



RETURN BIDS TO:

IRCC.BidsReceiving-Receptiondessoumissions.IRCC@cic.gc.ca

Attn: Manon Delorme

FOR ELECTRONIC BIDS:

The electronic mailbox is equipped to send an automatic reply to all messages received. If you do not receive an automatic response, please contact the Contracting Authority to ensure your bid was received. Please note that it is the bidder's sole responsibility to ensure that all bids submitted are received in their entirety by Citizenship and Immigration Canada by the closing date and time indicated in this RFP.

IMPORTANT NOTICE TO SUPPLIERS

The Government Electronic Tendering Service on buyandsell.gc.ca/tenders will be the sole authoritative source for Government of Canada tenders that are subject to trade agreements or subject to departmental policies that require public advertising of tenders.

REQUEST FOR PROPOSAL

Proposal To: Citizenship and Immigration Canada

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

Instructions : See Herein

Instructions: Voir aux présentes

Issuing Office – Bureau de distribution

Citizenship and Immigration Canada

Procurement and Contracting Services

70 Crémazie

Gatineau, Québec K1A 1L1

Title – Sujet	
Helpdesk Service Tool	
Solicitation No. – N° de l'invitation	Date
CIC - 155593	August 30th, 2023
Solicitation Closes – L'invitation prend fin at – à	Time Zone
3:00 PM	Fuseau horaire
on – October 9th, 2023	UTC-4 EDT
F.O.B. - F.A.B.	
Plant-Usine: <input type="checkbox"/>	Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>
Address Inquiries to: - Adresser toutes questions à :	
IRCC.BidsReceiving-Receptiondessoumissions.IRCC@cic.gc.ca	
Telephone No. – N° de téléphone :	
Destination – of Goods, Services, and Construction: Destination – des biens, services et construction :	
See Herein	
Delivery required - Livraison exigée	
See Herein	
Vendor/firm Name and address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Facsimile No. – N° de télécopieur	
Telephone No. – N° de téléphone	
Name and title of person authorized to sign on behalf of Vendor/firm	
Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur	
(type or print)/ (taper ou écrire en caractères d'imprimerie)	
Signature	Date



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PART 1 - GENERAL INFORMATION

1.1 Introduction

The bid solicitation is divided into seven parts plus attachments as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;
- Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;
- Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;
- Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by Bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

1.2 Summary

1.2.1 The Department of Immigration, Refugees and Citizenship Canada (IRCC) has a requirement for a commercial web hosted business solution for a Helpdesk Tool that will enable IRCC users to effectively and efficiently manage IRCC's interactions with the public via its official social media channels. The solution will amalgamate all of the incoming questions and comments from IRCC's current social media channels. The web platform will need to allow IRCC users to login remotely via a web portal.

1.2.2 Single Contract

Canada is seeking to establish a contract for a remote login client relationship management tool as defined in Appendix "D", Statement of Work, for five (5) years including all options.

The requirement is subject to the provisions of the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), and the Canadian Free Trade Agreement (CFTA)."

Considering accessibility criteria and features is obligatory with this requirement. For additional information consult the [Treasury Board Contracting Policy](#). See Appendix "D Statement of Work.



1.3 Debriefings

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within fifteen (15) working days of receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone, or in person.

If you have any concerns relating to the procurement process, please refer to the [Bid Challenge and Recourse Mechanisms](#) page on the Buyandsell.gc.ca website. Please note that there are strict deadlines for filing complaints with the Canadian International Trade Tribunal (CITT) or the Office of the Procurement Ombudsman (OPO).

1.4 Mandatory Requirements

Where the words “must”, “shall” or “will” appear in this RFP, the clause is to be considered as a mandatory requirement.



PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

All Citizenship and Immigration Canada (CIC) instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out on the [CIC Website](#).

All SACC manual clauses for specific instructions not covered by the standard instructions 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.

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

The [CIC-SI-001 \(2016-05-26\)](#) Standard Instructions – Goods or Services Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

2.2 Submission of Bids

Bids must be submitted only to Citizenship and Immigration Canada by the date, time and place indicated on page 1 of the bid solicitation.

Due to the nature of the bid solicitation, bids transmitted by facsimile will not be accepted.

2.3 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than five (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 questions or may request that the Bidder do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

2.4 Applicable Laws

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

Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or



territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidders.

2.5 Former Public Servant

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

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 in accordance with [Contracting Policy Notice: 2012-2](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

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.



PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

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

Section I: Technical Bid – One (1) Electronic Copy via email.

Section II: Financial Bid – One (1) Electronic Copy via email.

Section III: Certifications – One (1) Electronic Copy via email.

Canada requests that respondents submit their response in unprotected (i.e. no password) PDF format by email. Complete size of emails containing a response must not exceed 10MB. Emails exceeding 10MB will not be received. Should the size of email(s) exceed 10MB, respondents must contact the Contracting Authority at least 48 hours prior to the closing date to discuss alternatives.

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

Canada requests that bidders follow the format instructions described below in the preparation of their bid:

- (a) use a numbering system that corresponds to the bid solicitation; and
- (b) page numbering must be used on the bottom right of each page of the proposal

In accordance with the [Treasury Board Contracting Policy](#) and the *Accessible Canada Act*, federal departments and agencies must consider accessibility criteria and features when procuring goods or services. Therefore, bidders are encouraged to highlight all the accessibility features and components of their proposal for this Statement of Work (SOW) and must:

- (i) demonstrate how the bidder's proposed goods and/or services meet the accessibility requirement at delivery; or
- (ii) describe how the bidder would deliver its goods and/or services under any resulting contract in a way that satisfies the mandatory requirement.

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 Bid

Bidders must submit their financial bid in accordance with Appendix “E”, Basis of Payment. The total amount of applicable taxes must be shown separately, if applicable.

Bidders should include the following information in their financial bid by completing Appendix “I”, Vendor Information and Authorization and include it with their bid:

1. Their legal name;
2. Their [Business Number](#) (BN); and
3. The name of the contact person (including this person's mailing address, phone and facsimile numbers, and email address) authorized by the Bidder to enter into communications with Canada with regards to:
 - a) their bid; and
 - b) any contract that may result from their bid.

