

Addendum No. 1**Information Technology Staff Augmentation Services and Project Delivery Services**

Following are questions(s) (Q.); answer(s) (A.); modification(s) (M.) and notice(s) (N.) regarding RFSA 2023-3941.

Unless otherwise specified, capitalized words and terms have the meaning set out in the RFSA. In the event of any discrepancy, inconsistency or conflicts between the wording of the English or French version of this Addendum #1 or any related documents, the wording of the English version shall prevail.

Q1. Is this only open to the vendors that were recently selected for CDIC RFSA 2020-2842-2022 and RFSA 2020-2875-2022 or is it open to everyone and is a separate RFP?

A1. This RFSA is a new and separate opportunity and is open to any and all interested suppliers.

Q2. We are a current holder of 2020-2842 [redacted] for Information Technology Staff Augmentation and Project Delivery Services with CDIC. We were awarded this arrangement earlier this year and it looks like it expires in December 2023. Do we need to bid on this new RFSA in order to maintain our arrangement?

A2. Yes, Supply Arrangements Holders under RFSA 2020-2842 need to submit a bid in response to this RFSA 2023-3941 to be given consideration for this new RFSA.

Q3. Our company was granted the Request for Supply Arrangement (RFSA) for Information Technology Staff Augmentation and Project Delivery Services (RFSA 2020-2842 – 2021 Refresh), which concluded on January 24, 2022.

I would greatly appreciate your confirmation on whether it is necessary for us to reapply.

A3. Please see the response to Q2., above.

Q4. How does this recent RFSA #2023-3941 differ from the one we responded to and received a notice letter May 17, 2023, for RFSA 2020-2842-2022?

A4. Please see the response to Q1. Q2., and Q3., above.

Q5. Is the RFSA 2020-2842-2022 that we have only effective until December 14, 2023? Meaning, should we wish to have services beyond December 2023, we must submit against the new RFSA (2023-3941)?

A5. All Professional Services Agreement awarded under RFSA 2020-2842 will expire December 14. 2023. Please see the response to Q2., above.

Q6. Is this the exact same Supply Arrangement as the current one that we are qualified for?

- a. **What happens to our existing arrangement?**
- b. **Is this meant to replace the existing arrangement?**

- A6. Please see the responses to Q1., Q2., Q3., Q4. and Q5., above.
- Q7. To remain on the Supply Arrangement for CDIC, does [SA Holder] have to apply for this new one?**
- a. **Is there a grandfather method for applying or is it a full response?**
- A7. Please see the response to Q2., above.
- Q8. Is this a new initiative? If not, please provide the names of the current vendor(s) providing the services.**
- A8. Please see response to Q1., above.
- Q9. Can you please let us know the previous spending of this contract?**
- A9. Please see response to Q1., above. No Professional Services Agreement have been awarded under this process.
- Q10. Please confirm if we can get the proposals or pricing of the incumbent(s).**
- A10. Please see responses to Q1. and Q9., above.
- Q11. Are there any pain points or issues with the current vendor(s)?**
- A11. Please see responses to Q1. and Q9., above.
- Q12. Please confirm the anticipated number of awards.**
- A12. For Service Stream #1 (Staff Augmentation Services): up to twenty (20) Supply Arrangements. For Service Stream #2 (Project Delivery Services): unlimited number of Supply Arrangements.
- Q13. Our firm is very interested in participating in the above listed bid opportunity. However, we would like your advice with regard to the insurance requirements, as stated in the Professional Services Agreement. Currently, the maximum amounts for both our Cyber and Professional Liability insurance is \$5M. Would you kindly advise if these amounts are sufficient?**
- A13. The insurance provision in Schedule "E" (Form of Professional Services Agreement), Article 14 (Insurance), is standard for CDIC. Requests for changes to the Professional Services Agreement will not be considered by CDIC at this time. As per Section 14 of the RFSA (Resulting Agreements and Term of Agreement), CDIC intends to award agreements based on Schedule "F" (Form of Professional Services Agreement) to successful Suppliers. As such, any request for changes to the Professional Services Agreement will only be considered from successful Suppliers.
- Q14. Refer to Appendix "C-2" Reference Engagement Form specifically to the table with the list of roles on page 56-57 of the RFSA. Some of the roles are not matching the right Service Category. For example, Roles 35 to 39 are listed as Service Category 10 i.e., SC#10, roles 40 to 42 are listed as Service Category 11 i.e., SC#11 and roles 43 to 45 as Service Category 12 i.e., SC#12 etc. Could you please revise the roles and match them to the appropriate service categories?**

A14. Please see M1., below.

Q15. From page 1 of the Solicitation RFSA #2023-3941: the RFSA states that the Anticipated Award Date is October 12th, 2023, but the Anticipated Ranking and Commencement of Negotiations is October 20th with thirty (30) business days of a Contract Negotiation. Is the Anticipated Award Date meant to read November 12th as apposed to October 12th?

