

**Schedule 2 to Addendum No. 2
Amendment No. 2 to the RFP**

1. Appendix B (Evaluation Criteria), shall be deleted in its entirety and replaced with the following:

**APPENDIX B – EVALUATION CRITERIA
Document Automation Solution**

TABLE 1 - MANDATORY TECHNICAL CRITERIA		Yes / No
1	<p>The Contractor's Solution must deliver, enable, and support a working and complete <u>commercially available solution</u>, which must include any and all components that contribute to the composition of the whole or in part(s), as expressed in the RFP and business and non-functional requirements (see Schedule 1 to Appendix A). The Solution must interoperate in the CCC Environment and Volumes (see Appendix A).</p> <p>Bid Submission Requirement: The Proponent must clearly demonstrate that the proposed solution is commercially available and supported in any format such as on premises, hosted, cloud, or as a service.</p>	Yes/No
2	<p>The Proponent's proposal must include professional services resources that hold at a minimum, a valid <u>Reliability security clearance</u> with Canadian and Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC) at the time of bid closing. <u>Proponents will have until the date of the contract award to obtain the necessary security clearances.</u></p> <p>Bid Submission Requirement: For each proposed professional service resource, the resource name, CISD security file number, and expiry date must be included <u>or notify if in process of obtaining clearance as noted above.</u></p>	Yes/No

TABLE 2 - NON-PRICE RATED EVALUATION CRITERIA		Max 80 points
1.	Government of Canada, <u>Canadian Provincial or Municipal Government</u> Experience with Artificial Intelligence (AI)	XX/10
1.1	Respondents to provide a maximum of five (5) relevant examples that concisely describe the experience in the application and implementation of Artificial Intelligence	Max 10

TABLE 2 - NON-PRICE RATED EVALUATION CRITERIA		Max 80 points
	<p>(AI) technology services (includes natural language processing, the parsing and extraction of structured and unstructured data, including the analysis of, and automated data entry of, parsed and extracted data elements) within the Government of Canada (includes Departments, Agencies and Crown Corporations) <u>or Canadian Provincial and Municipal Departments, Agencies and Crown Corporations. Please note that the Provincial or Municipal government organization identified as a reference must have a minimum of one hundred (100) full-time employees.</u></p> <p>At least one example <u>must</u> be a project as a Prime Contractor in the application and implementation of AI for the Government of Canada, <u>or Canadian Provincial or Municipal government organization as noted above.</u></p> <p>Other project examples may be prior experience as a prime or sub-contractor.</p> <p>Two (2) points will be awarded per project, for a maximum of 5 projects.</p> <p>Bid submission requirement: In order to demonstrate this experience, the Proponent must provide a brief written summary of the project. Within the project summary the Proponent must provide the following information:</p> <ol style="list-style-type: none"> 1. Name of client and brief description of project, 2. Brief description of the type and scope of services provided, 3. Methodology used and results, 4. Duration of the project, including the start and end dates (month/year to month/year), telephone number and/or email address of the client reference to whom the Proponent reported, the contact information may be used to validate the information provided 	<p>points</p> <p>2 points per project</p>
2. Proposed Project Plan		XX/16
2.1	<p>Proponent must provide a draft project implementation plan consistent with all requirements described for work within the Appendix A (RFP Particulars).</p> <p>Bid submission requirement: Within the draft project plan, the Proponent to provide the following information:</p> <ol style="list-style-type: none"> 1. A project schedule with dates and times (2 points) 	Max 16 points