The Bidder's per diem rates in response to this RFP and resulting contract(s) must include all overhead, general & administrative costs and profit. Included are the following costs that may be incurred in providing the required services: office space, computer hardware and software, word processing, preparation of reports, photocopying, courier services, facsimile services, telephone services, local travel expenses, and administration related to non-local travel expenses. "Local" as used here is defined as where the Work is to be performed in Canada as may be specified in the RFP and the resulting Contract(s).

Bidders must provide in their financial bid a price breakdown as detailed in Appendix “E”, Basis of Payment.

3.2 SACC Manual Clauses

C3011T (2013-11-06) - Exchange Rate Fluctuation

The requirement does not provide for exchange rate fluctuation protection. Any request for exchange rate fluctuation protection will not be considered and will render the bid non-responsive.

Section III: Certifications

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



PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.

4.1.1 Technical Evaluation

4.1.1.1 Mandatory Technical Criteria

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

Mandatory requirements are evaluated on a simple pass or fail basis. Failure by a Bidder to meet any one of the mandatory requirements will render the Bidder's proposal **non-responsive and will not be given further consideration**. The treatment of mandatory requirements in any procurement process is absolute. Each mandatory technical criterion should be addressed separately.

Mandatory Technical Criteria (MT)			
Number	Mandatory Technical Criterion	Bid Submission Requirement	MET / NOT MET
M1	The Bidder must be able to complete, fully integrate and deliver the Helpdesk tool as per all requirements within the Statement of Work.	To demonstrate compliance with this criterion, at bid submission, the Bidder must provide a letter, signed by authorized representative of the Bidder, certifying that they can meet this criterion.	
M2	The solution must include or can be configured to include, standard fields for social media interactions: <ul style="list-style-type: none"> o Social media username (e.g. Twitter handle, Facebook username) o Channel of interaction (e.g. Twitter, Facebook) including the ability to create different groups within any of the channels o Ability to divide between groups across different channels 	In order to demonstrate this functionality, the Bidder must provide screenshots from their tool that demonstrate this functionality;	



	<ul style="list-style-type: none"> ○ Conversation history between the social media user and IRCC ○ Ability to split comments (e.g. Facebook) and create a new ticket. ● Metadata associated with the conversation history (e.g. tags, notes, timestamps, Helpdesk users engaged, interaction status); and ● Public profile information, as provided by the social media user. 		
M3	<p>The solution must:</p> <ul style="list-style-type: none"> ● allow a User to tag and untag assignments, and data must be filterable and exported by these tags. ● include an internal notes function that users can post against a record. ● allow users to edit, create and associate at least 50 tags to each record. ● automatically re-assign enquiries from returning clients to the same Helpdesk user. ● include real-time information on the time a ticket has been opened (i.e. assigned but not resolved by IRCC users). ● maintain a database of all client engagements and transactions 	<p>In order to demonstrate this functionality, the Bidder must provide screenshots from their tool that demonstrate this functionality;</p>	
M4	<p>The Solution must allow users to perform searches using fields such as:</p> <ul style="list-style-type: none"> ○ Customizable date and date range ● Limiting keyword and tag searches to specific time frames ● Filters that show tickets by last modified, date created, ascending and descending ○ Type ○ Status ○ Social channels (Facebook and Twitter) and groups (within Facebook and Twitter) ○ Keywords and/or tags that can be stacked/excluded 	<p>In order to demonstrate this functionality, the Bidder must provide screenshots from their tool that demonstrate this functionality;</p>	



	<ul style="list-style-type: none"> ○ Sentence / phrase ○ Social media username ○ Helpdesk user ● Filtering tickets by assigned agent who closed the ticket ● Filtering tickets by assigned agent who sent response ● Line of business tag groups, and sub-groups 		
M5	<p>The Solution's search function must:</p> <ul style="list-style-type: none"> ● allow users to search using full or truncated keywords or terms. ● maintain a searchable database of all client engagements and transactions. 	In order to demonstrate this functionality, the Bidder must provide screenshots from their tool that demonstrate this functionality;	
M6	<p>Helpdesk users must have the ability to view the following:</p> <ul style="list-style-type: none"> ● Open assignments: <ul style="list-style-type: none"> ● List of all open tickets (i.e. unresolved client interactions) ● Time elapsed for open tickets ● Full interaction history and metadata (tags, notes, timestamps) for open tickets ● Filterable by fields such as: Helpdesk user, ticket status, timeframe, platform, tag. ○ All assignments: <ul style="list-style-type: none"> ● Filterable through search, based on keywords, tags, notes, social media username. ● Filterable by fields such as: Helpdesk user, ticket status, timeframe, platform, tag. Filterable by social network, message type, assignment options (to, by, resolved by). 	In order to demonstrate this functionality, the Bidder must provide screenshots from their tool that demonstrate this functionality;	
M7	<p>The Solution must:</p> <ul style="list-style-type: none"> ● allow users the ability to customize, generate, and download reports so that they 	In order to demonstrate this functionality, the Bidder must provide screenshots from their CS that demonstrate this functionality;	



	<p>can be run from within the system within a specific date range:</p> <ul style="list-style-type: none"> • Assignments with specific tag(s) • Assignments resolved per individual • Assignments created per 'group' • Assignments resolved per 'group' • Pickup/handling time per individual, team and/or with specific tags within a specific date range • Average resolution time/ratio per individual, team and/or with specific tags within a specific date range • Inbound message topics (based on social media user metadata) • Timeframe • Key words • Aggregate vs. individual data 		
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4.1.1.2 Point Rated Technical Criteria

Each Technical Bid that meets all the Mandatory Requirements specified above will be evaluated and scored in accordance with the following point-rated evaluation criteria table(s). Each point rated technical criterion should be addressed separately.

For each project summary provided, Bidders are required to provide specific dates (month and year) of experience as well as the total duration of project (number of months). The month(s) of experience listed for a project whose timeframe overlaps that of another referenced project will only be counted once. For example: Project 1 timeframe is July 2001 to December 2001; Project 2 timeframe is October 2001 to January 2002; the total months of experience for these two project references is seven (7) months.