A15. Please see M2., below.

Q16. The requirement for references does not permit re-using the same reference more than once. Is it permissible to use multiple references to separate projects (each individually meeting the criteria for skills placed, number of days worked, start date and dollar value) which were carried out for a single client? Our organization holds a number of large omnibus IT staffing contracts (between \$15M and \$70M in value) which incorporate dozens of smaller discrete projects which meet CDIC's requirements.

A16. Yes, bidder may submit Reference Engagement Forms for separate engagements completed with the same client within a larger IT staffing contract.

Q17. Item 4.3 of the proposed Professional Services Agreement in Schedule F includes the following requirements:

Except as set out in Appendix A, the Supplier represents and warrants that:

- (a) The Supplier only carries on business in Canada;**
- (b) The Supplier does not have a parent, subsidiary or other related company that operates in a Non-Compliant Jurisdiction;**
- (c) The Supplier does not subcontract or outsource data processing or storage to any third party carrying on business in a Non-Compliant Jurisdiction; and**
- (d) The Supplier's employees are bound by written confidentiality agreements or binding confidentiality policies.**

Would a vendor be acceptable to CDIC if it included the following: an affiliated company which operates in the United States but which cannot access client data specific to CDIC (that data being stored exclusively in Canada and never transmitted across borders)?

A17. Yes, CDIC will accept a proposal from a Bidder parent company that has related subsidiaries or other related companies outside Canada, provided they are not performing the services outlined in this RFSA and resulting Professional Services Agreement, and do not access CDIC data.

Q18. Appendix "C-2" Reference Engagement Form on page 55 states: 'Bidder may not submit the same Reference Engagement more than once in its entire Proposal. For clarity, all Reference Engagement Forms submitted must be for different Engagements.' We are concerned that by including this requirement, the Crown may be unintentionally discriminating against otherwise highly qualified Bidders who have the depth and breadth of experience and expertise that CDIC deserves.

Bidders of this quality are often awarded complex, multi-year contracts supporting several transformative initiatives for an end client, each initiative with its own distinct start/end date and set of deliverables. Delivery of these large complex

contracts requires Bidders to provide a wide range of services, from project delivery to placement of individual resources to augment internal teams across the client's organization. To limit Bidders to demonstrating relevant project delivery and staff augmentation services from an Engagement only once in response to this RFSA prevents Bidders from fully demonstrating their capacity to provide the range of services CDIC requires.

To ensure CDIC receives the highest quality, we respectfully request CDIC confirms it will allow Bidders to demonstrate relevant experience using the same Engagement, providing that each Reference Initiative is distinct with its own start and end dates and set of deliverables.

A18. Please see response to Q16., above.

Q19. Appendix "A-1" on page 15 and Appendix "D-2" on page 63, it is not clear how CDIC intends to define the seniority levels as described in Appendix "A-1" and in Appendix "D-2". We respectfully request that CDIC please confirm that Level 1, Level 2 and Level 3 will be aligned with the years of experience as defined by the Federal Government for supply arrangements such as TBIPS, TSPS and ProServices.

Level 1: < 5 years of experience

Level 2: 5- < 10 years of experience

Level 3: 10+ years of experience

A19. CDIC will not consider aligning its experience levels with Federal Government supply arrangements. The levels for the Roles are as set out in Appendix "A-1" (Service Stream # 1: Staff Augmentation Services, Service Categories and Roles). Where a number of years' experience is provided for a role, it indicates the minimum qualification CDIC may consider if a requirement should arise. Notwithstanding, CDIC will specify the level and the number of years' experience in each resulting Service Request.

Q20. In para 5, can CDIC clarify the following sentence: "For clarity, all Reference Engagement Forms submitted must be for different Engagements". For example, if a cyber engagement included 3 roles in different categories: role 1 IT Executive Strategic Advisor, role 4 Project Manager, role 8 IT Security Architect could the same engagement be profiled if suitably tailored and qualify as 3 distinct Reference Engagement Forms? Similar example where engagement crosses between Strategy and say Business Intelligence and analytics, or between Service Stream 1 and 2.

A20. Yes. Please see response to Q16., above.

Q21. Can a 2-week extension to October 18 at 2pm be granted?

A21. Please see M2. below.

Q22. Schedule "A" – Definitions

"Engagement" means a specific body of work that was carried out pursuant to a specific client requirement/need;

Can CDIC please confirm what they mean by an "Engagement" within the context of the Reference Engagement Form? Is the engagement used in response to the form meant to reference the overall contract the Bidder has with their client, or can the engagement reference a specific project worked on by a placed Consultant within the overall contract with the Bidder's client?

