



**RETURN BIDS TO :**  
**Canada Revenue Agency**

**Proposal to: Canada Revenue Agency**

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

**Bidder's Legal Name and Address (ensure the Bidder's complete legal name is properly set out)**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Bidder MUST identify below the name and title of the individual authorized to sign on behalf of the Bidder**

\_\_\_\_\_  
**Signature of authorized representative**

\_\_\_\_\_  
**Date (yyyy-mm-dd)**

\_\_\_\_\_  
**Name of authorized representative (print)**

\_\_\_\_\_  
**Title of authorized representative (print)**

( ) \_\_\_\_\_

**Telephone No.**

( ) \_\_\_\_\_

**Fax No.**

\_\_\_\_\_  
**E-mail address**

**REQUEST FOR PROPOSAL**

<b>Title</b>  <b>User Experience (UX), Recruitment, Testing and Training Services</b>	
<b>Solicitation No.</b>  1000420930	<b>Date (yyyy-mm-dd)</b>  2023-03-13
<b>Solicitation closes on 2023-04-21 at 2:00 P.M.</b>	<b>Time zone</b> EDT (Eastern Daylight Time)
<b>Contracting Authority</b> Name: Stephanie Riley Address: 250 Albert Street, Ottawa, Ontario E-mail address: Stephanie.Riley@cra-arc.gc.ca	
<b>Telephone No.</b> ( 343 ) 553-0646	
<b>Fax No.</b> ( NA )	
<b>Destination</b> See herein	

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## **Request for Proposal (RFP)**

**Title:** User Experience (UX), Recruitment, Testing and Training Services

### **Part 1 General Information**

#### **1.1 Introduction**

The solicitation is divided into seven parts plus appendices 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 solicitation;
- Part 3            Proposal Preparation Instructions: provides bidders with instructions on how to prepare their bid;
- Part 4            Evaluation and 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
- Part 6            Security, Financial and Other Requirements: includes specific requirements that must be addressed by bidders; and
- Appendix 1:    Mandatory Criteria
- Appendix 2:    Point Rated Criteria
- Appendix 3:    Financial Proposal
- Part 7            Model Contract: includes the clauses and conditions and any annexes that will apply to any resulting contract.
- Annex A:        STATEMENT OF WORK
- Annex B:        BASIS OF PAYMENT
- Annex C:        USER EXPERIENCE VERIFICATION ACTIVITIES CATALOGUE
- Annex D:        TASK AUTHORIZATION FORM



## 1.2 Summary

### Task Authorization Contract (TA)

This bid solicitation is being issued to satisfy the Canada Revenue Agency (CRA) requirement for the professional services of a Contractor to provide the User Centred Design Division (UCDD), Digital Design and Production directorate (DDPD) with Recruitment; Moderated and Unmoderated Usability Testing, User Experience Training, heuristic evaluations, client interviews, prototype testing, card sorting and surveys. Specifically, the objectives of the User Experience (UX) services and support are to:

- Assess the ease of use of the CRA's program and service content (primarily online content, which may include paper or web-based applications and forms) through various UX research activities;
- Identify and recommend ways to improve the participant success rates for tasks related to CRA content;
- Provide UX guidance and expertise to advance specific project objectives; and
- Provide UX training as needed for identified employees.

The scope of Work performed will be requested by the Project Authority through individual Task Authorizations, on an "as and when requested" basis during the entire contract validity period and any future option period.

Up to three "as and when requested" contracts may be awarded as a result of this process.

The anticipated period of the resulting Contract will be for two years from the Contract award date, with three additional one year option periods.

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

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

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

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



### 1.3 Glossary of Terms

TERM	DEFINITION
CRA	Canada Revenue Agency
Day/Month/Year	For purposes of technical evaluation, one (1) month shall equal a minimum of 16.67 billable days (a day equals 7.5 hours) and one (1) year equals a minimum of 200 billable days. Any additional billable days within the same year will not increase the experience gained for the purposes of evaluation.
Project	A set of activities required to produce certain defined outputs, or to accomplish specific goals or objectives, within a defined schedule and resource budget. A project exists only for the duration of time required to complete its stated objectives.
Proposal	A solicited submission by one party to supply certain goods or services. The word “proposal” is used interchangeably with “bid”
Solicitation	An act or instance of requesting proposals/bids on specific products and/or services.
Tendering Authority	Canada Revenue Agency

### 1.4 Debriefings

Bidders may request a debriefing on the results of the solicitation process. Bidders should make the request to the Contracting Authority within ten (10) business days of receipt of the results of the solicitation process. The debriefing may be in writing, by telephone or in person.

### 1.5 Office of the Procurement Ombudsman (OPO)

The Office of the Procurement Ombudsman (OPO) was established by the Government of Canada to provide an impartial, independent venue for Canadian bidders to raise complaints regarding the award of certain federal contracts under \$30,300 for goods and \$121,200 for services. If you have concerns regarding the award of a federal contract below these dollar amounts, you may contact OPO by e-mail at [boa.opo@boa-opo.gc.ca](mailto:boa.opo@boa-opo.gc.ca), by telephone at 1-866-734-5169, or by web at [www.opo-boa.gc.ca](http://www.opo-boa.gc.ca). For more information on OPO’s services or to determine if your concerns are within the Ombudsman’s mandate, please see the [Procurement Ombudsman Regulations](#) or visit the [OPO website](#).

### 1.6 Canadian International Trade Tribunal

As a general rule, a complaint regarding this procurement process must be filed with the Canadian International Trade Tribunal (the Tribunal) within 10 working days from the date on which a bidder





becomes aware, or reasonably should have become aware, of a ground of complaint. Alternatively, within that time frame, a bidder may first choose to raise its ground of complaint by way of an objection to the CRA; if the CRA denies the relief being sought, a bidder may then file a complaint with the Tribunal within 10 working days of that denial. In certain exceptional circumstances, a 30-day time frame may be applicable for filing a complaint with the Tribunal. More information can be obtained on the Tribunal's Web site ([www.citt-tcce.gc.ca](http://www.citt-tcce.gc.ca)) or by contacting the Registrar of the Tribunal at 613-990-2452. Reference: section 6 of the Canadian International Trade Tribunal Procurement Inquiry Regulations (S.O.R./93-602).

Also consult [Bid Challenge and Recourse Mechanisms](https://buyandsell.gc.ca/for-businesses/selling-to-the-government-of-canada/bid-follow-up/bid-challenge-and-recourse-mechanisms) (<https://buyandsell.gc.ca/for-businesses/selling-to-the-government-of-canada/bid-follow-up/bid-challenge-and-recourse-mechanisms>)



**Part 2 Bidder Instructions**

**2.1 Mandatory Requirements**

Wherever the words “shall”, “must” and “will” appear in this document or any related document forming a part hereof, the item being described is a mandatory requirement.

Failure to comply or demonstrate compliance with a mandatory requirement will render the bid non-responsive and the bid will receive no further consideration.

**2.2 Standard Instructions, Clauses and Conditions A000T (2012-07-16)**

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 issued by Public Works and Government Services Canada (PWGSC). The Manual is available on the PWGSC Website:

<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>.

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of this solicitation and accept the clauses and conditions of the resulting contract.

The standard instructions and conditions 2003 (2022-03-29) are incorporated by reference into and form part of the bid solicitation.

The following clauses are incorporated by reference:

SACC Reference	Clause Title	Date
A3005T	Status and Availability of Resources	2010-08-16
A3010T	Education and Experience	2010-08-16
A3015T	Certifications	2014-06-26
C3011T	Exchange Rate Fluctuation	2013-11-06

**2.2.1 Revisions to Standard Instructions 2003**

Standard Instructions - Goods or Services – Competitive Requirements 2003 (2022-03-29) are revised as follows.

Section 01 titled “Integrity provisions– bid”, is deleted in its entirety and replaced with the following:

Section 01 Integrity provisions– bid

1. The Supplier Integrity Directive (SID) dated November 3, 2021, is incorporated by reference into, and forms a binding part of the bid solicitation. The Bidder must comply with the SID, which can be found on the Canada Revenue Agency’s website at <https://www.canada.ca/en/revenue-agency/corporate/about-canada-revenue-agency-cra/procurement-cra/supplier-integrity-directive-2.html>.



2. Under the SID, charges and convictions of certain offences against a Supplier, its affiliates or first tier subcontractors, and other circumstances, will or may result in a determination by Public Works and Government Services Canada (PWGSC) that the Supplier is ineligible to enter, or is suspended from entering into a contract with Canada. The list of ineligible and suspended Suppliers is contained in PWGSC's Integrity Database. The SID describes how enquiries can be made regarding the ineligibility or suspension of Suppliers.
3. In addition to all other information required in the bid solicitation, the Bidder must provide the following:
  - a. by the time stated in the SID, all information required by the SID described under the heading "Mandatory Provision of Information"; and
  - b. with its bid, a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first tier subcontractors that, to the best of its knowledge and belief, may be similar to one of the listed offences in the SID. The list of foreign criminal charges and convictions must be submitted using an Integrity Declaration Form, which can be found at [Forms for the Integrity Regime](#).
4. Subject to subsection 5, by submitting a bid in response to this bid solicitation, the Bidder certifies that:
  - a. it has read and understands the SID (<https://www.canada.ca/en/revenue-agency/corporate/about-canada-revenue-agency-cra/procurement-cra/supplier-integrity-directive-2.html>)
  - b. it understands that certain domestic and foreign criminal charges and convictions, and other circumstances, as described in the SID, will or may result in a determination of ineligibility or suspension under the SID;
  - c. it is aware that Canada may request additional information, certifications, and validations from the Bidder or a third party for purposes of making a determination of ineligibility or suspension;
  - d. it has provided with its bid a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first tier subcontractors that, to the best of its knowledge and belief, may be similar to one of the listed offences in the SID;
  - e. none of the domestic criminal offences, and other circumstances, described in the SID that will or may result in a determination of ineligibility or suspension, apply to it, its affiliates and its proposed first tier subcontractors; and
  - f. it is not aware of a determination of ineligibility or suspension issued by PWGSC that applies to it.
5. Where a Bidder is unable to provide any of the certifications required by subsection 4, it must submit with its bid a completed Integrity Declaration Form, which can be found at [Declaration form for procurement](#).
6. Canada will declare non-responsive any bid in respect of which the information requested is incomplete or inaccurate, or in respect of which the information contained in a certification or declaration is found by Canada to be false or misleading in any respect. If Canada establishes after



award of the Contract that the Bidder provided a false or misleading certification or declaration, Canada may terminate the Contract for default. Pursuant to the SID, Canada may also determine the Bidder to be ineligible for award of a contract for providing a false or misleading certification or declaration.

Section 02 titled "Procurement Business Number", is hereby deleted in its entirety and replaced with:

Section 02 Procurement Business Number

Suppliers should obtain a Business Number (BN) before contract award. Suppliers may register for a BN online at <https://www.canada.ca/en/services/taxes/business-number.html>.

Section 03 titled "Standard instructions, clauses and conditions", "Pursuant to the Department of Public Works and Government Services Act (S.C. 1996, c.16)," is hereby deleted.

Section 05 titled "Submission of bids", paragraph 2 (d) is deleted in its entirety and replaced with the following:

(d) send its bid only to the Canada Revenue Agency Bid Receiving Unit or to the address specified in the solicitation in Section 2.3.

Section 05 titled "Submission of bids" paragraph 4, delete "60 days" and replace with "120 days".

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

Section 07 titled "Delayed bids", all references to "PWGSC" are hereby deleted and replaced with "the CRA".

