Public Works and Government Services Canada

Travaux publics et Services gouvernementaux Canada

LETTER OF INTEREST
LETTRE D'INTÉRÊT

Title - Sujet
"HRP-RGP' ITQ - HR and Pay Next Generation

Solicitation No. - N° de l'invitation	Date
24062-190560/B	2018-10-01

Client Reference No. - N° de référence du client	GETS Ref. No. - N° de réf. de SEAG
24062-190560	24062-190560

File No. - N° de dossier	CCC No./N° CCC - FMS No./N° VME
682xe.24062-190560	

Solicitation Closes - L'invitation prend fin	Time Zone Fuseau horaire
at - à **02:00 PM** on - le 2018-11-13	Eastern Standard Time EST

F.O.B. - F.A.B.

Plant-Usine: ☐   **Destination:** ☐   **Other-Autre:** ☐

Address Enquiries to: - Adresser toutes questions à:	Buyer Id - Id de l'acheteur
Pelchat, Marco	682xe

Telephone No. - N° de téléphone	FAX No. - N° de FAX
(819) 665-7128 ( )	( ) -

Destination - of Goods, Services, and Construction:
Destination - des biens, services et construction:

Treasury Board of Canada Secretariat
90 Elgin
Ottawa, ON
K1A0R5

Comments - Commentaires

Instructions: See Herein

Instructions: Voir aux présentes

Vendor/Firm Name and Address
Raison sociale et adresse du fournisseur/de l'entrepreneur

Delivery Required - Livraison exigée	Delivery Offered - Livraison proposée
See Herein	

Vendor/Firm Name and Address
Raison sociale et adresse du fournisseur/de l'entrepreneur

Telephone No. - N°de téléphone
Facsimile No. - N° de télécopieur

Name and title of person authorized to sign on behalf of Vendor/Firm (type or print)
Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)

Signature   **Date**

Canada

Invitation to Qualify
(ITQ)

for the
HR and Pay Next Generation Solution

ITQ - Gate 1

ITQ No. 24062-190560

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Invitation to Qualify
for the Procurement Process for
HR and Pay Next Generation Solution
ITQ No. 24062-190560

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Invitation to Qualify
for the Procurement Process for
HR and Pay Next Generation Solution

1. General Information

1.1 Introduction

a) **Phase 2 of Procurement Process**: This Invitation to Qualify (ITQ) is the second phase of a multi-phase agile procurement process by Public Works and Government Services Canada (PWGSC), on behalf of the Treasury Board Secretariat of Canada (TBS), for the HR and Pay Next Generation Solution, (the "**Project**"). Suppliers are invited to pre-qualify in accordance with the terms and conditions of this ITQ in order to become "**Qualified Respondents**" for any later phases of the procurement process. Only Qualified Respondents will be permitted to bid on any subsequent solicitation issued as part of the procurement process.

b) The anticipated multi-phase agile procurement process:
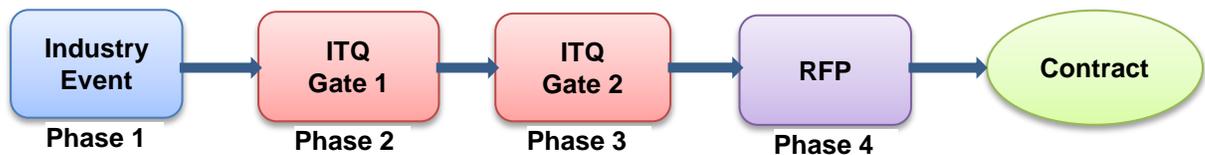
c) **Further Evaluation of Qualified Respondents**: Even though certain suppliers may be pre-qualified by Canada as a result of this ITQ, Canada reserves the right to re-evaluate any aspect of the qualification of any Qualified Respondent at any time during the procurement process.

1.2 Overview of the Project

a) **Overview of Project**: In February 2016, the Government of Canada implemented a new federal public servant pay system, called Phoenix. The roll-out of Phoenix did not go well and has resulted in a federal public service pay crisis. Since then, the on-going difficulties with the implementation and stabilization of Phoenix triggered a decision, as documented in Budget 2018, to begin investigating the development of the next generation human resources and pay system solution, one that is better aligned with the complexity of the federal government pay structure.

