for Future State

- 5.1. The following 13 key capability areas have been identified for the CIC's SharePoint Online solution:
 - Auditing and Oversight
 - Automation
 - Collaboration
 - Information Architecture
 - Lifecycle Management
 - Permissions
 - Physical Information Management
 - Search & Navigation
 - Solution Architecture
 - Specialty Content
 - System Administration
 - User Experience
 - Vendor Support
- 5.2. For a detailed description of key capabilities, including associated sub-capabilities, please refer to Annex B, Appendix 2.

6. Government of Canada Requirements

- 6.1. The Government of Canada (GC) has a "cloud-smart" adoption strategy in which cloud is the preferred choice for delivering IT services and public cloud is the preferred choice for cloud deployment. Please refer to Appendix 1, Annex B for more information on the [Cloud Adoption Strategy update](#) (2023).
- 6.2. All solution(s)/tool(s) shall have capabilities in both of Canada's official languages in accordance with the GC's [Policy on Official Languages](#) (2012). Please refer to Appendix 1, Annex B for more information.

7. Security and Privacy Requirements

- 7.1. The following security requirements (SRCL and related clauses provided by the Contract Security Program) apply and form part of the contract.
 - 7.1.1. 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 Contract Security Program (**CSP**), **Public Works and Government Services (PWGSC)** at all times during the performance of the Contract.
 - 7.1.2. The contractor/offer must, at all times during the performance of the contract, hold a valid designated organization screening (DOS), issued by the CSP, PWGSC.
 - 7.1.3. 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.
 - 7.1.4. Contractors/Sub-Contractors are required to meet the Government of Canada's Security Policy for collecting, controlling, storing, and transporting sensitive information.
 - 7.1.5. Contractors proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements up to and including Protected B/Medium/Medium profile.
- 7.2. Supplier(s) can indicate if there are any sections which would limit their ability to supply solutions or services to the CIC.
 - 7.2.1. Supplier(s) can outline the impact to their technical solution or business delivery along with their concern.
 - 7.2.2. Additionally, supplier(s) can indicate their proposed solution to the presented concern.
 - 7.2.3. Supplier(s) can indicate if there are additional terms which should be considered for inclusion.

8. Accessibility Requirements

- 8.1. Current Landscape
 - 8.1.1. To ensure policy compliance with accessibility requirements in an IM environment, all solutions and tools must comply with the requirements outlined in [Policy on Service and Digital](#) (2020) policy instruments, including:

- 8.1.1.1. The [Directive on the Management of Procurement](#) (2021), which requires the incorporation of accessibility features, where appropriate, while documenting justifications if accessibility considerations are not met, and
- 8.1.1.2. The [Standard on Web Accessibility](#) (2011), which outlines requirements for ensuring that external-facing web pages, web content and web-based services are accessible to all users, including those with disabilities. The standard requires compliance with the Web Content Accessibility Guidelines ([WCAG 2.0 AA](#)) and is planned to require conformance with [WCAG 2.1 AA](#) in the near future.

8.2. Future Considerations

- 8.2.1. The Technical Committee on Accessibility Requirements for Information and Communication Technology Products and Services is working towards the adoption in its entirety of the European harmonized standard "[Accessibility requirements for ICT \(Information and Communications Technology\) products and services](#)" (EN 301 549 V3.2.1 2021-03). The EN 301 549 outlines accessibility requirements for ICT products and services.

Annex B, Appendix 1: Policies, Standards & Directives

This following section highlights the various policies, standards and directives that need to be taken into consideration.

Topic/Name	Link	Description of Policies, Standards or Directives
Information Management		
<p>ISO 16175-1:2020 Information and documentation – Processes and functional requirements for software for managing records (2020)</p>	<p>https://www.iso.org/standards/std/74294.html</p>	<p>Provides high-level functional requirements and guidance for software applications that are intended for managing digital records.</p>
Security		
<p>Security and Privacy Obligations</p>	<p>Levels of security – Security screening for government contracts – Security requirements for contracting with the Government of Canada – Canada.ca (tpsgc-pwgsc.gc.ca)</p> <p>Contract Security Manual – Security requirements for contracting with the Government of Canada - Security screening - National security - National Security and Defence – Canada.ca (tpsgc-pwgsc.gc.ca)</p>	<p>Federal government contracts contain clauses with security requirements. These requirements specify the levels of security needed to safeguard sensitive information, assets and work sites.</p> <p>The Contract Security Manual (CSM) details the requirements that private sector organizations must follow for safeguarding government information and assets provided to, or produced by, organizations awarded a government contract with security requirements.</p>