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

Section 08 Transmission by Connect

- a) Bids must be submitted by using the Connect service (<https://www.canadapost-postescanada.ca/cpc/en/business/postal-services/digital-mail/connect.page>) provided by the Canada Post Corporation.
- b) To submit a bid using the Connect service, the Bidder must send as early as possible, at least six business days prior to the solicitation closing date and time, (in order to ensure a response), an email that includes the bid solicitation number to the Bid Receiving Unit requesting to open a Connect conversation. Requests to open a Connect conversation received after that time may not be answered. In the email, the Bidder must include the name and email address of all individuals who need to participate in the Connect conversation.
- c) If the Bidder sends an email requesting a Connect conversation to the specified Bid Receiving Unit in the bid solicitation, an officer of the Bid Receiving Unit will then initiate a Connect



conversation. The Connect conversation will create an email notification from the Canada Post Corporation prompting the Bidder to access and action the message within the conversation. The Bidder will then be able to transmit its bid afterward at any time prior to the solicitation closing date and time.

- d) The bid solicitation number should be identified in the Connect message field of all electronic transfers.
- e) It should be noted that the use of Connect service requires a Canadian mailing address. Should a bidder not have a Canadian mailing address, they may use 250 Albert St, Ottawa, ON K1A 1A2 in order to register for the Connect service.
- f) For bids transmitted by the Connect service, Canada will not be responsible for any failure attributable to the transmission or receipt of the bid including, but not limited to, the following:
  - i. receipt of a garbled, corrupted or incomplete bid;
  - ii. availability or condition of the Connect service;
  - iii. incompatibility between the sending and receiving equipment;
  - iv. delay in transmission or receipt of the bid;
  - v. failure of the Bidder to properly identify the bid;
  - vi. illegibility of the bid;
  - vii. security of bid data; or,
  - viii. inability to create an electronic conversation through the Connect service.
- g) The Bid Receiving Unit will send an acknowledgement of the receipt of bid document(s) via the Connect conversation. This acknowledgement will confirm only the receipt of bid document(s) and will not confirm if the attachments may be opened nor if the content is readable.
- h) Bidders must ensure that they are using the correct email address for the Bid Receiving Unit when requesting a conversation in Connect or communicating with the Bid Receiving Unit and should not rely on the accuracy of copying and pasting the email address into the Connect system.
- i) A bid transmitted by the Connect service constitutes the formal bid of the Bidder and must be submitted in accordance with section 05.

Section 12 titled "Rejection of bid", delete subsections 1(a) and 1(b) in their entirety.

Section 20 titled "Further information", paragraph 2 is hereby deleted and replaced with the following: Enquiries concerning receipt of bids may be addressed to the Contracting Authority identified in the bid solicitation.

Section 21 titled "Code of Conduct for Procurement-bid" is hereby deleted in its entirety.



### 2.3 Submission of Proposals

When responding, the proposal MUST be delivered to the Bid Receiving Unit address indicated below by the time and date indicated on Page 1.

BIDDERS ARE TO SUBMIT PROPOSALS TO:

Canada Revenue Agency  
Bid Receiving Unit  
[BRUg@cra-arc.gc.ca](mailto:BRUg@cra-arc.gc.ca)

**Bids will not be accepted if emailed directly to this email address. This email address must be used to request that CRA open a Connect conversation, as detailed in Standard Instructions 2003. Bidders must not use their own licensing agreement for Connect to initiate a Connect conversation with CRA.**

Bidders are hereby advised that the Bid Receiving Unit of CRA is available Monday to Friday inclusive, between the hours of 0830 and 1500 EST, excluding those days that the federal government observes as a holiday.

Due to the nature of this solicitation, electronic transmissions of a proposal by facsimile is not considered to be practical and therefore will not be accepted.

### 2.4 Communications - Solicitation Period SACC A0012T (2014-03-01)

All enquiries must be submitted to the Contracting Authority no later than 5 calendar days before the bid closing date. Enquiries received after that time may not be answered.

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 SACC A9070T (2014-06-26)

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

The Bidder may, at its discretion, substitute the applicable laws of a Canadian province or territory of its choice without affecting the validity of its bid, by deleting the name of the Canadian province or



territory specified and inserting the name of the Canadian province or territory of its choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidder.

## **2.6 Terms and Conditions**

By submitting a bid, the Bidder hereby certifies compliance with and acceptance of all of the articles, clauses, terms and conditions contained or referenced in this Request for Proposal (RFP) and Statement of Work (SOW). Any modifications or conditional pricing by the Bidder, including deletions or additions to the articles, clauses, terms and conditions contained or referenced in this RFP and/or SOW will render the bid non-responsive and the bid will receive no further consideration.

## **2.7 Sustainable Development**

### Paper consumption:

Provide and transmit draft reports, final reports and bids in electronic format. Should printed material be required, double sided printing in black and white format is the default unless otherwise specified by the Project Authority.

Printed material is requested on minimum recycled content of 30% and/or certified as originating from a sustainably managed forest.

Recycle unneeded printed documents (in accordance with Security Requirements).



### **Part 3 Proposal Preparation Instructions**

#### **3.1 Bid – Number of Copies CRA MODA0055T (2007-11-30)**

Canada requests that bidders provide their bid in separate sections as follows:

Section I: Technical Bid

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.

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.

Section II: Financial

The bid's financial section should be submitted as a separate electronic document from the other bid sections. Bidders must submit their financial bid in accordance with the format outlined in Appendix 3: Financial Proposal.

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

Section III: Certifications

Bidders must submit the certifications required under Part 5.

Section IV: Additional Information

#### **3.2 Bid Format and Numbering System CRA MODA0054T (2007-11-30)**

Canada requests that bidders use a numbering system corresponding to that of the bid solicitation.





## **Part 4 Evaluation and Selection**

### **4.1 General**

A committee composed of representatives of CRA will evaluate the proposals on behalf of the Agency. The services of independent consultants may be called upon to assist in the evaluation of, or in the validation of, specific aspects of the solution proposed. CRA reserves the right to engage any independent consultant, or use any Government resources, which it deems necessary to evaluate any proposal.

Proposals will be evaluated in accordance with the evaluation criteria identified in Appendices 1 and 2 and in conjunction with the Statement of Work (SOW). Bidders are encouraged to address these criteria in sufficient depth in their proposals to permit a full evaluation of their proposals. The onus is on the Bidder to demonstrate that it meets the requirements specified in the solicitation.

Bidders are advised that only listing experience without providing any supporting information to describe where and how such experience was obtained will not be considered to be demonstrated for the purpose of the evaluation. The Bidder should not assume that the evaluation team is necessarily cognizant of or knowledgeable about the experience and capabilities of the Bidder or any of the proposed resource(s); as such, any relevant experience must be demonstrated in the Bidders' written proposal.

The evaluation team will determine first if there are two or more bids with a valid PSIB certification. In that event, the evaluation process will be limited to the bids with the certification; otherwise, all bids will be evaluated. If some of the bids with a valid certification are declared non-responsive, or are withdrawn, and less than two responsive bids with a valid certification remain, then all bids received will be evaluated.

### **4.2 Steps in the Evaluation Process**

#### **Reference Checks:**

The references provided by the Bidders are subject to verification at the Canada Revenue Agency's (CRA's) discretion during the bid evaluation period (before award of a contract). Whether or not to conduct reference checks is discretionary. However, if the CRA chooses to conduct reference checks for any given rated or mandatory requirement, it will check the references for that requirement for all bidders who have not, at that point, been found non-responsive.

- i. When the reference check is performed, the CRA will conduct the reference check in writing by e-mail. CRA will send all email reference check requests to contacts supplied by all the Bidders within a 24-hour period using the email address provided in the bid. The CRA will not award any



points unless the response is received within 2 business days of the date that CRA's email was sent.

- ii. 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. The bid will be declared non-responsive if any references given by the Bidder are untrue, whether made knowingly or unknowingly.
- iii. Points will not be allocated and/or a bidder will not meet the mandatory experience requirement (as applicable) if (a) the reference customer states he or she is unable or unwilling to provide the information requested, or (b) the client contact 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.

### **Selection Process**

The selection process to determine the successful Bidder will be carried out as follows:

Notwithstanding Steps 1 and 2 below, in order to expedite the evaluation process, CRA reserves the right to conduct Step 3 - Evaluation of Financial Proposals concurrently with Steps 1 and 2. Should CRA elect to conduct Step 3 prior to the completion of Step 2, the information in the Financial Proposal will not be disclosed to the team evaluating the mandatory and rated sections until the completion of Steps 1 and 2. However, if the Contracting Authority is able to ascertain that a proposal is non-responsive by virtue of incomplete information or an error in the financial proposal, the Contracting Authority will advise the team evaluating the mandatory and rated sections that the proposal is not compliant and should no longer be considered. The concurrent evaluation of the financial proposal does not in any way construe compliance in Steps 1 and 2 despite the statement "All bids meeting the minimum thresholds in Step 2 will proceed to Step 3".

Bids will be ranked in accordance with the Selection Methodology.

#### **Step 1 – Evaluation against Mandatory Criteria**

All bids will be evaluated to determine if the mandatory requirements detailed in Appendix 1: Mandatory Criteria have been met. Only those bids meeting ALL mandatory requirements will then be evaluated in accordance with Step 2 below.



### Step 2 – Evaluation against Point-Rated Criteria

All bids meeting the criteria from Step 1 will be evaluated and scored, in accordance with the point-rated criteria detailed in Appendix 2: Point-Rated Criteria, to determine the Bidder's Total Technical Merit Score. Bids will then be evaluated in accordance with Step 3 below.

### Step 3 – Evaluation of Financial Proposals

Only technically compliant bids meeting all of the requirements detailed in Steps 1 and 2 will be considered at this point.

Prices submitted will be evaluated to determine the bid evaluation price as defined in Appendix 3: Financial Proposal. Once the bid evaluation prices are determined under Step 3, the proposals will proceed to Step 4.

Bidders must provide a price, percentage, or weight, as applicable, for each item identified in the format specified in Appendix 3: Financial Proposal. Ranges (e.g., \$10-\$13) are not acceptable.

### Step 4 – Basis of Selection

#### **BASIS OF SELECTION - HIGHEST COMBINED RATING OF TECHNICAL MERIT AND PRICE**

1. To be declared responsive, a bid must:
  - a. comply with all the requirements of the bid solicitation; and
  - b. meet all mandatory criteria.
2. Bids not meeting (a) or (b) will be declared non-responsive.
3. 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.
4. 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%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted.
8. Up to three (3) responsive bids with the highest combined rating of 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(s) is determined by a 70/30 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$50,000.

<b>Basis of Selection - Highest Combined Rating of Technical Merit (70%) and Price (30%)</b>			
	<b>Bidder 1</b>	<b>Bidder 2</b>	<b>Bidder 3</b>
<b>Overall Score for All the Point Rated Technical Criteria</b>	120/135	98/135	82/135
<b>Bid Evaluated Price</b>	C\$60,000	C\$55,000	C\$50,000
<b>Calculations</b>	<b>Technical Merit Score (70 %)</b>	<b>Pricing Score (30 %)</b>	<b>Combined Rating</b>
<b>Bidder 1</b>	$120/135 \times 70 = 62.22$	$50/60 \times 30 = 25.00$	87.22
<b>Bidder 2</b>	$98/135 \times 70 = 50.81$	$50/55 \times 30 = 27.27$	78.08
<b>Bidder 3</b>	$82/135 \times 70 = 42.52$	$50/50 \times 30 = 30.00$	72.52
<b>Overall Ranking</b>	<b>1st</b>	<b>2nd</b>	<b>3rd</b>

#### Step 5 – Conditions Precedent to Contract Award

The Bidder recommended for award of a Contract must meet the requirements provided in Part 5 “Certifications and Additional Information” and Part 6 “Security, Financial and Other Requirements” of this RFP.