A22. For Service Stream #1, the Reference Engagements should be for specific work by a placed Consultant within a contract with the Bidder's client. For Service Stream #2, the Reference Engagements should be for the overall contract with the Bidder's client, including all resources assigned to the project.

Q23. Appendix "C-2" – Reference Engagement Form, only two (2) Reference Engagement Forms may be submitted for each Service Category. If a Bidder submits more than two (2) Reference Engagement Forms for the same Service Category in its Proposal, CDIC will only evaluate the first two (2) Reference Engagement Forms submitted for that Service Category, in the order in which they appear in the Proposal.

If a Bidder is responding as a Joint Venture, can CDIC please confirm if it is possible to use contracts from either partner in the Reference Engagement Forms or if the contracts must come from one partner only?

A23. CDIC will not accept proposals from a Joint Venture.

Q24. Appendix "A-1" & Appendix "C-2", we have noticed a discrepancy between the 45 Roles for Service Stream #1: Staff Augmentation Services listed in Appendix "A-1" of the RFSA and the Roles listed within Appendix "C-2" (Reference Engagement Form). Specifically, the Service Categories #7, 8, 9, and 10 listed in Appendix "A-1" are not aligned to the Roles listed in the Reference Engagement Form.

Can CDIC please amend the Service Category Role checkbox form within Appendix "C-2" (Reference Engagement Form) to reflect the Roles listed in Appendix "A-1"?

A24. Please see M1., below.

Q25. Appendix "D-2", "For clarity, Rates are requested for information purposes only and will not be evaluated as part of this RFSA, however, will be the maximum ceiling rates under any resulting agreement for the duration of the term."

There may be confusion amongst Bidders in regard to how their Financial Offer will be evaluated as the statement in Appendix "D-2" contradicts Section 2.1 of Schedule "D", which states: "Without limiting Section 11, CDIC's Reserved Rights, of the RFSA, where a Bidder submits rates that are considered to be, in CDIC's sole and absolute discretion, commercially unreasonable, CDIC may deem the rates non-compliant and reject the Financial Offer."

Can CDIC please provide clarity regarding how the Bidder's Financial Offer will be evaluated and what rates they would consider to be "commercially unreasonable"?

A25. Rates are requested for information purposes only and will not be evaluated as part of this RFSA, however, will be the maximum ceiling rates under any resulting Agreement for the duration of the term. The provision contained in Schedule "D" (Financial Offer Requirements and Evaluation) Article 2 (Commercially Reasonable Rates) is standard in all CDIC solicitation documents.

Q26. Section 4. Scope, 5. DESCRIPTION OF SERVICES FOR EACH SERVICE STREAMS states: In order for a Bidder to be qualified to become an SA Holder under this Supply Arrangement, the bidder must qualify to provide Services in one or both of the following two (2) Service Streams by qualifying for at least one Service Category, (as set out in Appendix "A-1" (Service Stream #1: Staff Augmentation Services, Service Categories and Roles) and Appendix "A-2" (Service Stream #2: Project Delivery Services, Service Categories)), under the Service Stream(s), for which the

Bidder wishes to qualify.

Question: For Stream #1, Is a vendor required to have completed work for all roles under a service category to qualify?

A26. No. For Service Stream #1, Bidders that qualify for a specific Service Category will qualify for ALL Roles within that Service Category for which they have provided a rate in Appendix "D-2" (Financial Offer for Service Stream #1).

Q27. With regard to the reference engagements to be provided, do we have to submit 2 reference engagements for each service category per Service stream?

Or are we required to provide 2 reference engagements for each service category, irrespective of the Service Stream?

In other words, if a service category is present in both streams (staffing AND project delivery), and we plan to bid for this category in both streams, should we submit 4 reference engagements (2 per stream and per category)? Or would it be sufficient to present only 2 reference engagements (1 per category)?

A27. Bidders must submit two (2) Reference Engagement Forms for each Service Category within a Service Stream for which they wish to qualify for.

In the event that a Service Category is present in both Service Streams (staff augmentation AND project delivery), and the bidder intends to bid for this Service Category in both Service Streams, the bidder should present four (4) reference engagements (2 per Service Stream and per Service category).

Q28. We understand that this RFSA (2023-3941) is a re-refresh of SA_2020_2842 'Information Technology Staff Augmentation and Project Delivery Services'. The October 2023, the Completion Date would be October 2026.

The existing RFSA (2020-2842) was for a period of three years, extendable for two additional years at one-year increments, for a total of five years. Assuming the extensions are provided, the final Completion Date would be December 2025.

For the vendors that qualified under the original RFSA, would CDIC consider adding a third one-year (or 10 month) extension so that the Completion Date would align with the new RFSA October 2026)?

A28. No, CDIC will not consider. Please see the responses to Q1, Q2 and Q5 above.