Point Rated Technical Criteria (RT)				
Number	Rated Technical Criterion	Bid Submission Requirement	Evaluation Criteria	Maximum Points
RT1	The Bidder's solution allows Boolean operators in the search function.	<p>In order to demonstrate this functionality, the Bidder must provide:</p> <ul style="list-style-type: none"> a. Screenshots from their solution that demonstrate this functionality 	<p>Points will be allocated as follows:</p> <ul style="list-style-type: none"> 1. The Bidder failed to provide demonstrate this criterion (0 points). 1. The solution can perform this function (3 points). 	3



RT2	The Bidder will provide licenses for at least 25 users and up to 50 users.	To demonstrate compliance with this criterion, at bid submission, the Bidder must provide a letter, signed by authorized representative of the Bidder, certifying that they can meet this criterion.	<p>Points will be allocated as follows:</p> <ol style="list-style-type: none"> 1. The Bidder will provide licenses for 25 users (1 point) 2. The Bidder will provide licenses for 26– 30 users (3 points) 3. The Bidder will provide licenses for 31 – 39 users (5 points) 4. The Bidder will provide licenses for 40 – 50 users (7 points) 	7
RT3	The solution allows a user to view omni-channel analytics, comparing ticket volumes, and data from different support channels against others.	<p>In order to demonstrate this functionality, the Bidder must provide:</p> <ol style="list-style-type: none"> a. Screenshots from their solution that demonstrate this functionality; and 	<p>Points will be allocated as follows:</p> <ol style="list-style-type: none"> 1. The Bidder failed to provide demonstrate this criterion (0 points). 2. The Bidder demonstrated the solution has the functionality. (5 points). 	5
RT4	The Bidder demonstrates their solution allows for contextual workplaces, which allow users to adjust which tools will become available to a user within a ticket view, based on a set of user determined rules.	<p>In order to demonstrate this functionality, the Bidder must provide:</p> <ol style="list-style-type: none"> a. Screenshots from their solution that demonstrate this functionality; and 	<p>Points will be allocated as follows:</p> <ol style="list-style-type: none"> 1. The Bidder failed to provide demonstrate this criterion (0 points). 2. The Bidder demonstrated the solution has the functionality. (5 points). 	5



RT5	<p>Bidders should demonstrate the following corporate activities they have implemented to promote anti-racism and diversity within their organisation:</p> <ol style="list-style-type: none"> The bidder has internally published policies or commitments on anti-racism and inclusiveness; The bidder’s employees are mandated to take mandatory training on anti-racism; The bidder’s employees are mandated to take unconscious bias training; The bidder has publically available organisational commitments to a diverse workforce; The bidder has developed internal staffing and/or recruitment strategy(ies) to increase representation of underrepresented groups in their workforce. 	<p>The bidder should provide details of the activity.</p> <p>The bidder should provide copies of policy or commitment documents including their effective date.</p> <p>For training, the bidder should provide the name of the course and the service provider; if developed internally, a copy of the course outline.</p> <p>For staffing, the bidder should provide copies of job posting, or other staffing/recruitment documents demonstrating compliance with the rated criteria.</p>	<p>Maximum 0.5 points for each activity.</p> <p>0 pts = the bidder does not address. 0.5 pts =The bidder has fully described the activity and provided supporting documents as evidence. 0.25 pts = The bidder has provided information on the existence of the activity but does not provide sufficient detail or supporting documents.</p> <p>Additional Points (Max 1 pts):</p> <p>1 pts - Bidder has demonstrated at least the existence of 4 out of 5 activities. 0.5pt – Bidder has demonstrated at least 2 of the 5 activities.</p>	3.5
Total Maximum				23.5

4.1.2 Financial Evaluation

Only the proposals that are technically responsive will be considered for financial evaluation.

The price of the bid will be evaluated in Canadian dollars, applicable taxes are excluded.

For the purposes of bid evaluation, Basis of Payment, Appendix “E” will be used. The Bidder must provide all inclusive price for the services being proposed in accordance with the bid solicitation, for the initial contract period and option periods.



The volumetric data included in the pricing schedule detailed in Appendix “E”, Basis of Payment is provided for bid evaluated price determination purposes only. They are not to be considered as a contract guarantee.

The “TOTAL EVALUATED PRICE” in Appendix “E”, Basis of Payment will be calculated by adding the initial contract period total (Table A), Option Year 1 total (Table B), Option year 2 total (Table C), Option year 3 total (Table D) and Option year 4 total (Table E). The sum of the five rows will be used to determine the financial evaluation.

4.1.3 Formulas in Pricing Schedule

If the Pricing Schedule provided to bidders include any formulae, Canada may re-input the prices provided by bidders into a fresh table, if Canada believes that the formulae may no longer be functioning properly in the version submitted by a bidder.

4.2 Basis of Selection

4.2.1 Basis of Selection - Highest Combined Rating of Technical Merit and Price

4.2.1.2 To be declared responsive, a bid must:

- a. comply with all the requirements of the bid solicitation; and
- b. meet all mandatory criteria; and

4.2.1.3 Bids not meeting (a) or (b) will be declared non-responsive.

4.2.1.4 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.

4.2.1.5 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%.

4.2.1.6 To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.

4.2.1.7 For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.

4.2.1.8 Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 70/30 ratio of technical merit and price, respectively. The total available points equal’s 135 and the lowest evaluated price is \$45,000 (45).

Basis of Selection - Highest Combined Rating of Technical Merit (70%) and Price (30%)



		Bidder 1	Bidder 2	Bidder 3
Overall Technical Score		115/135	89/135	92/135
Bid Evaluated Price		\$55,000.00	\$50,000.00	\$45,000.00
Calculations	Technical Merit Score	$115/135 \times 70 = 59.63$	$89/135 \times 70 = 46.15$	$92/135 \times 70 = 47.70$
	Pricing Score	$45/55 \times 30 = 24.55$	$45/50 \times 30 = 27.00$	$45/45 \times 30 = 30.00$
Combined rating		84.18	73.15	77.70
Overall rating		1st	3rd	2nd



PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default, if any certification made by the Bidder is found to be untrue whether during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

5.1 Certifications Required with the Bid

Bidders must submit the following duly completed certifications as part of their bid.

5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all bidders must provide with their bid, **if applicable**, the Integrity declaration form available on the [Forms for the Integrity Regime](#) website, to be given further consideration in the procurement process.

5.2 Certifications Precedent to Contract Award and Additional Information

The certifications and additional information listed below should be submitted with the bid but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame specified will render the bid non-responsive.