This process will use an agile procurement approach in order to promote collaboration between the federal government, industry, unions, public servants and technology providers, as they work together to find a solution. As they move through the agile procurement process these stakeholder groups will be contributing to the solution, testing the requirements, refining them, and after several iterations, finalizing the details of the solution.

b) **Scope of Anticipated Procurement:**

i) **Potential Client Users**: This ITQ is being issued by PWGSC. It is intended that the contract(s) resulting from any subsequent solicitation would be used by PWGSC to

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provide shared services to one or more of its clients. PWGSC's clients include PWGSC itself, those government institutions for whom PWGSC's services are mandatory at any point during the life of any resulting instrument(s), and those other organizations for whom PWGSC's services are optional at any point during the life of any resulting instrument(s) and that choose to use those services from time to time. This process will not preclude PWGSC from using another method of supply for any of its clients with the same or similar needs, unless a subsequent solicitation for this Project expressly indicates otherwise.

ii) **Number of contracts**: PWGSC is currently contemplating the award of at least 1 contract.

iii) **Term of contract**: PWGSC will identify the term of any resulting contract and any options associated, once the procurement progresses to the RFP phase.

c) **Applicable Trade Agreements**: The following trade agreements apply to this procurement process:

Trade Agreements	Yes/No
Canadian Free Trade Agreement (CFTA)	YES
North American Free Trade Agreement (NAFTA)	YES
World Trade Organization Agreement on Government Procurement (WTO-AGP)	YES

1.3 Overview of Anticipated Procurement Process

This ITQ is the second phase in the procurement process for the Project. Although the procurement process remains subject to change (and even to cancellation, in accordance with PWGSC's Standard Instructions), Canada currently anticipates that the procurement process will be conducted in the following phases:

a) **Industry Engagement (Phase 1)**: PWGSC commenced its industry engagement by releasing an NPP on August 24, 2018 and then followed it up by holding an Industry Event on September 19, 2018. The objective of the Industry Day was to obtain feedback from Industry on Canada's preliminary requirements for the Project.

b) **ITQ Gate 1 (Phase 2)**: This ITQ will be used to qualify Respondents to participate in the subsequent ITQ Gate 2 and any subsequent phases of the procurement process.

c) **ITQ Gate 2 (Phase 3)**: This ITQ will be used to qualify Respondents to participate in the subsequent RFP phase of the procurement process.

d) **Request for Proposals (RFP) (Phase 4)**: Canada anticipates releasing an RFP to those Qualified Respondents who remain qualified at the time the RFP is released.

1.4 Conflict of Interest or Unfair Advantage

As set out in the provisions of the Standard Instructions - Goods or Services - Competitive Requirements 2003 (*2018-05-22*), a response can be rejected due to an actual or apparent conflict of interest or unfair advantage.

In this regard, Canada advises that it has used the services of a number of private sector consultants/contractors in preparing strategies and documentation related to this procurement process, including the following:

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a)   Pleiad Canada Inc.

1.5 Fairness Monitor

Canada has engaged Samson & Associates as a fairness monitor for this procurement. The fairness monitor will, for example, observe the evaluation of responses to determine whether PWGSC has adhered to the evaluation process described in the solicitation. The fairness monitor is under obligations pursuant to its contract with Canada to maintain the confidentiality of all information received as a result of its participation in this procurement process.

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2. Instructions for Respondents

2.1 Standard Instructions, Clauses and Conditions

a) All instructions, clauses and conditions identified in the ITQ by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual, (https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) issued by Public Works and Government Services Canada.

b) Firms who submit a response agree to be bound by the instructions, clauses and conditions of the ITQ.

c) The 2003 (*2018-05-22*) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the ITQ, except that:

    i) Wherever the term "bid solicitation" is used, substitute "Invitation to Qualify";

    ii) Wherever the term "bid" is used, substitute "Response";

    iii) Wherever the term "Bidder(s)" is used, substitute "Respondent(s)";

d) Subsection 05(4), which discusses a validity period, does not apply, given that this ITQ invites firms to qualify. Canada will assume that all firms who submit a Response wish to continue to qualify unless they advise the Contracting Authority that they wish to withdraw their Response;

e) Delete subsection 01 – Integrity Provisions – Bid; and

f) Delete subsection 20 – Further Information.

g) By submitting a response, the Respondent is confirming that it agrees to be bound by all the instructions, clauses and conditions of the ITQ.