Accessibility		
<p>EN 301 549 V3.2.1 2021-03 Accessibility requirements for ICT products and services (2021)</p>	<p>https://www.etsi.org/deliver/etsi_en/301500_301599/301549/03.02.01_60/en_301549v030201p.pdf</p>	<p>The European accessibility standard that applies to any hardware or software bought or built by a public sector body in Europe. Canada is moving towards harmonizing with this standard.</p>
<p>Guideline on Making IT Usable by All (2019)</p>	<p>https://www.tbs-sct.canada.ca/pol/doc-eng.aspx?id=32620</p>	<p>Supports the GC's direction to ensure that departments, agencies, and organizations consider accessibility in the acquisition or development of IT solutions and equipment to make IT usable by all.</p>
<p>Standard on Web Accessibility (2011, updated 2013)</p>	<p>https://www.tbs-sct.canada.ca/pol/doc-eng.aspx?id=23601</p>	<p>Ensures the uniform application of a high level of web accessibility across GC websites and web applications and requires GC websites to conform with WCAG 2.0 AA.</p>
<p>Web Content Accessibility Guidelines (WCAG) 2.0 (2008)</p>	<p>https://www.w3.org/TR/WCAG20/</p>	<p>Provides recommendations to enhance web accessibility for people with disabilities. It covers a wide range of impairments and is not technology specific.</p>
<p>Web Content Accessibility Guidelines (WCAG) 2.1 AA (2018)</p>	<p>https://www.w3.org/TR/2018/REC-WCAG21-20180605/</p>	<p>Updates the success criteria of WCAG 2.0 with new criteria for accessibility software (e.g., mobile devices, low vision, cognitive disabilities) while clarifying or addressing new technologies.</p>
Other Relevant Policies, Standards, and Directives		
<p>Policy on Official Languages (2012)</p>	<p>https://www.tbs-sct.canada.ca/pol/doc-eng.aspx?id=26160</p>	<p>Facilitates institutions' compliance with and ensures effective implementation of the Official Languages Act and its regulations.</p>
<p>Cloud Adoption Strategy (2023)</p>	<p>https://www.canada.ca/en/government/system/digital-government/digital-government-innovations/cloud-services/cloud-adoption-strategy-2023-update.html</p>	<p>In evolving to the principle of cloud smart, the GC will rationalize application portfolios and align to the most appropriate hosting model. This strategy will help departments navigate modernization decisions while also addressing challenges they are experiencing.</p>

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Annex B, Appendix 2: Key Capabilities and Sub Capabilities Required

Number	Topic	Sub-Topic	Requirement
1.	Auditing and Oversight	The governance and verification of processes and ensure IM compliance (ex. security, retention, legal holds, disposition) following corporate governance mandates.	
1.1.	Auditing and Oversight	General	Ability to govern and verify processes and ensure IM compliance with corporate governance mandates.
1.2.	Auditing and Oversight	Audit Logs	Ability to document and retain a record of events taking place within IM solutions for a customizable timeframe.
1.3.	Auditing and Oversight	Data Loss Prevention	Ability to support data loss prevention.
1.4.	Auditing and Oversight	Legal holds	Ability to hold and preserve relevant information at a specific point in time for the purpose of litigation and for other legal disclosure obligations (e.g., Access to Information and Privacy (ATIP), legal hold).
1.5.	Auditing and Oversight	Monitoring	Ability to monitor the IM compliance (e.g., security, retention, legal holds, disposition) in accordance with corporate governance mandates.
1.6.	Auditing and Oversight	Reporting	Ability to produce, customize and share dashboards and reports.
2.	Automation	The use of technology to automate and streamline business operations, document creation, lifecycle management and related functions to increase efficiency.	
2.1.	Automation	General	Ability to automate and streamline business operations, document creation, lifecycle management, and related functions using workflows, machine learning, artificial intelligence, or other relevant technologies to increase efficiency.

2.2.	Automation	Long term content preservation	Ability to automate long term content preservation to ensure usability and compatibility of content with evolving software applications.
2.3.	Automation	Metadata tagging	Ability to automate modification, tagging, updating, inheritance of metadata and applying metadata models for specific content types (e.g., security labels, document types, etc.).
2.4.	Automation	Monitoring	Ability to automate the monitoring of IM compliance (e.g., security, retention, legal holds, disposition) as per corporate governance mandates and to automate the creation of relevant reports.
2.5.	Automation	Permissions	Ability to automate assigning and maintaining permissions by roles/groups.
2.6.	Automation	Records management	Ability to automate steps of lifecycle management related activities as a background operation for designated electronic records.
2.7.	Automation	Routing	Ability to automate routing and approvals (e.g., routing of correspondence management).
2.8.	Automation	Workflows - Business	Ability to use automated workflows for the purpose of approval-based transactions, information capturing, automating, and digitalizing manual processes, correspondence management, and more complex activities.
2.9.	Automation	Workflows - Administration	Ability to use automated workflows for managing system administration.
3.	Collaboration	The act of two or more people, groups, or organizations working together to complete a task or share information via secure sharing services.	
3.1.	Collaboration	General	Ability to allow multiple people, groups, or organizations to work together to complete a task or share information via secure sharing services.
3.2.	Collaboration	Co-authoring	Ability to allow multiple users to work on content simultaneously.