5.2.1 Integrity Provisions – Required Documentation

In accordance with the section titled Information to be provided when bidding, contracting or entering into a real property agreement of the [Ineligibility and Suspension Policy](#), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

5.2.2 Integrity Provisions – List of Names

In accordance with the Integrity Provisions of the Standard Instructions, all bidders must provide a completed List of Names in the Integrity Verification form available on the [Integrity Regime website](#), to be given further consideration in the procurement process.



5.2.3 Federal Contractors Program for Employment Equity – Bid Certification

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

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.



PART 6 – SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirement

There is no security associated to this requirement.



PART 7 - RESULTING CONTRACT CLAUSES

APPENDIX “A”, GENERAL TERMS AND CONDITIONS

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

A1. Standard Acquisition Clauses and Conditions Manual

All instructions, general terms, conditions and clauses identified herein by title, number and date are set out in the Standard Acquisition Clauses and Conditions (SACC) Manual issued by Public Works and Government Services Canada (PWGSC) and in the Citizenship and Immigration Canada Terms and Conditions Manual.

A1.1 An electronic version of the [SACC Manual](#) is available on the Buy and Sell Website.

A1.2 An electronic version of the Citizenship and Immigration Canada (CIC) Contract Terms and Conditions is available on the [CIC Website](#).

A2. Terms and Conditions of the Contract

A2.1 The general terms, conditions and clauses identified herein by title, number and date, are hereby incorporated by reference into and form part of this Contract, as though expressly set out herein, subject to any other express terms and conditions herein contained.

A3. General Conditions

A3.1 General Conditions [CIC-GC-001 \(2020-12-02\)](#), Med/High Complexity Goods and Services Contract shall apply to and form part of this Contract.



APPENDIX “B”, SUPPLEMENTAL TERMS AND CONDITIONS

B1. Priority of Documents

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

- a) The Articles of Agreement;
- b) Appendix “B” – Supplemental Terms and Conditions;
- c) Appendix “A” – General Terms and Conditions;
- d) Appendix “C” – Terms of Payment;
- e) Appendix “D” – Statement of Work;
- f) Appendix “E” – Basis of Payment
- g) Appendix “F” – Vendor Information and Authorization Form;
- h) the Contractor's proposal dated _____(TBD)

B2. CIC Clauses

The following Citizenship and Immigration Canada Terms and Conditions are incorporated by reference and form part of this Contract:

ID	Date	Title
CIC-SC-001(2015-02-16), Contractor Owns Intellectual Property (IP) Rights in Foreground Information		

B3. SACC Manual Clauses

The following SACC manual Clauses are incorporated by reference and form part of this Contract:

ID	Date	Title
A9117C	2007-11-30	T1204 - Direct Request by Customer Department
A9116C	2007-11-30	T1204 Information Reporting by Contractor
C0705C	2010-01-11	Discretionary Audit

B4. Security Requirement

There is no security requirement associated with the requirement.

B5. Period of Contract

The period of the Contract is from contract award to one year from contract award.

B5.1 Option to Extend the Contract

The Contractor grants Canada, the irrevocable right to extend the terms of the Contract by up to four (4) additional one (1) year periods 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 Appendix “E”, Basis of Payment.



In addition to the four (4) options of one (1) year, there are five (5) options of up to twenty five (25) licenses in each year. One option for the initial contract and four (4) options for the options of one (1) year. For a total of up to hundred (100) optional licenses.

There are also five (5) additional options of up to fifty (50) access to Twitter. One option for the initial contract and four (4) options for the options of one (1) year; For a total of up to two hundred and fifty (250) optional access to Twitter.

Canada may exercise this option at any time by sending a written notice to the Contractor at least (1) one calendar day before the Contract expiry date. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

B6. Termination on Thirty (30) Days Notice

1. Canada reserves the right to terminate the Contract at any time in whole or in part by giving thirty (30) calendar days written notice to the Contractor.
2. In the event of such termination, Canada will only pay for costs incurred for services rendered and accepted by Canada up to the date of the termination. Despite any other provision of the Contract, there will be no other costs that will be paid to the Contractor as a result of the termination.

B7. Certifications / Compliance and Additional Information

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

B8. Insurance Requirements

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

B9. Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work in Appendix "D".

B10. Authorities

B10.1 Contracting Authority

The Contracting Authority for the Contract is:

<The Contracting Authority for the Contract is to be identified at Contract award>



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.

B10.2 Project Authority

The Project Authority for the Contract is:

<The Project Authority for the Contract is to be identified at Contract award>

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.

B10.3 Technical Authority

<The Technical Authority for the Contract is to be identified at Contract award>

The Technical Authority will be responsible for providing guidance on the technical requirements and deliverables.

B10.4 Contractor's Representative

<The Contractor's Representative for the Contract is to be identified at Contract award>

B11. Limitation of Liability

B11.1 First Party Liability:

- a. The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:
 - i. any infringement of intellectual property rights to the extent the Contractor breaches the section of the general conditions entitled "Intellectual Property Infringement and Royalties";
 - ii. physical injury, including death.
- b. The Contractor is liable for all direct damages caused by the Contractor's performance or failure to perform the Contract affecting real or tangible personal property owned, possessed, or occupied by Canada.
- c. Each of the Parties is liable for all direct damages resulting from its breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of its unauthorized disclosure of the



other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.

- d. The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (a) above.
- e. The Contractor is also liable for any other direct damages to Canada caused by the Contractor's performance or failure to perform the Contract that relate to:
 - i. any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including Applicable Taxes) for the goods and services affected by the breach of warranty; and
 - ii. any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (ii) of the greater of _____ times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the block titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$_____. *(Insert the amount from the appropriate commodity grouping.)*

In any case, the total liability of the Contractor under paragraph (e) will not exceed the total estimated cost (as defined above) for the Contract or \$_____, *(insert the dollar amount entered in subparagraph (ii))*, whichever is more.

- f. If Canada's records or data are harmed as a result of the Contractor's negligence or willful act, the Contractor's only liability is, at the Contractor's own expense, to restore Canada's records and data using the most recent back-up kept by Canada. Canada is responsible for maintaining an adequate back-up of its records and data.

B11.2 Third Party Claims:

- a. Regardless of whether a third party makes its claim against Canada or the Contractor, each Party agrees that it is liable for any damages that it causes to any third party in connection with the Contract as set out in a settlement agreement or as finally determined by a court of competent jurisdiction, where the court determines that the Parties are jointly and severally liable or that one Party is solely and directly liable to the third party. The amount of the liability will be the amount set out in the settlement agreement or determined by the court to have been the Party's portion of the damages to the third party. No settlement agreement is binding on a Party unless its authorized representative has approved the agreement in writing.
- b. If Canada is required, as a result of joint and several liability, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite paragraph (a), with respect to special, indirect, and consequential damages of third parties covered by this section, the Contractor is only liable for reimbursing



Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of a third party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.