2.2 Questions and Comments

Questions and comments about this ITQ can be submitted in accordance with provisions of the Standard Instructions - Goods or Services - Competitive Requirements 2003 (*2018-05-22*), no later than 10 calendar days prior to the closing date.

2.3 Submission of Only One Response

a) A Respondent can be an individual, a sole proprietorship, a corporation, a partnership, or a joint venture.

b) Each Respondent (including related entities) will be permitted to qualify only once. If a Respondent or any related entities participate in more than one response (participating means being part of the Respondent, not being a subcontractor), Canada will provide those Respondents with 2 working days to identify the single response to be considered by Canada. Failure to meet this deadline may result in all the affected responses being disqualified or in Canada choosing, in its discretion, which of the responses to evaluate.

c) For the purposes of this Article, regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law (whether that entity is an individual, corporation, partnership, etc.) an entity will be considered to be "related" to a Respondent if:

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i) they are the same legal entity as the Respondent (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);

ii) the entity and the Respondent are "related persons" or "affiliated persons" according to the Canada *Income Tax Act*;

iii) the entity and the Respondent have now or in the two years before the ITQ closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or

iv) the entity and the Respondent otherwise do not deal with one another at arm's length, or each of them does not deal at arm's length with the same third party.

d) A Respondent may act as a subcontractor to another Respondent. However, subcontractors may not be permitted to participate in the Review and Refine Requirements phase with the Qualified Respondent for whom they will be doing subcontracting work.

e) Any individual, sole proprietorship, corporation, or partnership that is a Respondent as part of a joint venture cannot submit another response on its own or as part of another joint venture.

Example 1: Supplier A does not itself have all the experience required by the ITQ. However, Supplier B has the experience that Supplier A lacks. If Supplier A and Supplier B decide to team up to submit a response together as a joint venture, both entities are together considered the Respondent. Neither Supplier A nor Supplier B can team up with another supplier to submit a separate response, because each is already part of a Respondent.

Example 2: Supplier X is a Respondent. Supplier X's subsidiary, Supplier Y, decides to team up with Supplier Z to submit a response as a joint venture. Suppliers Y and Z, as well as Supplier X, will all be asked to determine which one of the two responses will be considered by Canada. Both responses cannot be submitted, because Supplier Y is related to Supplier X as an affiliate.

f) By submitting a response, the Respondent is certifying that it does not consider itself to be related to any other Respondent.

2.4 Security Clearance Requirement

a) A Respondent is not required to have security clearance in order to become a Qualified Respondent. Security clearance and other security requirements will be identified at a later stage of the procurement process.

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3.   Preparing and Submitting a Response

3.1   General Instructions

a)   Responses must be submitted only to the Public Works and Government Services Canada (PWGSC) Bid Receiving Unit specified below by the date and time indicated on page 1 of this ITQ.

b)   Due to the nature of the bid solicitation, responses transmitted by facsimile to PWGSC will not be accepted.

c)   If there is a discrepancy between the wording of an electronic copy and a hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

d)   If the Bidder chooses to submit its bid electronically, Canada requests that the Bidder submits its bid in accordance with section 08 of the 2003 Standard Instructions. Bidders must provide their bid in a single transmission. The epost Connect service has the capacity to receive multiple documents, up to 1GB per individual attachment.

3.2   Language for Future Communications

Each Respondent is requested to identify, in its Response Submission Form, which of Canada's two official languages it chooses to use for future communications with Canada regarding this ITQ and any subsequent phases of the procurement process.

3.3   Content of Response

A complete response to this ITQ consists of all of the following:

a)   **Response Submission Form at Attachment 2 (Requested at ITQ Closing)**: Respondents are requested to include the Response Submission Form, found at **Attachment 2**, with their responses. It provides a common form in which Respondents can provide information required for evaluation, such as a contact name, the Respondent's Procurement Business Number, the language for future communications with Canada about this procurement process, etc. Using the form to provide this information is not mandatory, but it is recommended. If Canada determines that the information requested by the Response Submission Form is incomplete or requires correction, Canada will provide the Respondent with an opportunity to provide the additional information or make the correction. Providing the information when requested during the evaluation period is mandatory.

b)   **Specific Responses to the Qualification Requirements at Attachment 1 (Mandatory at ITQ Closing)**: The response must include all the information required by Gate 1 Evaluation Criteria found at **Attachment 1**. Respondents are encouraged to use the checklist found at **Attachment 4** – Mandatory Requirements & Criteria Checklist.

c)   Respondents may request to make an in-person presentation of 60 minutes to provide an overview of their bid submission response and provide any needed clarifications.

   i)   Respondents interested in performing this optional presentation to the evaluation committee must contact the procurement team at the email address below, within 10 calendar days upon the submission of their response.