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3.3.	Collaboration	External Collaboration	Ability to set up and manage collaboration securely with individuals in organizations external to the federal government.
3.4.	Collaboration	Internal Collaboration	Ability to set up and manage collaboration with individuals within a single organization/department securely.
3.5.	Collaboration	Inter-departmental Collaboration	Ability to securely set up and manage collaboration with individuals within other GC organizations.
4.	Information Architecture	The process of modelling and structuring information within one or more solutions, to enable its effective sharing, reuse, horizontal aggregation, lifecycle management, security level updates, and analysis.	
4.1.	Information Architecture	General	Ability to ensure that information is organized and managed to support user needs and the business capabilities in an effective and efficient fashion (e.g., enterprise metadata management, retention management, security classifications, permissions management, information integration, etc.).
4.2.	Information Architecture	Change Request Management	Ability of the solution(s)/tool(s) to be set up to support, house, monitor, create linkages, and make ongoing changes / modifications.
4.3.	Information Architecture	Data Encryption	Ability to implement encryption of data while at rest and of data in transit for all transmissions.
5.	Lifecycle Management	The process of overseeing and governing content from creation to disposition.	
5.1.	Lifecycle Management	General	Ability to support the full lifecycle management capabilities.
5.2.	Lifecycle Management	De-classification	Ability to support de-classification.
5.3.	Lifecycle Management	Disposition	Ability to perform disposition on content and guarantee that no copies exist (when destruction takes place) or guarantee that no copies exist within an institution (when institutional transfer takes place).

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5.4.	Lifecycle Management	Long term content preservation	Ability to preserve long term electronic content to ensure usability and compatibility of content with evolving software applications.
5.5.	Lifecycle Management	Retention	Ability to perform retention on content.
6.	Permissions	The assignment and management of access to digital content for groups / roles / individuals.	
6.1.	Permissions	General	Ability to assign and manage access to digital content for groups / roles / individuals.
6.2.	Permissions	Auditing Permissions	Ability to support and provide auditor rights for the purpose of permission auditing.
6.3.	Permissions	E-discovery	Ability to support, assign and manage a wide range of permissions to a subset of individuals for the purpose of viewing and collecting digital data for litigation and other legal disclosure obligations (e.g., ATIP, legal hold).
6.4.	Permissions	External Permissions	Ability to assign and manage permissions within the solution for groups/roles/individuals in an organization external to the federal government.
6.5.	Permissions	Information Rights Management	Ability to support information rights management (IRM). For example, persistent enforcement of IRM to prevent unauthorized use of CIC information, resources, and applications.
6.6.	Permissions	Inter-departmental Permissions	Ability to assign and manage permissions within the solution for groups / roles / individuals in other governmental organizations / departments.
6.7.	Permissions	Internal Permissions	Ability to assign and manage permissions within the solution for groups / roles / individuals within a single organization / department.

7.	Search & Navigation	The enablement of information retrieval in an organizational setting. The search functionality allows users to input specific keywords and retrieve relevant information from various data sources, while navigation helps users to explore the structure of the organization's information architecture to find the data they need.	
7.1.	Search & Navigation	General	Ability to enable information retrieval in an organizational setting.
7.2.	Search & Navigation	E-discovery	Ability to retrieve relevant results when searching and navigating through digital content for the purpose of litigation and other legal disclosure obligations (e.g., ATIP).
7.3.	Search & Navigation	Federated search	Ability to search for relevant results across multiple systems/solutions.
7.4.	Search & Navigation	Official Languages	Ability to support the user in searching and navigating in both of Canada's official languages.
7.5.	Search & Navigation	Relevance of search	<p>Ability of solution(s)/tool(s) over time to learn and understand the user's (smart search) and the information contained in the solution to provide more relevant search results (heuristic).</p> <p>Solution architecture and infrastructure need to be able to support use of artificial intelligence.</p>
7.6.	Search & Navigation	Search Result Manipulation	Ability to filter, present, and export relevant results when searching and navigating on solution(s)/tool(s).
7.7.	Search & Navigation	Specialty Content	Ability to search and navigate for speciality content (includes multimedia) and present results in an intuitive and user-friendly manner (previews, thumbnails) that is relevant to that form of content.
8.	Solution Architecture	The process of designing and structuring IM systems to define and communicate a shared technical and architectural vision and ensure the solution is fit for its intended purpose.	
8.1.	Solution Architecture	General	Ability to design and structure IM systems to define and communicate a shared technical and architectural vision and ensure the solution is fit for its intended purpose.