- c. The Parties are only liable to one another for damages to third parties to the extent described in this paragraph 3.



APPENDIX “C”, TERMS OF PAYMENT

C1. Basis of Payment

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm unit price for each license, as specified in Annex “E” Basis of Payment “for a cost of \$_____ each (insert the amount at contract award). 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 approved, in writing, by the Contracting Authority before their incorporation into the Work.

C2. Limitation of Expenditure

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work, as determined in accordance with the Basis of Payment in Appendix “E”, to a limitation of expenditure of \$_____ (*insert the amount at contract award*). Customs duties are included and applicable taxes are extra.

1. Canada's total liability to the Contractor under the Contract must not exceed \$ _____. Customs duties are included and applicable taxes are extra, if applicable.
2. No increase in the total liability of Canada or in the price of the Work 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 approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. 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 contract funds provided are inadequate for the completion of the Work,
whichever comes first.
3. If the notification is 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.

C3. Method of Payment

Canada will pay the Contractor in advance for the Work 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.



C4. Applicable Taxes

Applicable taxes are not included in the amounts shown in the Basis of Payment. Applicable taxes, which are estimated at \$_____ (to be determined at contract award), are included in the total contract amount. Applicable taxes are to be shown as separate items on all invoices and claims for progress payments and will be paid by Canada. The Contractor agrees to remit to appropriate tax authorities any amounts of Applicable Taxes paid or due.

C5. Invoicing Instructions

1. 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) The number of licenses delivered for the platform.
2. Invoices must be distributed as follows:
 - a) The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.

C6. Travel and Living Expenses

"Canada will not accept any travel and living expenses for:

- a) Work performed within the National Capital Region (NCR). The NCR is defined in the [National Capital Act](#), R.S.C. 1985, c. N-4, S.2.;
- b) Any travel between the Contractor's place of business and the NCR; and
- c) Any relocation of resources required to satisfy the terms of the Contract.



APPENDIX “D”, STATEMENT OF WORK

1.0 TITLE

Helpdesk Service Tool

2.0 OBJECTIVE

The Department of Immigration, Refugees and Citizenship Canada (IRCC) has a requirement for a commercial off-the-shelf (COTS) solution for a Helpdesk Tool that will enable IRCC users to effectively and efficiently manage IRCC’s interactions with the public via its official social media channels.

3.0 BACKGROUND

Immigration, Refugees and Citizenship Canada employs over 11,000 people at locations across Canada and abroad. The Department develops and manages policies and programs related to Canada’s immigration, refugees, citizenship, integration and passport programs.

IRCC manages several official social media accounts, and regularly interacts with stakeholders (clients, prospective applicants, representatives, Canadians, etc.) on these social media channels. The Department’s Social Media team responds to over 1,000 questions from IRCC clients on a weekly basis via social media and is seeking to expand on the extent of the client service it offers.

4.0 SCOPE OF WORK

The solution will consist of licenses, standard upgrades and fixes to the solution as they become available, and the provision of technical support to IRCC users.

The solution will be implemented in English and French to an initial batch of 25 users across IRCC’s branches in National Headquarters (NHQ). In subsequent years, hundreds of users in IRCC NHQ may be using the Helpdesk.

Note that new requirements to the technical environment and security requirements may apply in the future, if the use of the tool extends long term and the scope of IRCC’s solution is located on servers located inside of Canada.

The solution must at a minimum possess requirements as stated in the Mandatory Requirements.

5.0 REQUIREMENTS

5.1 Software requirements:

SOFTWARE AVAILABILITY

- The latest commercial release of the solution must be available by the contract award date.



TECHNICAL ENVIRONMENT

- The Solution and all stored data must be online and hosted on the Contractor's secure servers.
- The Solution must provide for real-time security monitoring and notifications to IRCC for security events.
- The Solution must permit auditing for selected user and administrative actions.
- The Solution must be compliant with the version of Windows Internet Explorer 11 in use at IRCC - Support only TLS 1.1 and greater – 256-AES cipher as well as future versions of Internet Explorer and other internet browsers (e.g. Firefox, Chrome).
- The Solution must use data information to and from (interoperate) with Microsoft Outlook 2007 (12.0.6680.5000) service pack 3 and compatible with future versions of Microsoft Outlook.
- The Solution must allow use of files with the following formats for client interactions: jpg, pdf, gif.
- The Solution must allow use of files with the following formats for uploading or downloading of data: xlsx, xls, rtf.
- The Solution must accommodate up to 200 concurrent licence users, should IRCC wish to expand the use of the tool.
- The Solution must have open API affordances and communicate with Chatbot (Artificial Intelligence).
- The Solution must have access to Facebook, enabling the ability to respond to Facebook comments on posts and messages on Facebook Messenger.
- The Solution must have access to WhatsApp, enabling the ability to respond to messages received via WhatsApp.
- The Solution should have access to Twitter API, enabling the ability to respond to Twitter Direct Messages (DMs) and Twitter mentions

SYSTEM ADMINISTRATION

- The Solution must include secure password authentication.
- The Solution must host the latest version software, as long as it's compatible with other mandatory requirements.
- The Solution must allow the client (IRCC) to retain an older version if a newer one is not compatible.
- The Solution must permit IRCC Account Administrators to assign access rights to an individual staff member or group.
- The Solution must not allow operations to be performed within the Solution unless the user is authorized for the operation concerned.
- The Solution must provide the ability to control various types of user access rights capability:
 - Read: client interactions; metadata (tags, notes, timestamps, conversation history, Helpdesk user data, data/metrics, etc.)
 - Write: client interactions (draft responses, approve responses and post responses); metadata (tags, notes, etc.)
 - Manage: right to manage tags (add, create, delete), right to assign tickets to other users for approval, right to export conversations to external documents
 - Generate reports



- Export data
 - Right to perform system administrator tasks.
- The Solution must permit IRCC Account Administrators to create and manage all staff member information that IRCC deems required for the establishment and maintenance of user accounts.
- The Solution must allow IRCC users to be organized and managed into groups if needed.
- The Solution must allow or be configured to allow IRCC Account Administrators to manage the structured keywords or tags that users may associate with records for easy identification, permitting Account Administrators to create, delete/archive, and rename keywords or tags.