   TPSGC.PAApprovisionRHalaPaye-APHRtoPAYProcurement.PWGSC@tpsgc-pwgsc.gc.ca

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ii) Respondents can use the 60 minutes how they best see fit and craft the proposed agenda accordingly.

3.4 Electronic Submission of Response

a) **Submission of Response**: This ITQ solicitation allows bidders to use the epost Connect service provided by Canada Post Corporation to transmit their bid electronically.

b) **epost Connect**

  i) Unless specified otherwise in the bid solicitation, bids may be submitted by using the epost Connect service provided by Canada Post Corporation.

   (A) PWGSC, National Capital Region: The only acceptable email address to use with epost Connect for responses to bid solicitations issued by PWGSC headquarters is: tpsgc.dgareceptiondessoumissions-abbidReceiving.pwgsc@tpsgc-pwgsc.gc.ca

      or, if applicable, the email address identified in the bid solicitation.

  ii) To submit a bid using epost Connect service, the Bidder must either:

   (A) send directly its bid only to the specified PWGSC Bid Receiving Unit, using its own licensing agreement for epost Connect provided by Canada Post Corporation; or

   (B) send as early as possible, and in any case, at least six business days prior to the solicitation closing date and time, (in order to ensure a response), an email that includes the bid solicitation number to the specified PWGSC Bid Receiving Unit requesting to open an epost Connect conversation. Requests to open an epost Connect conversation received after that time may not be answered.

  iii) If the Bidder sends an email requesting epost Connect service to the specified Bid Receiving Unit in the bid solicitation, an officer of the Bid Receiving Unit will then initiate an epost Connect conversation. The epost Connect conversation will create an email notification from Canada Post Corporation prompting the Bidder to access and action the message within the conversation. The Bidder will then be able to transmit its bid afterward at any time prior to the solicitation closing date and time.

  iv) If the Bidder is using its own licensing agreement to send its bid, the Bidder must keep the epost Connect conversation open until at least 30 business days after the solicitation closing date and time.

  v) The bid solicitation number should be identified in the epost Connect message field of all electronic transfers.

  vi) It should be noted that the use of epost Connect service requires a Canadian mailing address. Should a bidder not have a Canadian mailing address, they may use the Bid Receiving Unit address specified in the solicitation in order to register for the epost Connect service.

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vii) For bids transmitted by epost Connect service, Canada will not be responsible for any failure attributable to the transmission or receipt of the bid including, but not limited to, the following:

(A) receipt of a garbled, corrupted or incomplete bid;

(B) availability or condition of the epost Connect service;

(C) incompatibility between the sending and receiving equipment;

(D) delay in transmission or receipt of the bid;

(E) failure of the Bidder to properly identify the bid;

(F) illegibility of the bid;

(G) security of bid data; or,

(H) inability to create an electronic conversation through the epost Connect service.

viii) A bid transmitted by epost Connect service constitutes the formal bid of the Bidder and must be submitted in accordance with section 05.

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4. Process for Evaluating Responses

4.1 Evaluation of Respondent Qualifications

Canada will evaluate whether each Response satisfies all the mandatory requirements described in this ITQ (including information that this ITQ indicates is required, but the ITQ specifically states that it may be submitted upon request after the closing date). The provisions of Standard Instructions - Goods or Services - Competitive Requirements 2003 (2018-05-22) that relate to evaluation also apply. A response must comply with all the requirements of the ITQ in order to be declared compliant.