#### Step 6 – Contract Entry

The Bidder(s) with the highest ranked responsive bid and meeting all the requirements listed above will be recommended for award of a contract.



**Part 5 Certifications and Additional Information**

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

The Certifications listed at 5.1 must be completed and submitted with the bid. Failure to submit the Certifications listed at 5.1 will render the bid non-responsive and the bid will receive no further consideration.

**5.1 Certifications Required To Be Submitted At Time of Bid Closing**

**5.1.1 Joint Venture Certification**

**Only complete this certification if a joint venture is being proposed**

The Bidder represents and warrants the following:

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

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

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

\_\_\_\_\_  
\_\_\_\_\_

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

\_\_\_\_\_  
\_\_\_\_\_

(e) The effective date of formation of the joint venture is: \_\_\_\_\_

(f) Each member of the joint venture has appointed and granted full authority to \_\_\_\_\_ (the "Lead Member") to act on behalf of all members as its representative for the purposes of executing documentation relating to the solicitation and any resulting contract.



(g) The joint venture is in effect as of the date of bid submission.

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

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

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

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

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

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

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

**5.1.2 Certification of requirements for the Conditional Set-aside for Indigenous Business**

This procurement may be conditionally set aside under the federal government Procurement Strategy for Indigenous Business (PSIB). If the certification below is not provided by the Bidder, the bid will be evaluated as being from a non-Indigenous business. For more information on Indigenous business requirements of the Set-aside Program for Indigenous Business, see [Eligibility for Indigenous procurement set aside](#) and [Procurement information for Indigenous business owners](#).

A bidder who submits, **under this program**, a bid or proposal in response to a solicitation must complete and submit this certification.

1.

i) I, \_\_\_\_\_ (*Name of duly authorized representative of business*) hereby certify that \_\_\_\_\_ (*Name of business*) meets, and shall continue to meet throughout the duration of the contract, the requirements for this



program as set out in "Requirements for bidders in the Set-Aside Program for Indigenous Business", which document I have read and understand.

ii) The aforementioned business agrees to ensure that any subcontractor it engages with respect to the contract shall, if required, satisfy the requirements set out in "Requirements for bidders in the Set-Aside Program for Indigenous Business."

iii) The aforementioned business agrees to provide to ISC, immediately upon request, information to substantiate a subcontractor's compliance with this program.

2. Please check the applicable box:

i) The aforementioned business is an Indigenous business which is a sole proprietorship, band, limited company, co-operative, partnership or not-for-profit organization, [  ]

OR

ii) The aforementioned business is a joint venture between 2 or more Indigenous businesses or an Indigenous business and a non-Indigenous business. [  ]

3. The aforementioned business agrees to immediately furnish to ISC, such evidence as may be requested by ISC from time to time, corroborating this certification. Such evidence shall be open to audit during normal business hours by a representative of ISC, who may make copies and take extracts from the evidence. The aforementioned business agrees to provide all facilities for audits and to furnish information requested by ISC with respect to the certification.

4. It is understood that the civil consequences of making an untrue statement in the bid documents, or of not complying with the requirements of the program or failing to produce satisfactory evidence to ISC regarding the requirements of the program, may include:

- forfeiture of the bid deposit
- retention of the holdback
- disqualification of the business from participating in future contracts under the program
- termination of the contract

In the event that the contract is terminated because of an untrue statement or non-compliance with the requirements of the program, ISC may engage another contractor to complete the performance of the contract and any additional costs incurred by ISC shall, upon the request of ISC, be borne by the aforementioned business.

5. Date \_\_\_\_\_

Signature \_\_\_\_\_

Title (duly authorized representative of business) \_\_\_\_\_

For (name of business) \_\_\_\_\_



## 5.2 Certifications Precedent to Contract Award and Associated Information

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

### 5.2.1 Integrity Provisions – Associated Information

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

### 5.2.2 Employment Equity

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

### 5.2.3 Former Public Servant CRA Mod A3025T 2014-06-26

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

Definitions:

For the purposes of this clause, "former public servant" is any former 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.

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.

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.

**5.2.4 Vendor Reporting Information**

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

For the purpose of this clause:

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

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

The Bidder is requested to provide the following:

Legal Name: \_\_\_\_\_

Operating Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

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

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



City: \_\_\_\_\_  
 Province: \_\_\_\_\_  
 Postal Code: \_\_\_\_\_  
 Telephone: \_\_\_\_\_  
 Fax: \_\_\_\_\_

Type of Business (Select only one)

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

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

Goods and Services Tax (GST) Number: \_\_\_\_\_  
 Business Number (BN): \_\_\_\_\_

If a SIN number is being provided, the information will be requested by the Contracting Authority at time of contract award, with instructions on how to securely submit.

Social Insurance Number (SIN): \_\_\_\_\_  
 N/A Reason: \_\_\_\_\_

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

Date: \_\_\_\_\_  
 Name: \_\_\_\_\_  
 Signature: \_\_\_\_\_  
 (Signature of duly authorized representative of business)  
 Title: \_\_\_\_\_



(Title of duly authorized representative of business)

**5.2.5 Certificate of Independent Bid Determination**

I, the undersigned, in submitting the accompanying bid or tender (hereinafter “bid”) to:

**Canada Revenue Agency**

(Corporate Name of Recipient of this Submission)

for: **User Experience (UX), Recruitment, Testing and Training Services - 1000420930**

(Name of Project and Solicitation Number)

in response to the call or request (hereinafter “call”) for bids made by:

**Canada Revenue Agency**

(Name of Tendering Authority)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: \_\_\_\_\_

(Corporate Legal Name of Bidder or Tenderer [hereinafter “Bidder”])

that:

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the Bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the Bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the Bidder to determine the terms of, and to sign, the bid, on behalf of the Bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word “competitor” shall include any individual or organization, other than the Bidder, whether or not affiliated with the Bidder, who:
  - (a) has been requested to submit a bid in response to this call for bids;
  - (b) could potentially submit a bid in response to this call for bids, based on their qualifications, abilities or experience;
6. The Bidder discloses that **(check one of the following, as applicable):**
  - (a) the Bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with, any competitor;
  - (b) the Bidder has entered into consultations, communications, agreements or arrangements with one or more competitors regarding this call for bids, and the Bidder discloses, in the attached document(s), complete details thereof, including the names of the competitors



and the nature of, and reasons for, such consultations, communications, agreements or arrangements;

7. In particular, without limiting the generality of paragraphs (6)(a) or (6)(b) above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
  - (a) prices;
  - (b) methods, factors or formulas used to calculate prices;
  - (c) the intention or decision to submit, or not to submit, a bid; or
  - (d) the submission of a bid which does not meet the specifications of the call for bids; except as specifically disclosed pursuant to paragraph (6)(b) above;
8. In addition, there has been no consultation, communication, agreement or arrangement with any competitor regarding the quality, quantity, specifications or delivery particulars of the products or services to which this call for bids relates, except as specifically authorized by the Tendering Authority or as specifically disclosed pursuant to paragraph (6)(b) above;
9. The terms of the accompanying bid have not been, and will not be, knowingly disclosed by the Bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening, or of the awarding of the contract, whichever comes first, unless otherwise required by law or as specifically disclosed pursuant to paragraph (6)(b) above.

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**(Printed Name and Signature of Duly Authorized Agent of Bidder)**

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**(Position Title)**

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**(Date)**



## **Part 6 Security, Financial and Other Requirements**

### **6.1 Security Requirements**

There are no security requirements associated with this requirement. Contractor personnel must be escorted at all times while on CRA premises.



## Appendices

### Appendix 1: Mandatory Criteria

1. The Bidder must provide the necessary documentation to support compliance with these requirements.
  - a. The Bidder is advised that only listing experience without providing any supporting data to describe where and how such experience was obtained will not constitute “demonstrated” for the purpose of the evaluation.
  - b. The Bidder must clearly demonstrate in the proposal how the experience was gained or knowledge was attained, and any necessary supporting documentation.
  - c. The Bidder must provide complete details as to where, when and how (through which activities/responsibilities) the stated qualifications/experience were obtained. In order to demonstrate when experience was obtained, the bidder must indicate the duration of such experience, specifying the start and end dates (month and year at a minimum).
  - d. In the case where the timelines of two or more projects or experience overlap, the duration of time common to each project/experience will not be counted more than once.
2. Bidders should provide the required client contact details as references in the Technical Proposal of their bid.
3. The references provided by the Bidders are subject to verification at Canada’s discretion during the bid evaluation period (before award of a contract) and after award of a contract. However, if Canada chooses to conduct reference checks for any given rated or mandatory requirement, the Contracting Authority will have the right to ask for additional information to validate the references for that requirement for the Bidder that will be recommended for contract award. The bid will be declared non-responsive if any references given by the Bidder are untrue, whether made knowingly or unknowingly. Failure to comply with the request of the Contracting Authority for additional information will also render the bid non-responsive.

### Evaluation Procedures

Bids will be evaluated in accordance with the process outlined in Part 4 Evaluation and Selection and all the mandatory evaluation criteria detailed below. Bids failing to demonstrate compliance to ALL mandatory requirements will be considered non-responsive and the bid will receive no further consideration.



To assist with the evaluation process, it is preferred that the Bidder complete the table included below, to indicate where in its proposal the information can be located. Note: the compliance grid, by and of itself, DOES NOT constitute demonstrated evidence.

#	Mandatory Requirement	Bid Preparation Instructions	Bidder Response (include location in bid)	Met or Not Met?
M1	The Bidder must have three (3) years experience, within the last 5 years, from date of solicitation closing, in recruiting participants for usability testing or journey mapping consultations projects from the Canadian population, using incentives, if necessary, to encourage participation.	<p>The Bidder must submit project experience to demonstrate compliance. Each project must be completed by solicitation closing date and include the following information:</p> <ul style="list-style-type: none"> <li>a) Client organization name;</li> <li>b) Contact name and email address;</li> <li>c) Project title;</li> <li>d) Description of the project;</li> <li>e) Start and end date of the project(s) (month and year).</li> </ul>		
M2	The Bidder must have a minimum of three (3) years experience, within the last five (5) years, from date of solicitation closing, in screening and recruiting potential participants for usability testing.	<p>The Bidder must submit project experience to demonstrate compliance. Each project must be completed by solicitation closing date and include the following information:</p> <ul style="list-style-type: none"> <li>a) Client organization name;</li> <li>b) Contact name and email address;</li> <li>c) Project title;</li> <li>d) Description of the project;</li> </ul>		





#	Mandatory Requirement	Bid Preparation Instructions	Bidder Response (include location in bid)	Met or Not Met?
		e) Start and end date of the project(s) (month and year).		
M3	<p>The Bidder must demonstrate the completion of four (4) recruitment projects, recruiting and providing usability testing participants within Canada, within the last five (5) years, non-overlapping dates, as of solicitation closing date.</p> <p>For each project description the Bidder must include the following information:</p> <ul style="list-style-type: none"> <li>• Administering tests using a minimum of 10 participants;</li> <li>• Screening criteria and demographics used;</li> <li>• Geographic data for participants;</li> <li>• Number of participants sourced;</li> <li>• Time required to source participants;</li> <li>• Recruitment methods –e.g., cold-calling or using existing candidate pools;</li> <li>• Type and quantity of incentive paid to the participants;</li> <li>• Project duration (month and year).</li> </ul> <p>If more than four projects are submitted, only the first four (4) projects in order of presentation will be evaluated.</p>	<p>The Bidder must submit project experience to demonstrate compliance. Each project must be completed by solicitation closing date and include the following information:</p> <ul style="list-style-type: none"> <li>a) Client organization name;</li> <li>b) Contact name and email address;</li> <li>c) Project title;</li> <li>d) Description of the project;</li> <li>e) Start and end date of the project(s) (month and year).</li> </ul>		
M4	<p><b>Geographic Capacity for Face-to-Face Sessions</b></p> <p>The Bidder must have a physical location, or be able to arrange a physical facility location in the National Capital Region for in-person moderated usability testing, capable of servicing the requirements stated in mandatory criteria M1 and M2.</p>	<p>The Bidder must demonstrate compliance with this criterion by providing the municipal address, city, province and postal code. The CRA may verify the information provided using Google Maps.</p>		