Q29. Can you please confirm that Appendix "C-2" makes incorrect reference to 'Agile Application Delivery' under Stream 1 Service Category 7 (page 56 of the RFSA) and that it should instead read 'Alteryx Support'.

A29. Yes. Please see M1., below.

Q30. In Appendix "C-2" it asks for 'Total Level of Effort (Days)' (page 58 of RFSA). Can you clarify if this related to the duration of project or the total effort of all resources involved in the project i.e. if 2 people worked for 30 days each on a 30-day engagement should we enter 30 days or 60 days?

A30. For this RFSA, Total Level of Effort (Days) means the duration of the engagement or project and does not mean the total effort of all resources involved in a project.

Q31. On reviewing RFSA 2023-3941, we noticed that the service categories are very similar to the existing RFSA between CDIC and [redacted]. Does CDIC prefer that [redacted] renews the existing RFSA or would CDIC prefer [redacted] responds to RFSA 2023-3941?

A31. Please see the responses to Q2., and Q5., above.

Q32. Re: Appendix A – Could CDIC please confirm that there will be no additional option years added to this RFSA, and the End Date is officially December 31, 2026?

A32. Correct. No option years are contemplated under this RFSA and no option years can be added at a later date.

Q33. Re: Appendix A – If there were option years added, would there be another opportunity to qualify for additional roles at that time?

A33. Please see response to Q32., above. No refresh opportunity is contemplated for this RFSA.

Q34. Re: Appendix A – May a Supplier, if they happen to newly acquire a category capability, apply to qualify later (post-deadline, but within the 3-year period)?

A34. Please see responses to Q32., and Q33, above.

Q35. Re: Appendix A-2 – Will CDIC accept the same Reference Engagement Form for more than one (1) Service Category, provided the details are specific and relevant to each Service Category for which that Reference Engagement Form is provided as a reference. Is this still the case?

A35. Yes. Please see response to Q16., above.

Q36. What is the estimated budget for this RFP? If unknown, please provide the previous spending.

A36. Supply Arrangements awarded under this RFSA have no dollar value and no guarantee as to any volume or work. Please see response to Q9, above.

Q37. Is it acceptable if vendors propose U.S.-based references?

A37. Yes.

Q38. Do the US references stand in the same competition in comparison to Canada-based references?

A38. Yes.

Q39. Do the CDIC require references that were completed, or can the vendor provide references of engagement that are still active?

A39. All Reference Engagement Forms may indicate “on-going” as a completion date. For projects that include on-going maintenance and support or other ongoing deliverables; CDIC will only consider the completed portion of the project deliverable. For staff

augmentation placements that indicate “on-going”, the Engagement should contain a sufficient level of detail with technical experience and expertise in relation to the requirements in the RFSA.

Q40. Is it possible for CDIC to elaborate the term “Total Level of Effort (Days)” mentioned in Appendix “C-2”.

A40. All Reference Engagements must have a duration of at least twenty (20) working days. Any Reference Engagement that does not have a duration of at least twenty (20) working days will not be considered for evaluation and will be disqualified.

For further clarification, 7 hours equals 1 working day. Please see Q30., above.

Q41. Regarding the CDIC RFSA refresh vehicle, can you please confirm whether this will replace the current RFSA contract that was awarded in December 2020; expires in December 2024 with a one-year option period?

A41. Please see responses to Q1., Q2, and Q5, above.

Q42. We respectfully request an extension to the RFSA closing date to Friday, October 20, 2023 at 2:00 PM.

A42. Please see M2. below.

Q43. Schedule “B” Evaluation and Selection Process - Please confirm CDIC will accept customer references of a wholly-owned subsidiary of the Bidder in Step 3 - evaluation process of Rated Requirements - Technical Experience and Expertise.

A43. No. The Reference Engagements are intended to be for work completed by the bidder responding to this RFSA for external client engagements, excluding engagements where CDIC was a client.

Q44. Stream 2, Service Category #6 Salesforce Development - Salesforce Support was removed as a resource category from Stream 1. Please confirm Category #6 Salesforce Development is required. (just making sure it is not a copy paste error).

A44. No, Salesforce Support is not required for Service Stream #1.

Q45. Regarding Appendix A Acknowledgment of Subcontractors:

In Appendix A of the RFSA, it is mentioned that CDIC acknowledges the possibility of suppliers involving subcontractors. Could you kindly clarify whether we are required to provide the names of these subcontractors in our initial proposal, or if it is acceptable to furnish this information when a project is awarded to us?

A45. CDIC will not require the names of subcontractors with Bidder’s proposal in response to this RFSA.