BUSINESS FUNCTIONALITY

- The solution must include or can be configured to include, standard fields for social media interactions:
 - Social media username (e.g. Twitter handle)
 - Channel of interaction (e.g. Twitter, Facebook) including the ability to create different groups within any of the channels
 - Ability to divide between groups across different channels
 - Conversation history between the social media user and IRCC
 - Ability to split comments and create a new ticket.
 - Metadata associated with the conversation history (e.g. tags, notes, timestamps, Helpdesk users engaged, interaction status, etc.); and
 - Public profile information, as provided by the social media user.
- The Solution must be able to receive triaged tickets from a Chatbot.
- The Solution must allow to tag and untag assignments, and data must be filterable and exported by these tags.
- The Solution must include an internal notes function that users can post against a record.
- The Solution must allow users to edit, create and associate at least 50 tags to each record.
- The Solution must be able to automatically re-assign enquiries from returning clients to the same Helpdesk user.
- The Solution must be able to communicate with email (e.g. Outlook) for customizable ticketing updates depending on account administrators preferences:
 - Send reminder that a ticket has been opened for longer than service standard or for any other specified reason by agent;
 - Send email when a new ticket has been automatically assigned or triaged from Chatbot; and
 - Send email when there are technical difficulties or system issues to all users with access to solution.
- The Solution must include real-time information on the time a ticket has been opened (i.e. assigned but not resolved by IRCC users).
- The Solution must maintain a database of all client engagements and transactions.
- The Solution must be compatible with Social Media Publishing Platforms.
- The Solution must allow the display of .jpgs
- The solution must allow for the creation of 'rules' in order to perform a series of actions or tasks on tickets that fulfill specific requirements and scenarios



- The solution must be able to communicate with agents using the following notification functions:
 - Email notifications
 - Mutable desktop notifications
- The solution must allow users to filter tickets by channels and tags
- The solution must be configured to allow users to manage and label spam or unsolicited messages
- The solution must allow users to associate tag(s) with a line of business
- For public comments and tweets the solution must link directly to the source on the native platform.
- The solution must contain functionality for linking and tracking tickets into trackers or categories
 - These trackers must be nameable, and must aggregate all tracked tickets in one place
- The solution must provide a 'history' for each ticket, tracking responses, notes, and other updates.
- The solution must display email correspondences in the ticket history and in the native email platform (e.g. Outlook)
- The solution must be able to update multiple ticket fields at once (e.g. bulk update)
- The solution must be able to order tickets by the following:
 - Date created
 - Last modified
 - And both must be sortable both ascending and descending
- The solution must allow filtering of all tickets based on:
 - Channel
 - Creation date(s)
 - Status
 - Priority
 - Tags
 - Groups
 - Contacts
- The solution must allow tickets to be reassigned to agents or channels natively
- When a ticket is created or updated, the tool must be able to automatically add a tag to it, based on various properties of the ticket including but not limited to:
 - Notes
 - Replies added with specific key words

SEARCH

- The Solution must allow users to perform searches using fields such as:
 - Customizable date and date range
 - Limiting keyword and tag searches to specific time frames
 - Filters that show tickets by last modified, date created, ascending and descending
 - Type
 - Status
 - Social channels (Facebook and Twitter) and groups (within Facebook and Twitter)
 - Keywords and/or tags that can be stacked/excluded
 - Sentence / phrase



- Social media username
- Helpdesk user
- Filtering tickets by assigned agent who closed the ticket
- Filtering tickets by assigned agent who sent response
- Line of business tag groups, and sub-groups
- The Solution's search function must allow users to search using full or truncated keywords or terms.
- The Solution must maintain a searchable database of all client engagements and transactions.

USER INTERFACE

- The Solution must provide a web-based user interface.
- Helpdesk users must have the ability to view the following:
 - Open assignments:
 - List of all open tickets (i.e. unresolved client interactions)
 - Time elapsed for open tickets
 - Full interaction history and metadata (tags, notes, timestamps, etc.) for open tickets
 - Filterable by fields such as: Helpdesk user, ticket status, timeframe, platform, tag, etc.
 - All assignments:
 - Filterable through search, based on keywords, tags, notes, social media username, etc.
 - Filterable by fields such as: Helpdesk user, ticket status, timeframe, platform, tag, etc.
 - Filterable by social network, message type, assignment options (to, by, resolved by), etc.
- The Solution must permit the use of the complete English and French language character sets.
- The Solution must be screen reader friendly using assistive technologies such as screen magnifiers, text to speech and sound icons.
- The Solution must allow the Client to work in the official language of their choice: English and French (including viewing all screens, collecting responses and accessing technical support).

REPORTS

- The Solution must allow users the ability to customize, generate, and download reports so that they can be run from within the system within a specific date range:
 - Assignments with specific tag(s)
 - Assignments resolved per individual
 - Assignments created per 'group'
 - Assignments resolved per 'group'
 - Pickup/handling time per individual, team and/or with specific tags within a specific date range
 - Average resolution time/ratio per individual, team and/or with specific tags within a specific date range
 - Inbound message topics (based on social media user metadata)
 - Timeframe



- Key words
- Aggregate vs. individual data

The Solution must be able to generate and store both standardized and ad hoc reports.

- The Solution must allow users to generate reports based on the previous 180 days (minimum) of data/transactions.
- The Solution must allow, or can be configured to allow users to export reports at a minimum in xls, pdf and doc.

5.2 Documentation, training, support services:

DOCUMENTATION

- The Contractor must provide user manuals in both official languages. Where only one language currently exists, texts can be provided to the Client by the Contractor, resulting in the Client conducting in-house translations.

TRAINING

- The Contractor must provide up to three user training sessions for the Client (per contract year), at the request of the Client.
- The Contractor must provide up to 6 hours of training for System Administrators, End Users and Technical Support resources, as required by the Client. Training can be provided on-site or remotely via internet meeting.