#	Mandatory Requirement	Bid Preparation Instructions	Bidder Response (include location in bid)	Met or Not Met?
M5	<p>The Bidder must demonstrate a minimum of three (3) years' experience, within the last 5 years, in conducting <b>each</b> UX verification activity listed below:</p> <ol style="list-style-type: none"> <li>1. Heuristic Evaluation (HE);</li> <li>2. Cognitive Walkthrough;</li> <li>3. Persona Research and Creation;</li> <li>4. Usage Scenario (Task) Creation;</li> <li>5. Usability Testing;</li> <li>6. Information Architecture (IA) validation; and</li> <li>7. Content Verification.</li> </ol> <p>Definitions and tasks associated with each of the UX activities listed above are described in Annex C, User Experience (UX) Verification Activities Catalogue.</p> <p>Note for accessibility: All UX activities listed above must be performed ensuring that WCAG 2.0 AA conformance is a minimum requirement for the deliverable. WCAG 2.0 guidelines can be found here: <a href="http://www.w3.org/TR/WCAG20/">http://www.w3.org/TR/WCAG20/</a></p>	<p>The Bidder must submit project experience to demonstrate compliance. Each project must be completed by solicitation closing date and include the following information:</p> <ol style="list-style-type: none"> <li>a) Client organization name;</li> <li>b) Contact name and email address;</li> <li>c) Project title;</li> <li>d) Description of the project;</li> <li>e) Start and end date of the project(s) (month and year).</li> </ol>		
M6	<p>The Bidder's proposal must include a comprehensive summary for a minimum of three (3) completed projects undertaken in the last five (5) years, as of the solicitation closing date, for the UX activities listed at M5.</p> <p>For clarity, the Bidder's proposal may include more than three (3) completed projects in order to meet the requirement to address each UX verification.</p> <p>The comprehensive summary must include the following information for each project:</p> <ul style="list-style-type: none"> <li>• Client organization name;</li> <li>• Contact name and email address;</li> </ul>			



#	Mandatory Requirement	Bid Preparation Instructions	Bidder Response (include location in bid)	Met or Not Met?
	<ul style="list-style-type: none"> <li>• Project title;</li> <li>• Start and end date of the project(s) (month and year)</li> <li>• Description and scope of the project;</li> <li>• Methodology;</li> <li>• Languages tested;</li> <li>• Name of the UX verification activity</li> <li>• User, business, and technical requirements of the project; and</li> <li>• Number of participants, if applicable.</li> </ul> <p>Note for accessibility: All UX activities listed above must be performed ensuring that WCAG 2.0 AA conformance is a minimum requirement for the deliverable. WCAG 2.0 guidelines can be found here: <a href="http://www.w3.org/TR/WCAG20/">http://www.w3.org/TR/WCAG20/</a></p>			
M7	The Bidder must have three (3) years experience in the last five (5) years, delivering Introductory User experience training to a group of ten (10) or more individuals, from solicitation closing date.	<p>The Bidder must submit project experience to demonstrate compliance. Each project must be completed by solicitation closing date and include the following information:</p> <ul style="list-style-type: none"> <li>a) Client organization name;</li> <li>b) Contact name and email address;</li> <li>c) Project title;</li> <li>d) Description of the project;</li> </ul> <p>Start and end date of the project(s) (month and year).</p>		

**Appendix 2: Point Rated Criteria**

Technical bids which meet all the mandatory technical criteria in Appendix 1: Mandatory Criteria will be evaluated and scored as specified in the table below.

Technical bids will be assessed separately against the evaluation criteria identified below. Point-rated criteria not addressed in the bid will result in a score of zero being assigned against that particular criterion.

Ref#	Point Rated Technical Criteria	Maximum Available Points	Points Rating	Cross Reference to Proposal
<p><del>For the purposes of the point rated criteria R1, R2, R3, R4, R5, detailed below, the projects submitted to meet M6 criterion will be used [M6 The Bidder's proposal must include a comprehensive summary for a minimum of three (3) completed projects undertaken in the last five (5) years, as of the solicitation closing date, for the UX activities listed at M5.]</del></p>				
R1	The Bidder will be awarded points for experience conducting UX verification activities above the years listed in M5 demonstrated through submission of completed project(s) with the start and end dates of the project(s) (month and year).	10	<b>Additional Experience</b> <b>0 points</b> – less than 3 years <b>3 points</b> – 3 years to less than 4 years <b>5 points</b> – more than 4 years to less than 5 years <b>7 points</b> – more than 5 years to less than 10 years <b>10 points</b> – 10 or more years	
R2	Projects submitted for review to meet mandatory criteria M6, includes UX verification activities undertaken in both official languages.	10	<b>Projects in both official languages</b> <b>0 points</b> – 0 - 3 projects <b>5 points</b> - 4 projects <b>10 points</b> - 5 or more projects	
R3	Projects submitted for review to meet mandatory criteria M6 should include using current UX tools and platforms (e.g. Figma, Axure, Optimal Workshop, Trymata™, UserZoomGo™ or UserFeel™).	10	<b>0 points</b> – 0 - 3 projects <b>5 points</b> – 4 projects <b>10 points</b> – 5 or more projects	
R4	Projects submitted for review includes an application of Treasury Board Secretariat (TBS) guidelines on a government of Canada project initiative. Guidelines can be found here: <a href="https://www150.com.gc.ca/government-of-canada-digital-standards">Government of Canada Digital Standards - Canada.ca</a>	10	<b>0 points</b> - 0 projects <b>4 points</b> – 1 to 2 projects <b>8 points</b> – 3 to 4 projects <b>10 points</b> – 5 or more projects	



Ref#	Point Rated Technical Criteria	Maximum Available Points	Points Rating	Cross Reference to Proposal
R5	<p>Projects submitted for review include an application of standards and accessibility component such as WCAG 2.0.</p> <p>WCAG2.0 guidelines can be found here:  <a href="http://www.w3.org/WAI/standards-guidelines/wcag/">Web Content Accessibility Guidelines (WCAG) 2.0 (w3.org)</a></p>	10	<p><b>0 points</b> - 0 projects included an accessibility component and application of standards</p> <p><b>4 points</b> – 1 to 2 projects included an accessibility component and application of standards</p> <p><b>8 points</b> – 3 to 4 projects included an accessibility component and application of standards</p> <p><b>10 points</b> – 5 projects included an accessibility component and application of standards</p>	
R6	<p>Projects submitted for review to meet mandatory criteria M5 should involve the use of mobile form factors such as tablets and/or smart phones.</p>	10	<p><b>0 points</b> - 0 projects</p> <p><b>4 points</b> – 1 to 2 projects</p> <p><b>8 points</b> – 3 to 4 projects</p> <p><b>10 points</b> – 5 projects</p>	

Summary of Point Rated Criteria Evaluation Points						
Reference Number	R1	R2	R3	R4	R5	R6
Maximum Points Available	10	10	10	10	10	10
<b>Total Overall Points</b>						60
<b>Minimum Required Overall Points</b>						42



**Appendix 3: Financial Proposal**

The Bidder must submit their financial bid in accordance with the “Financial Bid Presentation Sheet” detailed below. Applicable taxes are extra.

Bidders must submit firm all-inclusive hourly rates in Canadian funds, Applicable taxes excluded, for the provision of the services outlined in Annex A: Statement of Work. These costs include, but are not limited to internal supporting staff to assist the proposed resource(s), replacements and all other administrative costs.

The sum total of the Bidder’s proposed firm all-inclusive per hour rate for the initial contract period and all contract option period (years) will be used to calculate the total bid price to calculate the total combined ranking in Part 4, section 4.2, at step 4.

**Financial Bid Presentation Proposal**

From Contract Award to Contract Completion Date					
User Experience (UX), Recruitment, Testing and Training Services	Firm All-Inclusive Hourly Rates (CDN \$)				
	Initial Contract Period-Year 1 2023-2024	Initial Contract Period-Year 2 2024-2025	Contract Option Period 1 2025-2026	Contract Option Period 2 2026-2027	Contract Option Period 3 2027-2028
	\$	\$	\$	\$	\$

**Initial Contract Period Year 1 + Initial Contract Period Year 2 + Option Period 1 + Option Period 2 + Option Period 3: = TOTAL BID EVALUATED PRICE \$ \_\_\_\_\_**



## **Part 7 Model Contract**

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

### **7.1 Revision of Departmental Name**

Reference to the Minister of Public Works and Government Services or to Public Works and Government Services Canada contained in any term, condition or clause of the contract shall be interpreted as a reference to the Commissioner of Revenue or the Canada Revenue Agency, as the case may be, with the exception of the following clauses:

- a) Standard Clauses and Conditions; and
- b) Security Requirements.

### **7.2 Agency Restructuring**

In cases where the Contracting Authority's department or agency is being reconfigured, absorbed by another government department or agency, or disbanded entirely, the Commissioner may, by giving notice to the Contractor, designate another Contracting Authority for all or part of the Contract.

### **7.3 Requirement**

The Contractor must perform the Work in accordance with the Statement of Work (SOW) at Annex A, and the Task Authorization document, attached to and forming part of the Contract.

#### **7.3.1 Period of Contract**

The period of the Contract is from contract award to \_\_\_\_\_ inclusive. (To be completed at the time of Contract award.)

#### **7.3.2 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 one (1) year period(s) 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.

The option may only be exercised by the Contracting Authority and will be evidenced, for administrative purposes only, through a contract amendment. The Contracting Authority may exercise an option at any time before the expiry of the Contract by sending a written notice to the Contractor.

**7.3.3 Option to Purchase Additional Quantities of the Goods, Services or Both**

The Contractor grants to Canada the irrevocable option to acquire the additional quantities of the goods, services or both described at Annex A – Statement of Work of the Contract under the same terms and conditions and at the prices and/or rates stated in the Contract.

The option may only be exercised by the Contracting Authority and will be evidenced, for administrative purposes only, through a contract amendment. The Contracting Authority may exercise an option at any time before the expiry of the Contract by sending a written notice to the Contractor.

**7.4 Standard Clauses and Conditions SACC A0000C (2012-07-16)**

All clauses and conditions identified in the Contract by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual issued by Public Works and Government Services Canada (PWGSC).