Q46. Experience Requirements for Level 1-3 Roles in Service Stream #1:

Some job descriptions within Service Stream #1 specify the number of years of experience required, while others do not mention any specific experience requirements. Could you please define the number of years of experience expected

- for each level (Level 1, Level 2, Level 3)? Additionally, for roles that do not specify any experience, is it safe to assume that these roles can be classified as Level 1?
- A46. Please see response to Q19., above.
- Q47. Onshore vs. Offshore Resource Preferences for Service Stream #1:**
- Within Service Stream #1, are there any preferences or restrictions concerning the use of onshore and offshore resources? For instance, Role #9 seems to necessitate an onshore (100%-onsite) presence due to its nature, but for other roles, would offshore or hybrid resources be acceptable, provided they meet the necessary qualifications and criteria?**
- A47. CDIC interprets the Bidder's use of the term "Onshore" as resources completing work on-site at CDIC's premises and "Offshore" as resources completing work virtually or from the Bidder's premises. The location of work will be determined by CDIC at the time of the requirement and will be specified in a Service Request.
- Q48. C-2: For Stream #1, can CDIC please confirm if bidders need to provide two (2) reference engagement forms for each service category they select? For example, if a bidder were to select all ten (10) service categories under Stream #1, they would be required to submit twenty (20) reference engagement forms.**
- A48. Yes, that is correct.
- Q49. Is there a current vendor list for these services? if YES, which firms are currently on the list?**
- A49. Please see response to Q1., above.
- Q50. How many roles did you release to vendors over the past 12 or months?**
- A50. Please see response to Q1., above.
- Q51. How many roles do you anticipate releasing in the next 12 months?**
- A51. CDIC is unable to respond.
- Q52. What was the total spend in the past 12 months for resources or services requested through the vendor list?**
- A52. Please see response to Q1., and Q9., above.
- Q53. Are there any pain points with the current vendor list arrangement? If YES, can you describe them, and what CDIC would like to see improve going forward?**
- A53. Please see response to Q1., above.
- Q54. Appendix "C-1" (Technical Offer), Part 1 / Section 3 Rated Requirements, RR5. Quality Assurance and Service Levels (RFSA Page 53) and MS-Word Fillable Form: In the last RFSA, both Quality Assurance and Service Levels were addressed under 2 separate rated criteria (RR#5 Performance/Service Levels and RR#6 Quality Assurance) each with a maximum 500-word count (i.e., maximum total of 1,000 words for both). With this new RFSA, these 2 sections/criteria have been combined with a maximum 500-word limitation. For Bidders to provide the required detail to**

respond and clearly describe the Bidder's approach, would CDIC please consider increasing the maximum word count from 500 words to 1,000 words?

A54. CDIC will not increase the maximum word count.

Q55. Appendix "C-2" (Reference Engagement Form), Service Category profiled table (RFSA page 56) and MS-Word Fillable Form: There appears to be an error in Service Category # 7 which currently lists "Agile Application Delivery". Please confirm this should be modified to "Alteryx Support". Would it be permissible for Bidders to modify the MS-Word Fillable Form accordingly?

A55. No. Please see M1., below.

Q56. Appendix "C-2" (Reference Engagement Form), Roles profiled table (RFSA pages 56-57) and MS-Word Fillable Form: The numbering for Roles 34 – 45 are not aligned with Appendix "A-1" (Service Stream # 1: Staff Augmentation Services, Service Categories and Roles). Would it be permissible for Bidders to modify the MS-Word Fillable Form accordingly?

A56. No. Please see M1., below.

Q57. Schedule "E" (Required Forms), RFSA page 65: the Description and Requirement for Appendix "C-2" Reference Engagement Form currently states (Two (2) per Service Stream). Please confirm that this should be modified to (Two (2) per Service Category).

A57. Yes. Please see M3., below.

M1. Modification to Appendix "C-2" (Reference Engagement Form)

Appendix "C-2" (Reference Engagement Form), is AMENDED as follows:

Delete:

Appendix "C-2" (Reference Engagement Form)

and replace with:

Amended Appendix "C-2" (Reference Engagement Form)

Note: Suppliers are advised and instructed to use the newly revised Appendix "C-2" (Reference Engagement Form) Microsoft Word document titled Amended Appendix "C-2" (Reference Engagement Form), when completing proposals, which has been attached to this document and also uploaded to CanadaBuys as a fillable form.

M2. Modification to Summary of Key RFSA Dates

Section 4, Summary of Key RFSA Dates, of the RFSA, is AMENDED as follows:

Delete:

Request for Supply Arrangements	
Date of Issuance:	August 16, 2023
Deadline for Submission of Questions:	September 1, 2023, 2:00 p.m. Ottawa local time
CDIC Response to Questions:	By September 18, 2023
Deadline for Proposals:	October 4, 2023, 2:00 p.m. Ottawa local time
Anticipated Ranking and Commencement of Negotiations	October 20, 2023
Contract Negotiation Period	Thirty (30) business days
Anticipated Award Date:	On or about October 12, 2023
Proposal Validity Period:	120 days from Deadline for Proposals
Proposal Delivery Address:	procurement@cdic.ca
CDIC Procurement Advisor:	Judy Ann Hollander

and replace with:

Request for Supply Arrangements	
Date of Issuance:	August 16, 2023
Deadline for Submission of Questions:	September 1, 2023, 2:00 p.m. Ottawa local time
CDIC Response to Questions:	By September 18, 2023
Deadline for Proposals:	October 11, 2023, 2:00 p.m. Ottawa local time
Anticipated Ranking and Commencement of Negotiations	October 20, 2023
Contract Negotiation Period	Thirty (30) business days
Anticipated Award Date:	On or about November 12, 2023
Proposal Validity Period:	120 days from Deadline for Proposals
Proposal Delivery Address:	procurement@cdic.ca
CDIC Procurement Advisor:	Judy Ann Hollander

M3. Modification to Schedule “E” (Required Forms)

Schedule “E” (Required Forms) is AMENDED as follows:

Delete:

The following is a list of required forms which must be included in the bidder’s Proposal as applicable.

Appendix	Description and Requirement
<u>Schedule “C”</u>	Technical Offer Submission Form
<u>Appendix “C-1”</u>	Technical Offer <i>(One (1) per Proposal)</i>
<u>Appendix “C-2”</u>	Reference Engagement Form <i>(Two (2) per Service Stream)</i>
<u>Appendix “D-1”</u>	Financial Offer Submission Form
<u>Appendix “D-2”</u>	Financial Offer for Service Stream # 1 <i>(as applicable)</i>

and replace with:

Appendix	Description and Requirement
<u>Schedule “C”</u>	Technical Offer Submission Form
<u>Appendix “C-1”</u>	Technical Offer <i>(One (1) per Proposal)</i>
<u>Appendix “C-2”</u>	Reference Engagement Form <i>(Two (2) per Service Category)</i>
<u>Appendix “D-1”</u>	Financial Offer Submission Form
<u>Appendix “D-2”</u>	Financial Offer for Service Stream # 1 <i>(as applicable)</i>

Amended Appendix “C-2”

Reference Engagement Form

All changes are in red font.

INSTRUCTIONS TO BIDDERS: Bidders are required to use the form provided in this Appendix “C-2” using only the Service Category name and Role referred in this RFSA for which the Bidder wishes to be qualified.

The Bidder must identify, in Section 1 of the Reference Engagement Form, both the Service Stream and Service Category to which the Reference Engagement Form applies by placing an (X) in the box beside the name of the Service Stream and the applicable Service Category to which the Reference Engagement Form relates, respectively. If the Bidder places an (X) in more than one box, CDIC will only evaluate the Reference Engagement indicated by the first box in which an (X) appears. For a Service Category under Service Stream #1 ONLY, Bidders should also identify at least one (or more) relevant Role(s) by placing an (X) in the box beside the name of the Role(s).

Bidders are NOT required to submit separate Reference Engagements Forms for each of the forty-five (45) Roles under Service Stream #1 or map each Role to their specific responsibilities/ qualifications. Bidders that qualify for a specific Service Category will qualify for ALL Roles for which they have provided a rate in Appendix “D-1” (Financial Offer for Service Stream #1).

Only two (2) Reference Engagement Forms may be submitted for each Service Category. If a Bidder submits more than two (2) Reference Engagement Forms for the same Service Category in its Proposal, CDIC will only evaluate the first two (2) Reference Engagement Forms submitted for that Service Category, in the order in which they appear in the Proposal.

Bidder may not submit the same Reference Engagement more than once in its entire Proposal. For clarity, all Reference Engagement Forms submitted must be for different Engagements. If the Bidder submits the same Reference Engagement more than once, CDIC will only evaluate once, the first time it appears in the Proposal.

All Reference Engagement Forms must reflect Engagements the Bidder has started after January 1, 2020, and prior to the Proposal Submission Deadline. Any Engagement with a start date prior to January 1, 2020, or after the Proposal Submission Deadline will not be given further consideration in this evaluation process. All Reference Engagement Forms may indicate “on-going” as a completion date. For projects that include on-going maintenance and support or other ongoing deliverables; CDIC will only consider the completed portion of the project deliverable. For staff augmentation placements that indicate “on-going”, the Engagement should contain a sufficient level of detail with technical experience and expertise in relation to the requirements in the RFSA.

All Reference Engagements must have a dollar value of at least \$25,000 CAD OR a statement confirming that the Reference Engagement value was a minimum of \$25,000 CAD. Any Reference Engagement that does not have a dollar value of at least \$25,000 CAD OR a statement confirming that the Reference Engagement value was a minimum of \$25,000 CAD will not be considered for evaluation and will be disqualified.

All Reference Engagements must have a duration of at least twenty (20) working days. Any Reference Engagement that does not have a duration of at least twenty (20) working days will not be considered for evaluation and will be disqualified.