4.2 Basis of Qualification

a) Each Respondent whose response meets all the requirements of this ITQ will become a Qualified Respondent for the next phase of the procurement process.

b) Canada reserves the right to re-evaluate the qualification of any Qualified Respondent at any time during the procurement process. For example, if a particular security clearance is a requirement of this ITQ and the Respondent's security clearance changes or lapses, so that the Respondent no longer meets the requirements of this ITQ, Canada may disqualify that Qualified Respondent. Similarly, if information comes to the attention of Canada that calls into question any of the Qualified Respondent's qualifications under this ITQ, Canada may re-evaluate that Qualified Respondent. If Canada re-evaluates the qualification of any Qualified Respondent, Canada may request further information and, if the Qualified Respondent fails to provide it within 5 working days (or a longer period provided by the Contracting Authority), Canada may disqualify the Qualified Respondent.

c) Unsuccessful Respondents will not be given another opportunity to participate or be re-evaluated for the subsequent phases of the procurement process, unless Canada determines, in its sole discretion, that the circumstances require such a change.

d) Canada will provide written notice to each Respondent informing of their qualification status.

4.3 ITQ Gate 1 Second Qualification Round

a) Canada reserves the right, in its sole discretion, to conduct a second qualification round among the unsuccessful Respondents if, in Canada's opinion, the first qualification round results in an insufficient number of Qualified Respondents.

b) If Canada determines that unsuccessful Respondents will be given a second opportunity to qualify, Canada will provide written information to all unsuccessful Respondents on the same day regarding the reasons they were unsuccessful during the first qualification round.

c) Any Respondent who does not qualify as a result of any second qualification round conducted by Canada will not be given another opportunity to participate or be re-evaluated for any subsequent phases of this procurement process.

Statement of Work
(SOW)

for the
HR and Pay Next Generation Solution

ITQ-Gate 1

Invitation to Qualify
(ITQ)
No. 24062-190560

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Statement of Work

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Statement of Work
HR and Pay Next Generation Solution

1.0 Background

As outlined in Budget 2018, the Government of Canada (GC) is committing to the next steps in addressing the ongoing challenges of the Phoenix pay system, including its intention to move to a next generation solution; one that will be better aligned with the complexity of the federal government's HR and pay structure. The Phoenix issues have shown that HR and pay are mutually dependent and don't exist in isolation. The next generation solution may therefore also support the full hire-to-retire employee lifecycle, enabling the GC to better attract, pay, retain and nurture its employees. This solution may cover aspects such as: recruitment, training, performance management and other HR processes and systems, and interdependencies with pay, and any other downstream systems like pension and receiver general.

The GC is committed to exploring all options, and will be working with experts, unions, public servants, and technology providers to define the way forward. In particular, we are committed to working in partnership with our bargaining agents and system users at the center of this process. The GC will also consider the lessons learned and best practices from the implementation of large-scale initiatives from other jurisdictions.

This Statement of Work sets forth the description of the capabilities required to provide the GC with an ability to build, maintain and operate a GC Human Capital Management solution, including Pay, and provide a common approach to supporting all the capabilities required in a typical Human Capital Lifecycle, including: the assurance of interoperability; standardizing what information is shared and how it is shared; and, to ensure industry best practice processes are utilized.

This Statement of Work is applicable to Gate 1, and should be considered a work in progress that will change and be updated throughout the procurement process as described in the separate Invitation to Qualify (ITQ) document.

1.1 User Centric – Designing for Employees

It is important to highlight that any potential solution will need to be designed in a user centric manner. A key lesson learned from multiple reports and engagements was to ensure that any solutions implemented post-Phoenix be done with the user as the focal point of all decisions and designs. The days of procuring ERPs based off of dated business requirements are long past, and the era of co-designing, user-centricity, and collaborative efforts is at hand.

1.1.1 Co-Designing, User-Centricity, and Collaboration

Co-designing future solutions invites teams to bring in members of the end-user community such as employees and managers into the team and give them a seat at the table to make recommendations, and even weigh in on decisions. This inverts the traditional approach to ERP where users were the "last to know" when launching a new ERP. The traditional method kept most of the functionality as a surprise and made itself available only upon a User Acceptance Testing (UAT) or Training phases at the earliest, or, in most cases, post go-live with some lucky few getting the sneak peek of the pilot (if one occurred). Stemming from a more strategic mindset, co-designing brings in the traditional team players, such as functional and technical teams, and sits them amongst end users, policy resources, and even the vendor. The new

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"extended" family can even include resources who know applications that will integrate with the planned solution to ensure that information is considered from that point of view.