The Manual is available on the PWGSC Website: <https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>

The following Clauses are incorporated by reference:

SACC Reference	Clause Title	Date
A2000C	Foreign Nationals (Canadian Contractor)	2006-06-16
A2001C	Foreign Nationals (Foreign Contractor)	2006-06-16
A3015C	Certifications	2014-06-26
A9065C	Identification Badge	2006-06-16
A9068C	Site Regulations	2010-01-11
A9113C	Handling of Personal Information	2014-11-27
A9117C	T1204 – Direct Request by Customer Department	2007-11-30
B9028C	Access to Facilities and Equipment	2007-05-25
C0209C	Basis of Payment-Firm Prices Task Authorization	2013-04-25
C0305C	Cost Submission – Limitation of Expenditure	2014-06-26
C0711C	Time Verification	2008-05-12
C2000C	Taxes-Foreign-based Contractor	2007-11-30
C2605C	Canadian Customs Duties & Sales Tax –Foreign-based Contractor	2008-05-12
C6000C	Limitation of Price	2011-05-16
G1005C	Insurance – No specific requirement	2008-05-12
H1000C	Single Payment	2008-05-12
H1008C	Monthly Payments	2008-05-12





## 7.5 General Conditions

2035 (2022-12-01) General Conditions – Higher Complexity - Services, apply to and form part of the Contract.

Section 01 titled “Interpretation” the definition of "Canada", "Crown", "His Majesty" or "the Government" is hereby amended to read: "Canada", "Crown", "His Majesty" or "the Government" means His Majesty the King in right of Canada as represented by the Commissioner of the Canada Revenue Agency (CRA) and any other person duly authorized to act on behalf of the Commissioner.

Section 02 titled “Standard clauses and conditions” is hereby amended to delete the phrase “Pursuant to the Department of Public Works and Government Services Act, S.C. 1996, c. 16,” The remainder of Section 02 remains unchanged.

Section 22 titled “Confidentiality”,

Subsection 5 is hereby amended to delete “Public Works and Government Services (PWGSC)” and insert “Canada Revenue Agency (CRA)”.

Subsection 6 is hereby amended to delete “PWGSC Industrial Security Manual and its supplements”, and insert “Security Requirements for the Protection of Sensitive Information” issued by the CRA, Security Branch.

The remainder of Section 22 remains unchanged.

Section 30 titled “Termination for convenience” subsection 2.b is hereby amended to delete “in accordance with the profit provisions found in PWGSC Supply Manual section 10.65 Calculation of profit on negotiated contracts,”.

Section 41 titled “Integrity provisions - contract” is hereby deleted in its entirety and replaced with:

The Supplier Integrity Directive (SID) incorporated by reference into the bid solicitation is incorporated into, and forms a binding part of the Contract. The Contractor must comply with the provisions of the SID, which can be found on the Canada Revenue Agency’s website at <https://www.canada.ca/en/revenue-agency/corporate/about-canada-revenue-agency-cra/procurement-cra/supplier-integrity-directive-2.html>.

Section 45 titled “Code of Conduct for Procurement - contract” is hereby deleted in its entirety.

## 7.6 Security Requirements

There are no security requirements associated with this requirement. Contractor personnel must be escorted at all times while on CRA premises.



## **7.7 Authorities**

### **7.7.1 Contracting Authority A1024C (2007-05-25)**

The Contracting Authority for the Contract is:

Name: Stephanie Riley

Telephone Number: 343-553-0646

E-mail address: [Stephanie.Riley@cra-arc.gc.ca](mailto:Stephanie.Riley@cra-arc.gc.ca)

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

### **7.7.2 Project Authority A1022C (2007-05-25)**

**To be completed at the time of Contract award.**

Name:

Address:

Telephone Number:

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.

### **7.7.3 Contractor's Representative**

**To be completed at the time of Contract award.**

Name:

Address:

Telephone Number:

E-mail Address:



## **7.8 Contractor Identification Protocol**

The Contractor must be responsible for ensuring that each of its employees, officers, directors, agents, and subcontractors (hereinafter referred to as “Contractor Representative”) complies with the following self-identification requirements:

A Contractor Representative who attends a Government of Canada meeting whether internal or external must identify themselves as being a representative of the Contractor prior to the commencement of the meeting to ensure that each meeting participant is aware of the fact that the individual is not a government employee;

During the performance of any Work at a Government of Canada site, each Contractor Representative must be clearly identified at all times as being a Contractor Representative; and

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 themselves as a non-government employee 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.

## **7.9 Travel and Living Expenses**

The CRA will not cover any travel and living expenses.

## **7.10 Delivery**

Deliverables must be received by the Project Authority at the place and time specified herein the authorized Task Authorization.

## **7.11 Work Location**

The work location will be remote at the Contractors premises. Conduct of business will be done virtually with the exception of face-to-face moderated sessions, as and when required, to be detailed in the authorized Task Authorization.



### 7.12 Ordering Process

#### Task Authorization

The Work to be performed under the Contract will be on an "as and when requested basis" using a Task Authorization (TA). The Work must be completed in accordance with the description of the Work defined in Annex A: Statement of Work and the TA.

### 7.13 Task Authorization – Order of Ranking

(Insert at Contract award) contracts were awarded as a result of the Canada Revenue Agency bid solicitation number: (Insert at Contract award). The Contractors' order of ranking is as follows:

- (Insert at Contract award) \_\_\_\_\_
- (Insert at Contract award) \_\_\_\_\_
- (Insert at Contract award) \_\_\_\_\_

### 7.14 Task Authorization - Allocation

The CRA will allocate work to each supplier under the Contract on a rotational basis derived from the ranking of each Contractor. The Project Authority will determine a list of eligible Contractors based on the following criteria:

1. Contractor(s) ranking; and
2. Contractor(s) availability.

Once a list of eligible Contractor(s) is identified, the work will be allocated on a rotational basis for each authorized Task Authorization starting from the top ranked Contractor to the lowest. The top ranked Contractor receiving the first two (2) task authorization requests after contract award. Subsequent Task Authorizations will start from the next ranked Contractor and continue down the list for each new Task Authorization. Once all Contractors have had an opportunity to accept a Task Authorization the list will start from the first ranked Contractor.

Example\*

Reference TA	Vendor	Vendor Action
TA # 1	#1 ranked Contractor	#1 ranked Contractor rejects, TA awarded to #2 ranked Contractor
TA # 2	#1 ranked Contractor	#1 ranked Contractor rejects, TA awarded to #3 ranked Contractor
TA # 3	#2 ranked Contractor	#2 ranked Contractor rejects; TA awarded to #3 ranked Contractor
TA # 4	#3 ranked Contractor	#3 ranked Contractor rejects; TA awarded to #1 ranked Contractor

\* This process will be repeated for all subsequent Task Authorization(s)

If there are no eligible Contractor(s) that meet the criteria listed above, the CRA reserves the right to award the Task Authorization to any qualified Contractor at the CRA's discretion.

**Task Authorization Process:**

The CRA will authorize the Work with the Contractor by submitting a TA, which may take the form of either:

1. The CRA Project Authority will authorize the Work with the Contractor by submitting a Task Authorization with a description of the task(s) attached in an email. The Project Authority (PA) will communicate with the Contractor via email.
2. The TA will contain the details of the activities to be performed, a description of the deliverables, and a schedule indicating completion dates for the major activities or submission dates for the deliverables as per the Statement of Work.
3. The Contractor must provide the Project Authority, within 5 business days (**exception of statutory holidays**) of its receipt, the proposed total estimated cost for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract.
4. The Task Authorization description, inclusive of any revisions, included in an authorized TA must fall within the scope of the Annex A - Statement of Work.
5. The Task Authorization, inclusive of any revisions, will be authorized under the Contract through the use of Annex E – Task Authorization Form, when it is completed and signed by the Project Authority.
6. The Contractor must not commence any Work described in the Contract until an authorized TA by the Project Authority has been received by the Contractor. The Contractor acknowledges that any work performed before a TA has been received will be done at the Contractor's own risk.

**7.15 Task Authorization Authority and Limit**

The Project Authority may authorize individual TAs inclusive of any revisions up to a limit of \$\_\_\_\_\_, Applicable Taxes extra. Any TA where the total value of which would exceed that limit or any revision to a previously authorized TA that would increase the TA total value above that limit must be authorized by the Contracting Authority before issuance to the Contractor.

**7.16 Task Authorization**

The Project Authority will authorize each task authorization based on:

- The request submitted to the Contractor;
- The Contractor's response received; and
- The agreed total estimated cost for performing the task(s) or revised task(s).



### 7.17 Minimum Work Guarantee - All the Work – Authorized Task Authorization

1. In this clause, "Maximum Contract Value" means the amount specified in the "Limitation of Expenditure" clause set out in the Contract; and
2. "Minimum Contract Value" means \$25,000 of the total initial contract value including taxes.
3. Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with paragraph 3. In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.
4. In the event that Canada does not request work in the amount of the Minimum Contract Value during the period of the Contract, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.
5. Canada will have no obligation to the Contractor under this clause if Canada terminates the Contract in whole or in part for default.

### 7.18 Basis of payment: Individual Task Authorizations

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work specified in the authorized TA, as determined in accordance with the Basis of Payment in Annex B, to the limitation of expenditure specified in the authorized TA.

Canada's liability to the Contractor under the authorized TA must not exceed the limitation of expenditure specified in the authorized TA. Custom duties are extra and Applicable Taxes are extra.

No increase in the liability of Canada or in the price of the Work specified in the authorized TA resulting from any design changes, modifications or interpretations of the Work will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been authorized, in writing, by the Contracting Authority before their incorporation into the Work.

### 7.19 Limitation of Expenditure - Cumulative Total of all Task Authorizations

1. Canada's total liability to the Contractor under the Contract for all authorized Task Authorizations (TAs) inclusive of any revisions, must not exceed the sum of \$\_\_\_\_ (amount to be inserted at contract award) . Applicable Taxes are extra.
2. No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
3. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:



- a. when it is 75 percent committed, or
  - b. four (4) months before the contract expiry date, or
  - c. as soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TA's, inclusive of any revisions, whichever comes first.
4. If the notification for inadequate contract funds, the Contractor must provide to the Contracting Authority, a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

## **7.20 Basis of Payment**

The following methods of payment will form part of the authorized task authorization (TA):

### **7.20.1 Single Payment**

Canada will pay the Contractor upon completion and delivery of the Work in accordance with 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;
- c. the Work delivered has been accepted by Canada.

### **7.20.2 Monthly Payments**

Canada will pay the Contractor on a monthly basis for work performed during the month covered by the invoice in accordance with 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;
- c. the Work performed has been accepted by Canada.

### **7.20.3 Authorized Task Authorization**

#### **Firm Price Task Authorization**

In consideration of the Contractor satisfactorily completing all of its obligations under the authorized TA, the Contractor will be paid in accordance with the basis of payment, in Annex B, as specified in the authorized TA. Customs duties are included and Goods and Services Tax or Harmonized Sales Tax is extra, if applicable.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been authorized, in writing, by the Contracting Authority before their incorporation into the Work.



## 7.21 Inspection and Acceptance

All deliverables under the Contract shall be subject to inspection and acceptance by the Project Authority at destination.

## 7.22 Invoicing Instructions

The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the General Conditions. Invoices cannot be submitted until all Work identified in the invoice is completed.

Each invoice must be supported by:

- a) a copy of time sheets to support the time claimed;
- b) a copy of the release document and any other documents as specified in the Contract; and
- d) a copy of the monthly progress report.

Invoices must be distributed as follows:

- a) The original and one (1) copy must be forwarded to the Project Authority of the Contract, identified under the section entitled "Authorities", for certification and payment.
- b) One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

## 7.23 Payment Process

At Canada's discretion the Contractor will be paid using **direct deposit** or cheque.

At its sole discretion Canada may change the method of payment at any time during the period of the Contract, including any extension thereto, to one of the other payment methods stated above. All communications regarding the specific method of payment, including changes thereto, will be in writing via email as it's not Canada's desire to formally amend the Contract if the payment method is changed.

It is the sole responsibility of the Contractor to ensure that their organization is entitled to receive payment from the Government of Canada.