Engagement Profiles may be for Reference Engagements conducted for external clients in either the public or private sector, **excluding CDIC**. Private sector related Reference Engagements are not limited to clients within the financial sector/services.

The Reference Engagements are not limited to Engagements completed in Canada. Bidders should provide the applicable information requested that accurately describes their organization as it relates to providing the Services required by CDIC as described in the RFSA.

Without limiting the reserved right of CDIC to verify references other than those provided by the bidder, CDIC, in its sole discretion, may, during this RFSA evaluation process, contact any references to verify the information provided and/or confirm the Bidder's experience and/or ability to undertake the Engagement/provide the services required and described in the bidder's Proposal.

The bidder must not alter the format of the table below in any way, other than to remove highlighted text and add hard returns to provide responses. Columns and rows are not to be added or deleted.

Part 2 – Technical Experience and Expertise - Rated Requirements (Maximum Points – 100 Points per Reference Engagement)

NOTE: Bidder should complete and submit two (2) Reference Engagement Forms for each Service Category.

Bidder's Legal Name:	[Insert legal name of company/firm who provided the services under this Engagement]
	<i>"Bidder's Legal Name" provided in the Reference Engagement Form is the same as the Bidder's legal name provided in Schedule "C" (Technical Offer Submission Form) and was responsible for and had control of the work of its personnel and/or subcontractors.</i>

1. Rated Requirements	
The bidder should identify the Service Stream profiled in this Reference Engagement (ONLY 1 Service Stream per Reference Engagement) by placing an "X" in the applicable box.	
Service Stream	
<input type="checkbox"/> 1. Service Stream #1: Staff Augmentation	<input type="checkbox"/> 2. Service Stream #2: Project Delivery Services

The Bidder must identify the Service Category profiled in this Reference Engagement (ONLY 1 Service Category per Reference Engagement) by placing an "X" in the applicable box.					
	#	Service Category (SC)		#	Service Category (SC)
<input type="checkbox"/>	1	Advisory Services	<input type="checkbox"/>	1	Strategy
<input type="checkbox"/>	2	Project Management	<input type="checkbox"/>	2	Architecture
<input type="checkbox"/>	3	Cyber Security	<input type="checkbox"/>	3	Security and Risk
<input type="checkbox"/>	4	Enterprise Technology	<input type="checkbox"/>	4	Infrastructure
<input type="checkbox"/>	5	Technical Support	<input type="checkbox"/>	5	Business Application Solutions
<input type="checkbox"/>	6	SharePoint Support	<input type="checkbox"/>	6	Salesforce Development
<input type="checkbox"/>	7	Alteryx Application Delivery	<input type="checkbox"/>	7	Business Intelligence and Analytics
<input type="checkbox"/>	8	Application Development	<input type="checkbox"/>	8	ServiceNow Solutions
<input type="checkbox"/>	9	Business Intelligence and Analytics			
<input type="checkbox"/>	10	ServiceNow Development			

For a Service Category under Service Stream # 1 ONLY, the Bidder should identify one or more Role(s) profiled in this Reference Engagement by placing an “X” in the applicable box.