User-centered design (UCD), also referred to as User-Driven Development, is a methodology that puts the user at the forefront of design and design decisions. Playing heavily on how to make a particular product *usable* for the person it is intended for, UCD puts the human back as priority one in terms of workflows, process flows, and even in how the solution is anticipated to be used by the user vs. the more traditional approach of having the technology functions drive decisions. This, coupled with the theory of Design Thinking, where empathy is one of the key factors, once applied, will make for a solution that not only meets any business requirements, but increases the likelihood of proper use by the intended end-users.

1.2 Cloud Environment – SaaS

As stated in the GC Cloud Adoption Strategy, cloud computing can be compared to public utilities that deliver commodities such as electricity. Instead of buying and running infrastructure itself, an organization buys computing power from a provider - cloud computing is on-demand and the consumer pays for what they use.

- Cloud computing introduces a significant shift in how the GC:
  - o Will obtain, use and manage technology; and,
  - o Budget and pay for technology services
- Cloud computing benefits the GC by:
  - o Delivering modern digital services comparable to commercial service providers such as Canadian financial institutions;
  - o Providing the ability to keep pace with technological, legislative and policy changes affecting service offerings to Canadians; and,
  - o Diminishing costs to deliver programs and services, i.e. the ability to trade capital expense for variable expense - reducing requirements to maintain aging data centers and networks, and only pay predictable subscription fees for cloud computing services based on usage.

The cloud is a very broad concept, and it covers just about every possible sort of online service, but when businesses refer to cloud procurement, there are usually three models of cloud service under consideration: Infrastructure as a Service (IaaS); Solution as a Service (PaaS); and, Software as a Service (SaaS). This represents a sliding scale of increasing vendor operation and maintenance of the IT solution. As the vendor takes greater control of the operation and maintenance of the IT solution (IaaS ➲ PaaS ➲ SaaS) the benefits' return to the customer increases geometrically.

2.0 Scope

The purpose of this Statement of Work (SOW) is to define the requirements, activities and deliverables associated with Gate 1. The scope of this phase is to:

1. Release high-level requirements
2. Assess mandatory requirements
3. Refine requirements based on collaboration outcomes

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3.0 Requirement

The GC has a requirement to modernize, streamline, and transform its human resource management and pay capability. The following sections describe the initial requirements of a potential solution relevant to Gate 1.

3.1 Draft Government of Canada HCM Business Reference Model

The Draft GC HCM Business Reference Model is being used to describe the scope of business services that may require modernization.

3.1.1 HCM Business Reference Model Context

The Human Capital Management (HCM) Business Reference Model documents the high-level end-to-end business functions and business needs within the human resource function in the GC. It addresses strategic and planning requirements, and encompasses all aspects of employee lifecycle processing, as well as reporting and analytic capabilities.

This document will be incorporated into the GC Enterprise Architecture to facilitate the selection and development of appropriate solutions in the GC.

The various components of the GC HCM Business Reference Model are outlined below:

- Business Reference Model *Map*, summarizing the high-level business functions and sub-functions within the HCM Model for the GC.
- Business Reference Model Function *Definitions*, providing a description/definition of each business function and sub-function.
- HCM Business *Capabilities*, listing the business needs associated with each of the business functions and sub-functions.
- *Lexicon*, defining the terminology used to describe the capabilities and business needs. These definitions are consistent throughout the capabilities list and provide scope and intent of the capabilities.
- *Business Outcomes*, documenting the high-level business objectives for the future state against which the success of the initiative can be measured.

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3.1.2 Business Reference Model Map