### 7.23.1 Payment by Direct Deposit

The Contractor shall accept Direct Deposit for payment of the goods and/or services described herein. Payments by direct deposit will be subject to Article 16 – Payment Period and Article 17 - Interest on Overdue Accounts, set out in 2035 General Conditions (2022-12-01) forming part of the Contract.

To complete or amend a direct deposit registration, the Contractor must complete the Vendor Electronic Payment Registration form accessible at: <https://www.canada.ca/en/revenue-agency/services/forms-publications/forms/rc231.html>





It is the sole responsibility of the Contractor to ensure that the information and account number submitted to Canada via their Vendor Electronic Payment Registration form is up to date. Should the Contractor's information within the Vendor Electronic Payment Registration form not be accurate or up to date, the provisions identified herein under Article 16 – Payment Period and Article 17 - Interest on Overdue Accounts, set out in 2035 General Conditions (2022-12-01) forming part of the Contract will not apply, until the Contractor corrects the matter.

### **7.23.2 Payment by Cheque**

The Contractor shall accept Government of Canada cheques for the payment of goods and/or services described herein.

### **7.24 Certifications**

The continuous compliance with the certifications provided by the Contractor and the ongoing cooperation in providing associated information are conditions of the Contract and are subject to verification by Canada during the entire period of the contract. If the Contractor does not comply with any certification, fails to provide the associated information, or it is determined that any certification made by the Contractor is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

#### **7.24.1 Federal Contractors Program for Employment Equity - Default by the Contractor**

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

### **7.25 Joint Venture (NOTE to bidders: to be deleted at contract award if not applicable)**

If the Contract is awarded to a joint venture, all members of the joint venture will be jointly and severally or solidarily liable for the performance of the Contract.

In the case of a contractual joint venture, no dispute, claim or action for damages, whether based in contract, or in tort, or any other theory of law, howsoever arising from the Request for Proposal, Contract, or any other related or subsequently issued documents including without limitation Task Authorizations, Contract Amendments, may be commenced, or brought against the CRA, including without limitation any of its officers, employees or agents unless each member of the joint venture is a party to such dispute, claim, or action (as the case may be).



The Contractor shall obtain the prior written approval of the Contracting Authority to any change in the membership of a contractual joint venture after Contract Award. Any change in the membership of a contractual joint venture after Contract Award without the prior written approval of the Contracting Authority shall be deemed to be default under the Contract.

The joint venture represents and warrants that it has appointed and granted full authority to [\(name to be inserted at Contract Award\)](#), the "Lead Member", to act on behalf of all members as its representative for the purposes of executing documentation relating to the Contract, including but not limited to Contract Amendments and Task Authorizations.

In the event of a contractual joint venture, all payments due and owing to the joint venture shall be made by the Canada Revenue Agency to the Lead Member of the joint venture. Any such payment to the Lead Member of the joint venture shall be deemed to be payment to the joint venture and shall act as a release from all the members of the joint venture.

By giving notice to the Lead Member the Canada Revenue Agency will be deemed to have given notice to all the members of the joint venture.

#### **7.26 Proactive Disclosure of Contracts with Former Public Servants CRA Mod A3025C 2013-03-21**

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.

#### **7.27 Applicable Laws SACC A9070C (2014-06-26)**

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

#### **7.28 Priority of Documents SACC A9140C (2007-05-25)**

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.

1. the Articles of Agreement;
2. the general conditions (2035 (2022-12-01) General Conditions - Higher Complexity – Services);
3. Annex A: Statement of Work;
4. Annex B: Basis of Payment;
5. Annex C: User Experience Verification Activities Catalogue;



6. Annex D; Task Authorization (including all annexes, if applicable); and
7. The Contractor's proposal dated *(insert date of bid)*, as amended on *(insert date(s) of amendment(s), if applicable)*.

## **7.29 Training and Familiarization of Contractor Personnel**

### **7.29.1 Training of Contractor Personnel**

Any training required by a new or replacement resource will be the responsibility of the Contractor, including training the resource for newly implemented software. The Contractor will assume all associated costs, including training pertaining to familiarization during the start-up of the Contract and Contract period for staff replacements. Training of the resource during the start-up period must take place without a reduction in service level. Time spent on such training will not be billed to, nor paid by, CRA.

### **7.29.2 Familiarization Period**

Prior to the completion of the Contract, it may be necessary for another resource to undertake a period of familiarization and training before the completion date. The Contractor will be required to familiarize the incoming resource according to the process described above or through the use of another approach negotiated with and acceptable to CRA.

## **7.30 Alternative Dispute Resolution**

NEGOTIATION FOLLOWED BY MANDATORY MEDIATION, THEN, IF NECESSARY BY ARBITRATION OR LITIGATION

The parties agree to meet, negotiate in good faith, and attempt to resolve, amicably, any dispute arising out of or related to the contract or any breach thereof.

If the parties are unable to resolve the dispute through negotiations within 10 working days, the parties agree to attempt to resolve the dispute through mediation by submitting the dispute to a sole mediator selected jointly by the parties. All costs shall be shared equally between the disputing parties.

If a dispute cannot be settled with a 15 calendar day period after the mediator has been appointed, or if the parties are unable to select a mediator within 15 calendar days of the date of provision of notice by one party to the other of the intention to proceed to mediation, or such longer period as agreed to by the parties, the parties shall have the right to resort to any remedies permitted by law, including but not limited to arbitration or litigation.

All defences based on the passage of time shall be tolled pending the termination of the mediation.



### **7.30.1 Office of the Procurement Ombudsman (OPO)**

The Parties agree to make every reasonable effort, in good faith, to settle amicably all disputes or claims relating to the Contract, through negotiations between the Parties' representatives authorized to settle. If the Parties do not reach a settlement within 25 working days after the dispute was initially raised to the other party in writing, either Party may contact the Office of the Procurement Ombudsman (OPO) to request dispute resolution/mediation services. OPO may be contacted by e-mail at [boa.opo@boa-opo.gc.ca](mailto:boa.opo@boa-opo.gc.ca), by telephone at 1-866-734-5169, or by web at [www.opo-boa.gc.ca](http://www.opo-boa.gc.ca). For more information on OPO's services, please see the [Procurement Ombudsman Regulations](#) or visit the [OPO website](#).

### **7.30.2 Contract Administration**

The Office of the Procurement Ombudsman (OPO) was established by the Government of Canada to provide an impartial, independent venue for Canadian bidders to raise complaints regarding the administration of certain federal contracts, regardless of dollar value. If you have concerns regarding the administration of a federal contract, you may contact OPO by e-mail at [boa.opo@boa-opo.gc.ca](mailto:boa.opo@boa-opo.gc.ca), by telephone at 1-866-734-5169, or by web at [www.opo-boa.gc.ca](http://www.opo-boa.gc.ca). For more information on OPO's services, please see the [Procurement Ombudsman Regulations](#) or visit the [OPO website](#).

### **7.31 Indigenous Business Certification**

1. The Contractor warrants that its certification of compliance is accurate and complete and in accordance with the [Eligibility for Indigenous procurement set aside](#) requirements.
2. The Contractor must keep proper records and documentation relating to the accuracy of the certification provided to Canada. The Contractor must obtain the written consent of the Contracting Authority before disposing of any such records or documentation before the expiration of six years after final payment under the Contract, or until settlement of all outstanding claims and disputes, under the Contract, whichever is later. All such records and documentation must at all times during the retention period be open to audit by the representatives of Canada, who may make copies and take extracts. The Contractor must provide all reasonably required facilities for any audits.
3. Nothing in this clause must be interpreted as limiting the rights and remedies which Canada may otherwise have pursuant to the Contract.

### **7.32 Notification of Cyber Security Events**

1. The Contractor shall provide written notice immediately upon discovery of a cyber security incident, breach, compromise, attack or cyber threat including without limitation: any activities that result in an adverse effect such as damage, disruption, unauthorized access to the Contractor's information technology system (the "IT System"), network, infrastructure, or data; malicious disruption or denial of service, (the "Cyber Incident").



The written notice shall be provided to the following:

- (a) the Contracting Authority;
  - (b) the CRA Cyber Security Operations Centre (CSOC) at [cyberincident@cra-arc.gc.ca](mailto:cyberincident@cra-arc.gc.ca); and
  - (c) the Canadian Centre for Cyber Security (CCCS) at [cyberIncident@cyber.gc.ca](mailto:cyberIncident@cyber.gc.ca).
2. The written notice shall include the following information about the Cyber Incident as soon as the information becomes available to the Contractor:
- (a) the date and time of the Cyber Incident;
  - (b) the nature of the Cyber Incident;
  - (c) identification of the compromised elements of IT Systems, network, data and infrastructure;
  - (d) a statement as to the success of the Cyber Incident;
  - (e) the extent of known or probable compromise to CRA information involved in the Cyber Incident;
  - (f) the actions the Contractor is taking or will take to contain the Cyber Incident and limit further impact caused by the Cyber Incident including timeframes for implementing such actions;
  - (g) a description of any information which was or may have been accessed or compromised as such information may impact or will impact the CRA; and
  - (h) any further or other information as may be reasonably requested by the CRA to assist the CRA in ensuring the security of its IT Systems, network, infrastructure, and data.
3. The Contractor must provide the CRA with ongoing updates on the status of the Cyber Incident as such may impact CRA including without limitation its IT Systems, network, infrastructure or data until such time as the vulnerabilities have been remedied and must provide such further and other information regarding the Cyber Incident(s) as may be reasonably requested by the CRA.
4. The information provided by the Contractor to the CRA under this section must be treated as confidential information by the CRA and will be disclosed only to those CRA employees and contractors as may be reasonably necessary to ensure the protection of the CRA's IT Systems, network, infrastructure, or data, and to the Canadian Centre for Cyber Security.
5. Failure to provide notice to the CRA under this section may, in the CRA's sole discretion, result in termination of this Agreement in accordance with General Conditions "Default by the Contractor".



## **Annexes**

The following Annexes apply to and form part of the Contract:

Annex A: Statement of Work

Annex B: Basis of Payment

Annex C: User Experience (UX) Verification Activities Catalogue

Annex D: Task Authorization Form



## Annex A: Statement of Work

### 1.0 TITLE

Recruitment of participants and Usability Testing, Introductory UX Training and other User Experience (UX) needs.

### 2.0 ORGANIZATION

The Canada Revenue Agency (“CRA”, “Agency”) User Centred Design Division (UCDD), Digital Design and Production directorate (DDPD).

### 3.0 BACKGROUND

Driven by the Treasury Board Secretariat (TBS) [Policy on Service and Digital](#), the CRA sets out the service principles, goals and service outcomes for service delivery. A key component of this is the need to regularly re-examine the CRA’s approach to how services are designed and delivered with the goal of enhancing the external client’s experience. At the same time there is a requirement to ensure the efficiency and effectiveness of the delivery channel, creating service excellence through positive organizational outcomes and realizing greater efficiencies in service delivery. There is recognition that client behavioural and experiential data can inform interaction and content design of all types.

To enable efficiencies and services delivery, the CRA has an in-house User Experience (UX) and analytics capability. It includes a user centred design process to research the interactions of the external clients to the Agency over time and across channels (personas, journey mapping usability testing, prototyping, monitoring, etc.).

DDPD currently conducts consultations and user experience activities and deliverables, including usability testing (both moderated and unmoderated), heuristic evaluations, client interviews, prototype testing, card sorting and surveys. The Contractor will perform the same activities in order to provide the CRA with additional overflow capacity. Alternatively, the Contractor will be required to recruit participants using the CRA’s program client databases, general public population and other sources as required, and the CRA UX specialists will perform the usability testing.