TABLE 2 - NON-PRICE RATED EVALUATION CRITERIA		Max 80 points
	<ol style="list-style-type: none"> 2. The methodology, including detailed information on the work to be performed (4 points) 3. A brief description of the proposed tools and resources (2 points) 4. A breakdown table of the level of effort, including the estimated days with consultant resources and CCC's resources allocations. (8 points) 	
3. Support and Maintenance Plan		XX/16
3.1	<p>The Proponent must include a description of its support and maintenance services, which must be consistent with all the requirements described for work within the Appendix A (RFP Deliverables).</p> <p>Bid submission requirement: At a minimum, the Proponent must describe its:</p> <ol style="list-style-type: none"> 1. Problem reporting and response procedures; (5 points) 2. Escalation procedures; (5 points) 3. On-site and off-site support availability; (5 point) and 4. Any enhancements to the basic requirements that the Proponent is offering. (1 point) 	Max 16 points
4. Training Plan		XX/16
4.1	<p>Description of the Proponent's training plan and system documentation consistent with all the requirements described for work within the Appendix A (RFP Particulars).</p> <p>Bid Submission Requirement: At a minimum the Proponent must describe its training plan and system documentation for:</p> <ol style="list-style-type: none"> 1. System Users (2 points) 2. System Administrators or Technical Specialists (2 points) 3. System Developers (2 points) 4. System Report Writers (2 points) 	Max 16 points
5. Ability to meet CCC timelines		XX/14
5.1	<p>It is understood that the project schedule will depend, to some degree, on the date of Contract signing. However, it is expected that a Pilot of the automation solution will be available no later than May 1, 2024. The fully operational solution itself, will be in Production no later than July 1, 2024.</p>	Max 14 points

TABLE 2 - NON-PRICE RATED EVALUATION CRITERIA		Max 80 points
	<p>Bid Submission Requirement: Please respond in detail, how you will work to address the key deployment dates described above.</p> <ol style="list-style-type: none"> 1. Meet the requirement to have a solution in Pilot mode no later than May 1, 2024 (7 points) 2. Meet the requirement to have a fully operational solution in Production environment no later than July 1, 2024 (7 points) 	
6. Team Portfolio		XX/7
6.1	<p>The Proponent must demonstrate their professional services resources experience and skills in implementing AI projects. The Proponent should recommend a minimum of three (3) project team resources that will be involved in designing, configuring and deploying the automation solution for CCC. The proposed resources should have prior experience in configuring and/or deploying the proposed technical solution.</p> <p>Description of roles:</p> <p>Project Manager:</p> <ol style="list-style-type: none"> 1. The Project Manager is responsible for the coordination, delivery and quality of all Work performed by the Proponent. 2. The Project Manager is responsible for coordinating and reporting on all the Project Management elements of the project such as Time Planning, Scheduling and Control, Estimating and Cost Planning, and Risk Management, throughout the project. 3. The Project Manager is responsible for establishing and maintaining a clear and working communications strategy throughout the project with all key project stakeholders. The Project Manager must ensure that a clear communications contact is identified and maintained for all major areas of the project, with particular attention to the CCC Project Manager, and each of the Contractor's team components. 4. The Project Manager will be the prime contact for the Contractor's team and the CCC Project Manager. <p>Technical Lead:</p>	Max 7 points

TABLE 2 - NON-PRICE RATED EVALUATION CRITERIA		Max 80 points
	<ol style="list-style-type: none"> 1. As a key member of the Contractor's team to have primary technical responsibility for the overall technical configuration and deployment activities of the proposed document automation solution. The Technical Leads works with the CCC project team to ensure a holistic integration of the CCC requirements into the overall software design and configuration. 2. Responsible to ensure that business requirements, business rules and CCC's current workflows are configured and tested in the solution. 3. Ensure that the appropriate test plans and test cases are developed, documented and successfully executed. Furthermore, works with the CCC team to ensure that testing is completed successfully and to meets CCC's acceptance criteria. <p>Business Analyst:</p> <ol style="list-style-type: none"> 1. As a key member of the Contractor's team, it is the Business Analyst's primary responsibility to ensure that all document elements, business requirements and business rules are incorporated into the solution through the use of a best practise mindset. 2. It is also the Business Analyst's role to work hand-in-hand with the Project Manager, Technical Lead and the CCC team to ensure that the proposed solution addresses CCC's expected outcome of this project. <p>Other team members:</p> <ol style="list-style-type: none"> 1. Other key members of the project team that will be needed. <p>Bid submission requirement: Proponent must provide: A list of the names of all project team resources, including each resources' Curriculum Vitae (CV) relevant projects, demonstrating;</p> <ol style="list-style-type: none"> 1. Project Manager: Minimum of ten (10) years managing similar sized AI or software implementation projects, with PMP, PRINCE2 or equivalent certification. (2 points) 2. Technical Lead: Experience in leading the technical configuration and deployment activities of the proposed document automation solution. Relevant certifications with the application must also be included. (2 points) 	