	#	Role		#	Role
<input type="checkbox"/>	1	IT Executive Strategic Advisor (SC#1)	<input type="checkbox"/>	25	Application Support Specialist (SC#5)
<input type="checkbox"/>	2	Data Strategy Advisor (SC#1)	<input type="checkbox"/>	26	Deskside Technical Support Analyst (SC#5)
<input type="checkbox"/>	3	Project Management Office Lead (SC#2)	<input type="checkbox"/>	27	Service Desk Analyst (SC#5)
<input type="checkbox"/>	4	Project Manager (SC#2)	<input type="checkbox"/>	28	IT Service Management Specialist (SC#5)
<input type="checkbox"/>	5	Project Administrator (SC#2)	<input type="checkbox"/>	29	Infrastructure Operations and Support (SC#5)
<input type="checkbox"/>	6	Security Analyst (SC#3)	<input type="checkbox"/>	30	Technical Writer / Trainer / Courseware (SC#5)
<input type="checkbox"/>	7	Application Security Administrator (SC#3)	<input type="checkbox"/>	31	SharePoint Online Administrator (SC#6)
<input type="checkbox"/>	8	IT Security Architect (SC#3)	<input type="checkbox"/>	32	SharePoint Online Architect (SC#6)
<input type="checkbox"/>	9	Ethical / White Hat Hacker (SC#3)	<input type="checkbox"/>	33	SharePoint Online Developer (SC#6)
<input type="checkbox"/>	10	Azure Security Architect (SC#3)	<input type="checkbox"/>	34	Alteryx Developer (SC#7)
<input type="checkbox"/>	11	Azure Security Administrator (SC#3)	<input type="checkbox"/>	35	Solution Architect (SC#8)
<input type="checkbox"/>	12	Cyber Forensics Specialist (SC#3)	<input type="checkbox"/>	36	Business Analyst (SC#8)
<input type="checkbox"/>	13	Security Engineer (Application / Network) (SC#3)	<input type="checkbox"/>	37	Application Developer (SC#8)
<input type="checkbox"/>	14	SOC Analyst (SC#3)	<input type="checkbox"/>	38	Azure Cloud Application Developer (SC#8)
<input type="checkbox"/>	15	SOC Lead/Manager (SC#3)	<input type="checkbox"/>	39	Quality Assurance (QA) Tester (SC#8)
<input type="checkbox"/>	16	Cloud Security Specialist (SC#3)	<input type="checkbox"/>	40	Business Intelligence Developer (SC#9)
<input type="checkbox"/>	17	Security Administrator (SC#3)	<input type="checkbox"/>	41	Data Architect (SC#9)
<input type="checkbox"/>	18	Governance Risk and Compliance Analyst (SC#3)	<input type="checkbox"/>	42	Data Scientist (SC#9)
<input type="checkbox"/>	19	Storage Admin / Virtualization Architect (SC#4)	<input type="checkbox"/>	43	ServiceNow Developer (SC#10)
<input type="checkbox"/>	20	Systems Architect (SC#4)	<input type="checkbox"/>	44	ServiceNow Implementation Specialist (SC#10)
<input type="checkbox"/>	21	Azure Architect (SC#4)	<input type="checkbox"/>	45	ServiceNow Solution Architect (SC#10)
<input type="checkbox"/>	22	Azure Administrator (SC#4)			
<input type="checkbox"/>	23	Azure Data Base Administrator (SC#4)			
<input type="checkbox"/>	24	Webmaster (SC#4)			

2. Engagement Reference - Client (Company) Contact Information	
Client (Company) Name:	<<External client in private or public sector, excluding CDIC>>
Client (Company) Address:	
Client (Company) Contact Person Name:	
Title:	
Telephone #:	
Email:	

3. Engagement Profile Details			
Engagement/Project Name:			
Engagement Dollar Value:	\$<<must have a dollar value of at least \$25,000 CAD OR a statement confirming that the Reference Engagement value was a minimum of \$25,000 CAD >>		
Engagement Start Date: (mm/dd/yyyy)		Total Level of Effort (Days): (7 hours equals 1 working day)	Days <<must have a duration of at least twenty (20) working days>>
Engagement End Date: (mm/dd/yyyy)			

Part 2 – Service Stream Specific Technical Experience and Expertise - Rated Requirements - Reference Engagements – (Maximum Points – 200 Points - 100 Points per Reference Engagements)

Each Service Category will be evaluated separately. Bidder to complete Appendix “C-2” (Reference Engagement Form).

4. Technical Experience and Expertise (Maximum Points - 100)
<p>RR4.1 Scope and Type of Services – (Maximum Points – 40)</p> <p><i>Bidder should clearly describe in detail the scope and type of services provided, including any similarities/relevance between the client and CDIC’s organizations.</i></p> <p><i>The details should clearly demonstrate relevance to the scope of the respective Service Category described in <u>Appendix “A-1”</u> and <u>Appendix “A-2”</u>, as applicable, for each Service Category under a Service Stream the Bidder is offering as part of its Proposal.</i></p> <p>NOTE: For a Service Category under Service Stream #1 ONLY, the Bidder should also clearly describe relevance to the scope of at least one Role as described in <u>Appendix “A-1”</u>.</p>

A4.1 (Maximum of 500 words)

RR4.2 Client Management – (Maximum Points – 15)

Bidder should describe in detail how the Engagement was approached by addressing each of the following items:

- a) *Understanding and delivery of the client's vision;*
- b) *Methodologies and tools used to complete the deliverables;*
- c) *Managing client feedback and changes; and.*
- d) *Ensuring client engagement and involvement.*

A4.2 (Maximum of 500 words)

RR4.3 Knowledge Transfer – (Maximum Points – 15)

Bidder should describe, in detail:

- a) *the processes used by the bidder to transfer knowledge to the client upon completion of this Engagement (e.g., reports, training, user manual).*

A4.3 (Maximum of 500 words)

RR4.4 Outcome of Engagement – (Maximum Points – 15)

Bidder should describe in detail:

- a) *the outcome of this Engagement.*

A4.4 (Maximum of 500 words)

RR4.5 Success Factors – (Maximum Points – 15)

Bidder should describe in detail:

- a) *the critical success factors and how bidder contributed to achieving the outcome.*

A4.5 [(Maximum of 500 words)

ALL OTHER TERMS AND CONDITIONS OF THE RFSA REMAIN UNCHANGED.

[END OF ADDENDUM NO. 1]