### 4.0 OBJECTIVES

#### Overarching objective

Client engagement methods, such as moderated and unmoderated usability testing, persona creation, heuristic evaluations, journey mapping and other UX deliverables, seek to gather evidence on the effectiveness, efficiency and satisfaction of the user experience. This is accomplished by collecting direct, in-person feedback from Canadians on CRA programs and services. This data is used to assess the usability, task success, findability, and ease of use of programs and services and identify pain points. The CRA programs and services are then revised



based on findings and re-tested as needed, ensuring that the improvements meet agreed-upon goals, and that the product aligns with current and emerging client needs and expectations.

#### Specific objective

To obtain professional services of a Contractor to provide expert user experience services and support to the CRA via the User Centred Design Division within the Digital Design and Production Directorate. Specifically, the objectives of the UX services and support are to:

- Assess the ease of use of the CRA's program and service content (primarily online content, which may include paper or web-based applications and forms) through various UX research activities;
- Identify and recommend ways to improve the participant success rates for tasks related to CRA content as defined above;
- Provide UX guidance and expertise to advance specific project objectives; and
- Provide UX training as needed for identified employees.

## **5.0 REQUIREMENTS**

### **5.1 SCOPE OF WORK**

The Contractor must provide the services and activities in accordance with the statement of work in order to meet the key requirements of the contract. The work will focus on, but will not be exclusive to, the following areas: Recruitment, Moderated and Unmoderated Usability Testing and User Experience Training.

### **5.2 DEMOGRAPHICS**

Specific demographic types of participants will occasionally be requested for this requirement, (e.g., medical professionals, tax professionals, business owners, persons with children, persons with disabilities, indigenous persons, persons from specific age groups, indigenous populations, language profiles or geographic locations).

## **6.0 TASKS AND DELIVERABLES**

### **6.1 TASKS**

The Contractor must perform during the Contract period the following tasks for each core areas:

#### **6.1.1 RECRUITMENT:**

The Contractor will provide usability testing with the Canadian population using online usability testing platforms such as Trymata™, UserZoomGo™ or UserFeel™. Other web-based platforms such as UserTesting.com™ may be used if approved by the CRA.

In support of this work, the Contractor will provide compensation per participant as per standard industry practice. The compensation rate per participant and quantity of participants will be discussed and approved by the CRA prior to starting the recruitment. It is understood that





compensation rates for specialized professions (e.g., medical practitioners, lawyers, accountants, etc.) may be higher than general population rates, and administrative fee to account for the work involved in recruitment may be added. Alternatively, the Contractor will make payments to the online usability testing platforms. The Contractor must include a distinct and separate entry on the invoices to the CRA for the substantiated cost of the recruiting.

In-person consultations or testing may take place in regional or remote locations outside Ontario, Quebec, and/or within the Ottawa-Gatineau area. Remote testing will be the primary option using the online usability testing platforms. The details related to the usability testing must be approved by the CRA in advance (e.g., demographics, geographic region, number, and type of participants, moderated or unmoderated, etc.).

**Tasks:**

- Attend and participate in kick-off meeting within one week from contract award.
- Discuss work plan, schedules and recruitment specifications and demographics with the CRA Project Authority.
- Identify potential participants using online usability testing platforms for general Canadian public population, or using their own contact list based on criteria provided by the Project Authority (only in cases where client lists are not provided by the Project Authority).
- Develop a recruitment script and screening questions (if not provided by the CRA Project Authority).
- Conduct cold-calling, email, surveys or other means necessary to recruit the appropriate participants for research, moderated and unmoderated usability testing, other UX deliverables and consultations.
- Prepare a call list of potential participants and read through the recruitment script with the participants.
  - Screen participants to validate meeting required selection criteria (e.g., age, sex, internet usage, geographic region, professional specialization, etc.)
- Schedule participants, manage cancellations with recruited participant(s) replacement(s).
- Provide completed schedule to the CRA Project Authority, including participant names and contact information, time, date and location of consultation.
- Contact each participant to confirm participation at a minimum 24 hours in advance of the scheduled date and time.
- Provide and manage compensation incentive for participants as required.

**6.1.2 MODERATED or UNMODERATED USABILITY TESTING:**

The Contractor will participate with the CRA in task workshops to formulate the key tasks for the participants to perform in the usability testing. Based on the authorized task authorization project, either the CRA or the Contractor will create interactive prototypes to use during user testing sessions in order to document the participants' attempts to complete the CRA related tasks.

**Tasks:**

- Discuss work plan, schedules, testing specifications and demographics with the Project Authority.
- Participate in half-day workshops with internal CRA subject matter expert employees at a specified CRA site in the NCR to formulate 5 (or more) tasks that can be reasonably completed in a 30-minute usability testing session.
- Set up the tasks and simulate the tests in the testing platform.
- Develop interactive prototypes for usability testing (if required; baseline usability tests will be performed on existing content).
- Provide iterative moderated or unmoderated usability testing with the results recorded in PowerPoint templates provided by the CRA, capturing all required data points and key performance indicators. Upon mutual agreement the templates can be modified to capture additional and/or enhanced data. Data points include:
  - Task success
  - Findability success
  - Time on task
  - Ease of use
  - System Usability Scale (SUS)
  - SUS participant questionnaire results
- Conduct usability tests to include baseline testing of the existing content and prototyping improvements based on evidence.
- Conduct validation testing to ensure that the improvements made meet or exceed Key Performance Indicators (KPIs).
- Analyze the results of the testing and provide recommendations for improvements as needed.
- Use Trymata, UserZoomGo, UserFeel or other cloud-based testing platforms specified by the Project Authority.
- Present the results of the testing, analysis of the issues uncovered and the recommendations for resolving the issues in a scheduled meeting.

**6.1.3 USER EXPERIENCE TRAINING**

The Contractor must prepare training content and facilitate virtual Introductory User Experience (UX) training sessions for up to 30 CRA DDPD employees per session who are not familiar with UX or the User Centred Design process. User experience training should include, but is not limited to

**Tasks:**

- Present up to two (2) User Experience training sessions per fiscal year to CRA DDPD employees in a virtual format (e.g., MS Teams).
- Works with the Project Authority to document how the CRA conducts UX and employs the user centred design process and their Usability Performance Dashboard.
- Present draft training material to the Project Authority for review prior to training sessions.



- Prepare training material, activity lessons and tests/quizzes that can be taken asynchronously.
- Training session content must cover the following topics:
  - Performing UX Research and associated deliverables
  - Creating testable tasks (Task workshops)
  - Moderated and unmoderated usability tests
  - Recording and analyzing results
  - Gaining buy-in for approvals and launch
  - Monitoring and making adjustments after launch
- Create a mechanism to ensure that the tests are graded, attendance and participants successful completion are recorded.

## 6.2 DELIVERABLES and TIMEFRAME

### 6.2.1 DELIVERABLES

The Contractor must complete and present all deliverables during the Contract period to the Project Authority for approval and acceptance in accordance and agreement with the delivery format and estimated timeframe as requested in each Task Authorization.

#### 6.2.2 Recruitment

##### **Deliverable 1: Recruiting Specifications – Participant selection**

- Provide draft recruitment script and screening questions for CRA's review and comments.
- Provide participants information to Project Authority for scheduled recruitment activities.

##### **Deliverable 2: Recruiting Specifications – Information Provided to Participants**

- Obtain CRA's approval on the final recruitment script.
- Initiate participants contact for recruitment and provide the following information as part of the generated recruitment script:
  - Disclosure that the recruitment is conducted on behalf of the CRA.
  - Purpose of the recruitment (e.g., assess new online tool, or improve sections of web content).
  - Expected length of session.
  - Advise that sessions are recorded (audio and screen only) and receive verbal or written consent from the participant. If consent is not given the participant cannot participate.
  - Personal information will be protected, and participants are anonymized in all presentation material (voices are not altered).
  - Participant(s) identifying information will not be included in any CRA recruitment summary report(s).
  - Usability testing or other UX related research sessions will be conducted by the CRA or, if applicable, by the Contractor on behalf of the CRA.
  - Compensation will be provided to each participant by the Contractor for the specialized recruiting, following each completed usability test or research session.



- Location, date and scheduled time of session.
  - Disclose any and all accommodations that are offered during the testing sessions.
- Provide any additional information that is more project specific to the participants, if requested by the Project Authority.

### **6.2.3 Moderated or unmoderated usability testing**

- Participate in half-day task prioritization workshops with internal DDPD subject matter experts, on an “as and when requested” basis, as scheduled by the Project Authority.
- Perform baseline usability testing and provide analysis of test results and user feedback.
- Create interactive prototypes based on the evidence provided by baseline testing and other research.
- Perform validation usability testing on the prototype to ensure issues discovered in baseline usability testing were addressed and KPIs were met.
- Provide final presentation deck to the Project Authority one week before scheduled presentation.
- Deliver presentation on sample metrics of the testing platforms to the Project Authority and internal CRA client stakeholder(s).

### **6.2.4 User Experience training**

- Provide draft documentation to the Project Authority for review and approval prior to scheduled User Experience training session.
- Finalize and distribute the training session documentation.
- Facilitate two introductory User Experience (UX) training sessions to CRA DDPD employees.

## **7.0 MEETINGS**

The Contractor must actively participate in any meetings requested by the Project Authority. Unless otherwise requested by the Project Authority, all meetings will be conducted virtually via Microsoft Teams or telephone and in either official language depending on the language preference of the participants. On-site presence at a CRA office location may be required as determined by the Project Authority.

## **8.0 PROGRESS REPORTING and COMMUNICATIONS**

Throughout the contract period, the Contractor must provide, as and when requested, written progress reports to include activities status, proposed plans, decisions, approaches, implementation and results of the work.

The Contractor must immediately report in writing to the Project Authority any circumstance or events affecting the provision of the required services.



## **9.0 LANGUAGE OF WORK**

Canada must respect the spirit of the Official Languages Act. As an agency of the federal government, the CRA is required under the Official Languages Act to provide its services in either official language of Canada.

The Contractor must provide all services fluently in English or French (oral, reading, writing) without any assistance and with minimal error to be able to communicate with the CRA.

## **10.0 LANGUAGE AND FORMAT OF DELIVERABLES**

Draft and final deliverables are to be provided in English and delivered using Microsoft word or other format, as otherwise requested by the Project Authority. Final deliverables will be translated by the CRA.

## **11.0 ACCEPTANCE CRITERIA**

All services rendered and deliverables completed in response to this contract must be in compliance with the requirements of the statement of work.

All deliverables must be formatted in the editable specified templates provided by the CRA.

All deliverables will be reviewed by the Project Authority for quality and completeness in a timely manner. The Contractor will incorporate any changes as required by the Project Authority.

## **12.0 CLIENT SUPPORT**

The Project Authority and Technical Lead will coordinate the overall project, providing as-required direction and guidance to the Contractor.

The CRA Project Authority will provide to the Contractor the following:

- Recruitment requirements for each project with specific profiles and demographic and other specified criteria;
- Specific policy and/or program related support, background documentation and information not easily accessible to the Contractor, including (but not limited to) government and departmental/agency policies, procedures, guidelines, templates, publications, key performance indicators (KPI) targets, reports and studies that may be required by the Contractor to complete the identified tasks and deliverables;
- Access to appropriate subject matter and technical experts from within the Agency;
- Availability to discuss, provide content, source and reference material;
- Assistance with facilitating cooperation with other government and/or non-government representatives;
- Electronic dropbox or e-mail addresses or location that deliverables will be submitted;



- Review on deliverables, feedback, approval and other assistance or support, as required to efficiently execute the requirements of the contract; and
- Record of all meeting including changes to action items.