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8.2.	Solution Architecture	Cloud	Ability to run natively in a cloud environment (speed capabilities, scalability, types of cloud computing services offered, cloud to ground integrations).
8.3.	Solution Architecture	Cyber Security	Ability to ensure solutions have appropriate security safeguards commensurate with the confidentiality, integrity and availability of the data.
8.4.	Solution Architecture	External Interoperability	Ability to collaborate and share relevant information securely with external organizations in situations with varying frequency (single instance, short term, and long term).
8.5.	Solution Architecture	Integration of Systems – Business Solutions	Ability to have interoperability with business solutions (e.g., SAP, Peoplesoft).
8.6.	Solution Architecture	Integration of Systems – Productivity tools	Ability to have interoperability with productivity tools (e.g., Teams, M365).
8.7.	Solution Architecture	Performance and Scalability – User base	Ability to scale based on large number of groups/clients/users or number/size of documents while maintaining performance standards.
8.8.	Solution Architecture	Performance and Scalability - Volume	Ability of the solution architecture to be changed to accommodate changing volume (e.g., expansion as organizational growth takes place) while maintaining performance standards.
8.9.	Solution Architecture	Third party applications	Ability to integrate and have interoperability with third party applications (e.g., electronic signing of documents) to enhance functionality.
9.	System Administration	The maintenance, configuration, and management of solution(s)/tools(s) and related activities.	
9.1.	System Administration	General	Ability to configure, maintain, and manage solution(s) / tool(s) and related activities.
9.2.	System Administration	Administrator Permissions	Ability to assign and manage full permissions for Administrators.

9.3.	System Administration	Bulk Actions	Ability to perform bulk activities in the background (e.g., bulk importing/exporting, permissions, metadata).
9.3.1.	System Administration	Bulk Action Automation	Ability of bulk actions to be triggered by workflows.
9.4.	System Administration	Configuration	Ability to configure the solution(s)/tool(s) to meet unique client requirements.
10.	User Experience	The process of designing IM solutions with a focus on how users interact with and experiences a product, system, or service. This includes considering their perceptions of utility, ease of use, and efficiency.	
10.1.	User Experience	General	Ability to design IM solutions with a focus on how users interact with and experience a product, service, or system.
10.2.	User Experience	Accessibility	Ability of solution(s)/tool(s) to conform with WCAG 2.1 AA and/or EN 301 549 V3.2.1 2021-03.
10.3.	User Experience	Administrator Interface	Ability to have an interface that enables administrators to perform relevant activities (e.g., changes, reports, monitoring) in an easy and intuitive manner.
10.4.	User Experience	Configurable Interfaces	Ability to create configurable user interfaces on solution(s)/tool(s) for various roles/groups (e.g., users vs administrators).
10.5.	User Experience	Official Languages	Ability to have an interface that supports both of Canada's official languages.
10.6.	User Experience	Automated Translation	Ability to automate translation of text-based content to enable the user to leverage documents in the language of their choice, regardless of the language in which the document is stored.
10.7.	User Experience	User Interface	Ability to have a user-friendly interface (easy to use, intuitive, ease of navigation, visually appealing, etc.).
11.	Vendor Support	The services relating to ongoing support for hardware or software by vendors of record for their solution(s)/tool(s).	

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11.1.	Vendor Support	General	Ability to give ongoing vendor support to hardware or software procured by the GC for their solution(s)/tool(s).
11.2.	Vendor Support	Professional Services	Ability for vendors to provide professional services to assist clients in the implementation of your solution(s)/tool(s) on an ongoing basis.
11.3.	Vendor Support	Release Management	Ability for vendors to provide support and communications on updates to the solution(s)/tool(s) in advance of release on an ongoing basis.
11.4.	Vendor Support	Training	Ability for vendors to provide training (quick reference guides, demos, live training) on solution(s)/tool(s) on an ongoing basis.
11.5.	Vendor Support	Troubleshooting	Ability for vendors to provide troubleshooting support in a timely manner for the solution(s)/tool(s) on an ongoing basis in the form of self-serve, phone/chat, and in person.

Annex B, Appendix 3: Additional Certifications Precedent to Contract Award

1.0 Status and Availability of Resources

SACC Manual clause [A3005T](#) (2010-08-16)

The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications, and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

2.0 Education and Experience

SACC Manual clause [A3010T](#) (2010-08-16) Education and Experience

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

3.0 Security Requirements

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 Annex A: Part 7 – Security and Privacy Requirements.
- (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 Annex A: Part 7

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(c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets, or sensitive work sites.

2. For additional information on security requirements, Bidders should refer to the Contract Security Program of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.