SUPPORT SERVICES

- The Contractor must have a dedicated account representative and provide web-based customer support; online tracking of customer support requests which identifies the problem, date created and response; and ability to view status of customer support requests.
- The Contractor must provide technical support 5 days a week via telephone or e-mail from Monday to Friday during standard business hours.
- Technical support must have a guaranteed response time within 1 business day of requesting help during standard business hours.
- The Contractor must provide a 48 hour notice of a planned outage and within 1 hour of any unplanned outages.
- The Solution must be online and functional 99% of the time.

6.0 DELIVERABLES

Activity/Deliverable	Associated Schedule	Format
Launch Meeting	Within 48 hours of contract award	In-person or by teleconference/web conference
Account setup	Within 48 hours of contract award.	Online (via the solution)
User Guides: <ul style="list-style-type: none"> ▪ Administrator Manual 	Within one month of contract award	Online (via the solution)



▪ User Manual		
Ongoing support	5 days a week Monday to Friday during standard business hours	Online (via the solution or email)

7.0 MEETINGS

The Contractor will be required to attend meetings in person or by teleconference/web conference with the project team as required, including conducting training sessions.

8.0 TRAVEL

Canada will not pay for travel or living expenses associated with performing the Work. Travel expenses, if any, will be the sole responsibility of the Contractor.

9.0 CONSTRAINTS

The Contractor will not be able to begin the technical implementation of the solution until the IT Privacy Impact Assessment and Security Assessment and Authorization (SA&A) are completed by Canada.

10.0 CLIENT SUPPORT

IRCC will provide the following as required for the completion of the work under the Contract:

- Telephone or web-based remote access to the IRCC Project Authority and/or IRCC’s personnel as required for off-site Service delivery and meetings for the successful provision of the solution;
- Access to relevant documentation and reference materials to which the Contractor would not otherwise have access, based on the need to know principle;
- Review of reports/submissions, as required, and the provision of comments/suggested revisions, in a timely manner;
- Coordination of activities and responses from the areas within IRCC to enable the Contractor to provide Services, as these relate to issues identified by the Contractor;
- Communication with the Contractor and/or other IRCC stakeholders of IRCC Contract roles and responsibilities and internal work processes within IRCC;
- Negotiation and establishment of any Changes in scope, work or fees that result in an adjustment to the Contract in conjunction with the Contracting Authority;
- Provision of all necessary data to support transition to the solution;
- Appoint an Auditor for the purposes of determining compliance with the terms and conditions of the contract between the IRCC Project Authority and the Contractor;
- Provision of guidance to the Contractor, where possible and upon request, with respect to the Contractor's obligations in relation to the privacy legislation, regulations, and policies of Canada; and,
- Other assistance and support as appropriate.



11.0 Diversity

IRCC is committed to making our Department more inclusive for everyone and fostering an equitable workplace culture that values diversity and creates an environment that is welcoming and rewarding for all. We encourage the businesses that work with us to reflect these values.

More information can be found at:

<https://www.canada.ca/en/government/publicservice/wellness-inclusion-diversity-public-service/diversity-inclusion-public-service2.html>



APPENDIX “E”, BASIS OF PAYMENT

During the period of the contract, the Contractor will be paid as specified below, for Work performed in accordance with the Contract.

All deliverables are F.O.B. Destination, and Canadian Customs Duty included and applicable taxes are extra.

For bid evaluation and contractor(s) selection purposes only, the evaluated price of a bid will be determined in accordance with this Basis of Payment, Appendix “E”.

Canada's total liability to the Contractor under the Contract shall not exceed \$197,750.00, including all options, travel expenses and all applicable taxes.

Bidders must provide pricing in the format specified for each component identified in this Appendix E - Basis of Payment. Failure to provide prices in the format specified will render the proposal non-responsive.

1. The Bidder should complete this pricing schedule and include it in its financial bid. As a minimum, the Bidder must respond to this pricing schedule by inserting in its financial bid for each of the periods specified below its quoted firm all-inclusive unit price (in Cdn \$).
2. The prices or rates specified below, when quoted by the Bidder, include any of the following expenses that may need to be incurred to satisfy the terms of any contract that may result from its bid:
 - a) all travel and living expenses for work performed within the National Capital Region (NCR). The NCR is defined in the National Capital Act, R.S.C. 1985, c. N-4, S.2. The National Capital Act is available on the [Justice Website](#);
 - b) any travel expenses for travel between the Contractor's place of business and the NCR; and
 - c) any travel and living expenses for the relocation of resources to satisfy the terms of any resulting contract. These expenses cannot be charged directly and separately from the professional fees to any contract that may result from the bid solicitation.
3. The volumetric data included in the pricing schedule detailed in Appendix “E”, Basis of Payment is provided for bid evaluated price determination purposes only. They are not to be considered as a contract guarantee.



The Contractor will be paid the following all-inclusive firm per unit price per license as identified in Appendix “D” Statement of Work.

TABLE A – INITIAL CONTRACT PERIOD January 1, 2024 – December 31, 2024			
Requirement	(A) Estimated number of Licenses	(B) Firm All Inclusive unit Price per license	(C) Subtotal for Table A (C) = (A)x(B)
1 year License Login to Client Relationship Management (Helpdesk Tool), as per specifications in Appendix “D” Statement of Work. Including initial setup, email and phone support, as well as web-based training.	25	To be provided by Bidder	To be provided by Bidder
Optional - Licenses			
Requirement	(D) Estimated number of Licenses	(E) Firm All Inclusive unit Price per license	(F) Subtotal for Table A (F) = (D)x(E)
1 year License Login to Client Relationship Management (Helpdesk Tool), as per specifications in Appendix “D” Statement of Work. Including initial setup, email and phone support, as well as web-based training.	Up to 25	To be provided by Bidder	To be provided by Bidder
Optional Twitter Access			
Requirement	(G) Estimated number of Access	(H) Firm All Inclusive unit Price per access	(I) Subtotal for Table A (I) = (G)x(H)
For each license: Access to Twitter API, enabling the ability to respond to Twitter Direct Messages (DMs) and Twitter mentions.	Up to 50	To be provided by Bidder	To be provided by Bidder
TOTAL for TABLE A – initial contract period (Sum of C + F + I)			To be provided by Bidder