### 13.0 CONTRACTOR OBLIGATION

It is the responsibility of the Contractor to complete all the Work under the Contract and any issued Task Authorization(s), while maintaining adherence to the following during the period of the contract.

- Be available to commence work upon contract award;
- Be available for the completion of all of the Contractor's responsibilities in relation to the contract;
- Ensure that the work is appropriately planned, organized, and carried out by qualified and experienced individuals;
- Ensure that all deployed resources are accredited and properly trained to fulfil their responsibilities. Resources should have education/training/certification in the field of UX and UX testing. Accreditation details must be disclosed and approved by the Project Authority.
- Ensure that all of its assigned resources are operating at all times in accordance with the SOW.
- Complete deliverables according to the pre-defined schedules and standards as outlined in the Task Authorization related to each project and the Statement of Work; and,
- Ensure that the Project Authority is copied on all electronic communications related to the contract.

### 14.0 CONSTRAINTS

- The Contractor is responsible for supplying their own workspace, computer and access to MS Teams, MS Office suite software and the internet.
- The CRA Project Authority and subject matter expert employees will be available to assist the Contractor during core business hours (8:00 and 17:00 EST/EDT) Monday through Friday (excluding statutory holidays).
- The Contractor must cooperate with the CRA management in regard to knowledge transfer.
- The Contractor will not have access to any protected information.
- All material developed will need to respect the Government of Canada's policies on [accessibility, values and ethics](#).
- The Contractor must not recruit persons who have participated in UX consultations with DDPD in the previous 12 months.
- The Contractor must make every reasonable attempt to avoid recruiting persons who personally know any person(s) who is conducting the recruiting.
- The Contractor must be aware that a task authorization project will often have additional recruiting specifications, not mentioned herein, that are specific to that project; and
- The Contractor must complete all deliverables by the end of the Contract period.



## **15.0 LOCATION OF WORK**

The location of the work will be remote, the responsibility and determination of which is by the Contractor. Face-to-face moderated sessions, will take place on an as and when required basis in the NCR, as detailed in the specific authorized Task Authorization.

## **16.0 CONFIDENTIALITY**

The Contractor must not, without the prior written permission of the CRA or applicable third parties, disclose to any other party, any such information or documentation, nor must the Contractor make use of the information or record/documentation of information for any purpose other than its duties under the contract.

The Contractor will not have any access to protected, classified or tax payers information during the period of the contract and must abide by the terms and conditions incorporated herein under [Section 3.2035 - General Conditions - Services - Buyandsell.gc.ca](#)

## **17.0 RECORDS MANAGEMENT**

At the completion of the contract, the Contractor must immediately and securely provide the Project Authority with all records of information collected during the course of work under the contract.



**Annex B: Basis of Payment**

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm all-inclusive hourly rate as specified at Annex B below, as specified in the authorized Task Authorization (TA). Customs duties are included and Applicable Taxes are extra.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been authorized, in writing, by the Contracting Authority before their incorporation into the Work.

<b>From Contract Award to Contract Completion Date</b>					
<b>User Experience (UX), Recruitment, Testing and Training Services</b>	<b>Firm All-Inclusive Hourly Rates (CDN \$)</b>				
	<b>Initial Contract Period-Year 1</b>	<b>Initial Contract Period-Year 2</b>	<b>Contract Option Period 1</b>	<b>Contract Option Period 2</b>	<b>Contract Option Period 3</b>
	<b>2023-2024</b>	<b>2024-2025</b>	<b>2025-2026</b>	<b>2026-2027</b>	<b>2027-2028</b>
	\$	\$	\$	\$	\$

**All payments are subject to Government audit**



**Annex C: USER EXPERIENCE (UX) VERIFICATION ACTIVITIES CATALOGUE**

<b>Name of UX Service</b>	<b>Description</b>
<b>Heuristic Evaluation (HE)</b>	<ul style="list-style-type: none"><li>• Systematic usability inspection of a user interface based on an agreed set of heuristics, performed by a trained UX specialist.</li><li>• Goal: Find usability problems in the design so that they can be addressed as part of an iterative design process.</li><li>• Involves having a small set of evaluators (2-4) to examine the interface and judge its compliance with recognized usability principles (the "heuristics").</li><li>• Provide the HE checklist that will be used by the moderator and evaluators.</li></ul>
<b>Cognitive Walkthrough</b>	<ul style="list-style-type: none"><li>• A trained UX specialist leads users through a concept or prototype.</li><li>• Typical workflow:<ul style="list-style-type: none"><li>○ Define the personas involved and define their goals</li><li>○ Define the user tasks</li><li>○ Walk-through the tasks step-by-step through the lens of the user (what terms they use, the things they'd look for and likely paths they'd take).</li><li>○ Identify and prioritize task-based usability issues</li><li>○ Provide design recommendations</li></ul></li></ul>
<b>Persona Research</b>	<ul style="list-style-type: none"><li>• A persona represents a cluster of users who exhibit similar behavioral patterns. They are fictional characters based on research to represent the different user types within a targeted demographic, attitude and/or behavior set that might use a website, application, or other deliverable in a similar way.</li><li>• Personas answer multiple questions:<ul style="list-style-type: none"><li>○ Who are the users?</li><li>○ What do they do?</li><li>○ How they accomplish the task?</li><li>○ When and why are they required/want to accomplish the task?</li><li>○ What are the triggers for the task?</li></ul></li><li>• An important component of persona research is user and task analysis which is the process of learning about typical users by observing them in action.</li><li>• In addition to answering the questions above, this service could involve a researcher interviewing users and</li></ul>



	<p>documenting their behavioral patterns and demographic information or the creation of a survey to be administered to a larger population of users.</p>
<b>Persona Creation</b>	<ul style="list-style-type: none"><li>• A UX specialist would analyze the research performed in the previous step and create personas. Specifically, they would group similar users together organized by patterns of behavior and they would define each user type and provide a clear understanding of how they relate to each other.</li><li>• Each persona should include a photo, some background information and brief descriptions of how the specified user type would use the website, service, or other deliverable.</li><li>• Once created, personas are validated via user interviews.</li></ul>
<b>Usage Scenario or Journey Map Creation</b>	<ul style="list-style-type: none"><li>• Usage scenarios or journey maps are natural extensions of user persona research and creation.</li><li>• Usage scenarios or journey maps are researched through observation, contextual inquiries, interviews and workshops with end users.</li><li>• The UX specialist would create usage scenarios or Journey Maps that documents specific trigger points, actions or tasks that individuals will perform as they interact with your software user interface.</li><li>• They capture what the user is doing, thinking, feeling along every step in the task or process and will detail opportunities and recommendations for improvement.</li></ul>
<b>Usability testing; moderated or un-moderated</b>	<ul style="list-style-type: none"><li>• Moderated, un-moderated, in person or remote, or a combination of the testing methods.</li><li>• Representative users are asked to complete typical tasks while observers watch, listen and takes notes.</li><li>• A short survey can be administered to participants in order to gather relevant demographic data.</li><li>• The report and material submitted should include (but is not limited to) success/failure and time on task data, video and audio clips of key pain points, and prioritized recommendations for improvement.</li></ul>
<b>Information Architecture (IA) validation</b>	<ul style="list-style-type: none"><li>• IA involves the act of shaping and organizing information to support usability and findability.</li><li>• IA validation would involve various UX verification methods such as card sorting and tree testing.</li><li>• Card sorting can be done with either physical cards, software tools or a combination thereof.</li></ul>



	<ul style="list-style-type: none"><li>• Tools such as TreeJack can be used to perform path analysis and identify issues with the information architecture.</li></ul>
<b>Content and Accessibility Verification</b>	<ul style="list-style-type: none"><li>• Phase 1 of this service would involve a UX Specialist performing research to understand a user's motivation for visiting the website. Not on a specific task level, but rather the type of reasons a user would come to the site.</li><li>• Phase 2 of this service would involve a UX Specialist analyzing the research performed in the previous phase and establishing a standard content format (style and arrangement). This standard content format could be implemented across the site to help users find and use information. Related to this would be the establishment and application of common or plain language use guidelines. Once users' motivations from the previous phases are analyzed, the UX Specialist could use various UX inspection methods to validate designs.</li><li>• Accessibility verification will ensure that all designs and content published by the CRA meets WCAG 2.0 AA conformance.</li></ul>
<b>Content Editorial and Plain Language Writing Services</b>	<ul style="list-style-type: none"><li>• Writing services to improve sections of the website or other CRA deliverables will follow Treasury board best practices, style guides and industry best practices for plain language.</li></ul>
<b>UX Design, prototyping development and validation</b>	<ul style="list-style-type: none"><li>• Based on evidence gathered from user testing and other research, UX design services based on industry best practices will be requested.</li><li>• The designs being produced will follow all Government standards for accessibility, and any other relevant standards that will be outlined in the Task Authorization.</li><li>• The deliverables may include wireframes using Balsamiq, functioning prototypes in HTML or Axure, visual task flows, design comps, etc. The specific format will vary depending on the project and the prototypes intended use.</li><li>• Occasionally the CRA may mandate that prototypes must be created using specific software or formats (e.g. Balsamiq, Axure, HTML, etc.)</li></ul>
<b>User Research and Ethnographic Research</b>	<ul style="list-style-type: none"><li>• Research into the user's specific needs, and their interaction with the CRA.</li><li>• Ethnographic research and long term studies of the observed behaviors of segments of taxpayers.</li></ul>



**Multivariate and A/B testing**

- Using diverse software tools to produce evidence-based, statistically accurate, results when comparing different UX designs of a variety of media.



**Annex D: TASK AUTHORIZATION FORM**

**AUTHORIZATION OF SERVICES TO BE PERFORMED ON AN AS-AND-WHEN-REQUESTED BASIS**

<b>Contractor:</b>			<b>Contract No.:</b>		
<b>Task Authorization No.:</b>			<b>Date:</b>		
<b>Language Required:</b>					
<b>Original</b>	<b>Y/N</b>	<b>Amendment</b>	<b>Y/N</b>	<b>Amendment No. (if applicable):</b>	

<b>1.0 DESCRIPTION OF THE TASK / WORK TO BE PERFORMED</b> <i>(to be completed by Project Authority)</i>	
<b>Project Authority</b>	<b>Email: Name@cra-arc.gc.ca</b>
<b>Contracting Authority</b>	<b>Email: Name@cra-arc.gc.ca</b>
<b>Tasks Details:</b> <i>(Outline the specific Tasks the Contractor will be required to complete under this TA)</i>	
<b>Deliverables:</b> <i>(Outline the specific Deliverables the Contractor will be required to complete under this TA)</i>	

<b>2.0 FEES</b> <i>(to be completed by Contractor)</i>
<i>Ex All-inclusive firm price per hour</i>
<b>Total</b>

<b>3.0 VALIDITY PERIOD</b>	
<b>Start Date:</b>	<b>End Date:</b>

<b>4.0 PROJECT AUTHORITY SIGNATURE</b>	
Project Authority (print name): _____	
Signature: _____	Date: _____

<b>5.0 CONTRACTING AUTHORITY SIGNATURE</b>	
Contracting Authority (print name): _____	
Signature: _____	Date: _____

You are requested to sell to the Canada Revenue Agency (CRA), in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the goods and/or services listed herein and on any attached sheets at the price(s) set out therefor.

<b>6.0 CONTRACTOR SIGNATURE</b>
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The Contractor hereby accepts the Task Authorization identified above.

Name of Contractor authorized to sign: (print name)	Title of Contractor authorized to sign: (print title)	Date:
Signature:		