TABLE 2 - NON-PRICE RATED EVALUATION CRITERIA		Max 80 points
	3. Business Analyst: Experience in gathering and documenting business processes and requirements. Relevant certifications with the application and in Business Analysis (e.g. Lean Six Sigma, CBAP, etc.) must also be included. (2 points) 4. Other Project team members as needed: Minimum of one (1) project experience in the implementation of the Proponents proposed solution. (1 point)	
7. Support of under-represented groups		XX/1
7.1	<p>The Government of Canada has placed a priority on its efforts around equity, diversity and inclusion (EDI) and is interested in better understanding how its programs, including CCC's services are benefitting its customers and in particular those that are owned or led by members of under-represented groups. In response to this GC priority, CCC has begun to collect data on the composition of underrepresented groups within the ownership and leadership structures of the companies that CCC supports.</p> <p>Bid Submission requirement: Please explain in detail if your project team includes the composition of underrepresented groups within the ownership and leadership structures as a prime or sub-contractor.</p>	Max 1 point
TOTAL FOR RATED REQUIREMENTS – XX/80		

For the proposal to be technically acceptable, it must score a minimum of 56 points out of 80 points (70% - Meets stated requirements). A proposal that does not meet that score will be disqualified from the process.

TABLE 3 - PRICE PROPOSAL EVALUATION		XX/20 points
1	Provide pricing for professional services to configure and implement the solution (includes training). Please use the table (Pricing – Development) found in Schedule 1 of this Appendix B - Pricing Forms.	Max 12 points
2	Provide pricing for annual licensing fees. Please use the table (Pricing – Development) found in Schedule 1 of this Appendix B - Pricing Forms.	Max 3 points
2	Provide pricing for annual support and maintenance for a three-year period. Please use the table (Pricing - Maintenance) found in Schedule 1 of this Appendix B – Pricing Forms.	Max 3 points

TABLE 3 - PRICE PROPOSAL EVALUATION		XX/20 points
3	Provide hourly rates as the basis for any ad hoc additional requirements for a three-year period. Please use the table (Pricing – Hourly Rates) found in Schedule 1 of this Appendix B – Pricing Forms.	Max 2 points

The top three (3) proponents will be invited to provide a presentation following the evaluation.

TABLE 4 - PRESENTATION		MAX 20 POINTS
	<p>Demonstrations will be scored out of a total score of 20 points. The following elements will be scored during the demo:</p> <ul style="list-style-type: none"> • Seven (7) points: Ease of use of the solution and User Experience • Ten (10) points: Ability to demonstrate recognition and capture of data from CCC documents (details will be provided to the selected bidders) • Three (3) points: Ability to answer CCC's questions. 	XX/20

Schedule 1 to APPENDIX B - Forms

Forms

Government of Canada, <u>or Canadian Provincial or Municipal Government</u> Experience with Artificial Intelligence Form	
Example No.	
Name of the client:	
Title of the Project:	
Role (Prime / Sub)	
Duration:	
Start date & end date	month-year to month-year
Contact:	
Telephone:	
Email:	
Brief description of the type and scope of the services provided:	
Methodology used:	
Complexity, identify any unique and relevant issues successfully addressed:	
Outcome/Results:	

Schedule 1 to APPENDIX B - Forms

Pricing Forms

PRICING – DEVELOPMENT		Price
1	Price of professional services for solution configuration and implementation (including training).	
2	Annual end-to-end licencing	

PRICING – MAINTENANCE		Year 1	Year 2	Year 3
3	Provide pricing for annual support and maintenance for a three-year period			

PRICING – HOURLY RATES		Year 1	Year 2	Year 3
Resource 1				
Resource 2				
Resource 3				