TABLE B – OPTION 1			
January 1, 2025 – December 31, 2025			
Requirement	(A) Estimated number of Licenses	(B) Firm All Inclusive unit Price per license	(C) Subtotal for Table A (C) = (A)x(B)
1 year License Login to Client Relationship Management (Helpdesk Tool), as per specifications in Appendix “D” Statement of Work. Including initial setup, email and phone support, as well as web-based training.	25	To be provided by Bidder	To be provided by Bidder
Optional - Licenses			
Requirement	(D) Estimated number of Licenses	(E) Firm All Inclusive unit Price per license	(F) Subtotal for Table A (F) = (D)x(E)
1 year License Login to Client Relationship Management (Helpdesk Tool), as per specifications in Appendix “D” Statement of Work. Including initial setup, email and phone support, as well as web-based training.	Up to 25	To be provided by Bidder	To be provided by Bidder
Optional Twitter Access			
Requirement	(G) Estimated number of Access	(H) Firm All Inclusive unit Price per access	(I) Subtotal for Table A (I) = (G)x(H)
For each license: Access to Twitter API, enabling the ability to respond to Twitter Direct Messages (DMs) and Twitter mentions.	Up to 50	To be provided by Bidder	To be provided by Bidder
TOTAL for TABLE B – Option 1 (Sum of C + F + I)			To be provided by Bidder



TABLE C – OPTION 2			
January 1, 2026 – December 31, 2026			
Requirement	(A) Estimated number of Licenses	(B) Firm All Inclusive unit Price per license	(C) Subtotal for Table A (C) = (A)x(B)
1 year License Login to Client Relationship Management (Helpdesk Tool), as per specifications in Appendix “D” Statement of Work. Including initial setup, email and phone support, as well as web-based training.	25	To be provided by Bidder	To be provided by Bidder
Optional - Licenses			
Requirement	(D) Estimated number of Licenses	(E) Firm All Inclusive unit Price per license	(F) Subtotal for Table A (F) = (D)x(E)
1 year License Login to Client Relationship Management (Helpdesk Tool), as per specifications in Appendix “D” Statement of Work. Including initial setup, email and phone support, as well as web-based training.	Up to 25	To be provided by Bidder	To be provided by Bidder
Optional Twitter Access			
Requirement	(G) Estimated number of Access	(H) Firm All Inclusive unit Price per access	(I) Subtotal for Table A (I) = (G)x(H)
For each license: Access to Twitter API, enabling the ability to respond to Twitter Direct Messages (DMs) and Twitter mentions.	Up to 50	To be provided by Bidder	To be provided by Bidder
TOTAL for TABLE C – Option 2 (Sum of C + F + I)			To be provided by Bidder



TABLE D – OPTION 3			
January 1, 2027 – December 31, 2027			
Requirement	(A) Estimated number of Licenses	(B) Firm All Inclusive unit Price per license	(C) Subtotal for Table A (C) = (A)x(B)
1 year License Login to Client Relationship Management (Helpdesk Tool), as per specifications in Appendix “D” Statement of Work. Including initial setup, email and phone support, as well as web-based training.	25	To be provided by Bidder	To be provided by Bidder
Optional - Licenses			
Requirement	(D) Estimated number of Licenses	(E) Firm All Inclusive unit Price per license	(F) Subtotal for Table A (F) = (D)x(E)
1 year License Login to Client Relationship Management (Helpdesk Tool), as per specifications in Appendix “D” Statement of Work. Including initial setup, email and phone support, as well as web-based training.	Up to 25	To be provided by Bidder	To be provided by Bidder
Optional Twitter Access			
Requirement	(G) Estimated number of Access	(H) Firm All Inclusive unit Price per access	(I) Subtotal for Table A (I) = (G)x(H)
For each license: Access to Twitter API, enabling the ability to respond to Twitter Direct Messages (DMs) and Twitter mentions.	Up to 50	To be provided by Bidder	To be provided by Bidder
TOTAL for TABLE D – Option 3 (Sum of C + F + I)			To be provided by Bidder



TABLE E – OPTION 4			
January 1, 2028 – December 31, 2028			
Requirement	(A) Estimated number of Licenses	(B) Firm All Inclusive unit Price per license	(C) Subtotal for Table A (C) = (A)x(B)
1 year License Login to Client Relationship Management (Helpdesk Tool), as per specifications in Appendix “D” Statement of Work. Including initial setup, email and phone support, as well as web-based training.	25	To be provided by Bidder	To be provided by Bidder
Optional - Licenses			
Requirement	(D) Estimated number of Licenses	(E) Firm All Inclusive unit Price per license	(F) Subtotal for Table A (F) = (D)x(E)
1 year License Login to Client Relationship Management (Helpdesk Tool), as per specifications in Appendix “D” Statement of Work. Including initial setup, email and phone support, as well as web-based training.	Up to 25	To be provided by Bidder	To be provided by Bidder
Optional Twitter Access			
Requirement	(G) Estimated number of Access	(H) Firm All Inclusive unit Price per access	(I) Subtotal for Table A (I) = (G)x(H)
For each license: Access to Twitter API, enabling the ability to respond to Twitter Direct Messages (DMs) and Twitter mentions.	Up to 50	To be provided by Bidder	To be provided by Bidder
TOTAL for TABLE E – Option 4 (Sum of C + F + I)			To be provided by Bidder



TOTAL EVALUATED PRICE Table:

TABLE A – TOTAL (excluding taxes)	To be provided by Bidder
TABLE B – TOTAL (excluding taxes)	To be provided by Bidder
TABLE C – TOTAL (excluding taxes)	To be provided by Bidder
TABLE D – TOTAL (excluding taxes)	To be provided by Bidder
TABLE E – TOTAL (excluding taxes)	To be provided by Bidder
TOTAL EVALUATED PRICE = SUM OF TABLE A + TABLE B + TABLE C + TABLE D + TABLE E (excluding taxes)	To be provided by Bidder



APPENDIX "F", VENDOR INFORMATION AND AUTHORIZATION FORM

Vendor Name and Address

Legal Status (incorporated, registered, etc.)

- Individual (Sole proprietor)
- Privately owned corporation
- Joint Venture or Corporate entity
- Other (specify):

GST or HST Registration Number and Business Number (Revenue Canada)\

Name and Title of Person authorized to sign on behalf of Vendor

Print Name _____ Title _____

Signature _____ Date _____

Central Point of Contact

The Vendor has designated the following individual as a central point of contact for all matters pertaining to the proposed contract, including the provision of all information that may be requested:

Name and Title _____

Telephone _____ Fax _____

Email _____

Each proposal must include a copy of this page properly completed and signed.