Government-wide – Enterprise Level				Department/Agency – Enabling Strategic Level		Employee Lifecycle – Department/Agency Operational					Supporting Department/Agency Service Delivery		
G1 GC People Management Leadership	**G2** GC Oversight and Evaluation	**G3** GC Benefits Planning / Contract and Administration	**G4** GC Retirement	**DA1** People Management Strategy, Policies and Operational Plan	**DA10** People Management Evaluation	**DA2** Talent Acquisition	**DA3** Talent Development	**DA4** Departmental / Agency Employee Performance Management	**DA5** Compensation and Leave	**DA6** Separation	**DA7** Compliance with Workplace and Workforce Policies and Standards	**DA8** Labour Relations	**DA9** Workforce Analytics and Employee Records
G1.1 GC HR Regulation, Policies and Standards	**G2.1** People Management Strategy Oversight Evaluation Framework	**G3.1** Benefit Program Administration and Oversight	**G4.1** Pension Program Administration and Oversight	**DA1.1** People Management Operation Strategy	**DA10.1** People Management Strategic Evaluation Guidance	**DA2.1** Talent Acquisition Action Plan	**DA3.1** Talent Development Planning	**DA4.1** Employee Performance Management	**DA5.1** Compensation and Leave Management	**DA6.1** Separation Management	**DA7.1** Employee Conduct	**DA8.1** Labour Management Relations Consultation and Compliance	**DA9.1** Employee People Management Inquiry Processing
G1.2 HR Program Strategy and Tools			**G4.2** Retirement Inquiries	**DA1.2** Workforce Planning	**DA10.2** People Management and HR Operations Evaluation	**DA2.2** Applicant Sourcing and Recruitment	**DA3.2** Talent Development and Training	**DA4.2** Recognition Management	**DA5.2** Work Schedule and Leave Administration	**DA6.2** Separation Processing and Off Boarding	**DA7.2** Redress Process and Third Party Proceedings	**DA8.2** Redress Process and Third Party Proceedings	**DA9.2** Research
G1.3 HR Service Delivery Management			**G4.3** Retirement Case Processing	**DA1.3** Organization Design and Position Management		**DA2.3** Candidate Assessment and Selection	**DA3.3** Learning Administration				**DA7.3** Accommodations Management	**DA8.3** Negotiation Preparation and Support	**DA9.3** Workforce and Performance Analytics
				DA1.4 - Diversity and Inclusion		**DA2.4 - Onboarding**					**DA7.4** Conditions of Employment Monitoring		**DA9.4** Workforce and Performance Reporting
											DA7.5 Personnel Relations and Engagement		**DA9.5** Employee Records and Recordkeeping
											DA7.6 Workplace Compliance		**DA9.6** Employee Records Disclosure

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3.1.3 Government of Canada HCM Business Reference Model Listing of Key Requirements

The solution must cover the following business capabilities as per the GC HCM Business reference model: DA2, DA3, DA4, DA5, DA6. Details available in the Gate 1 Evaluation Criteria.

3.2 Policies, Procedures and Standards

The GC Digital Standards are listed below, and the GC Architectural Standards are also included for information, as they may be used for assessment as appropriate.

3.2.1 Government of Canada Digital Standards

Purpose: High-level aspirations to guide GC in digital transformation and augmented service delivery. The outputs will be tied to the digital policy. It's the WHY.

Audience: GC service providers, program areas

3.2.2 GC Architectural Standards

1. **Business Architecture**

   - **Align to the GC Business Capability Model**

     o Define program services as business capabilities to establish a common vocabulary between business, development, and operation.
     o Identify capabilities that are common to the GC enterprise and can be shared and reused.
     o Model business processes using Business Process Management Notation (BPMN) to identify common enterprise processes.

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- **Design for the Users First and Deliver with Multidisciplinary Teams**

  o Focus on the needs of users, using agile, iterative, and user-centred methods
  o Conform to both accessibility and official languages requirements
  o Include all skillsets required for delivery, including for requirements, design, development, and operations
  o Work across the entire application lifecycle, from development and testing to deployment and operations
  o Ensure quality is considered throughout the Software Development Lifecycle
  o Encourage and adopt Test Driven Development (TDD) to improve the trust between Business and IT

2. **Information Architecture**

- **Keep Data Organized**

  o Decouple Master Data from applications and host within the appropriate system of record
  o Make systems of record authoritative central sources
  o Assign data custodians to ensuring data is correct, consistent, and complete
  o Design data resiliency in accordance with GC policies and standards
  o Use Master Data Management to provide a single point of reference for appropriate stakeholders

- **Enable Interoperability**

  o Expose all functionality as services
  o Use microservices built around business capabilities. Scope each service to a single purpose
  o Run each service in its own process and have it communicate with other services through a well-defined interface, such as an HTTPS-based application programming interface (API)
  o Run applications in containers
  o Leverage the GC Digital Exchange Platform for components such as the API Store, Messaging, and the GC Service Bus

3. **Application Architecture**

- **Use Open Standards and Solutions by Default**

  o Use open source standards, solutions, components, and leading practices
  o Enforce this order of preference: open source first, then platform-agnostic COTS, then proprietary COTS, and lastly custom-built
  o Make source code open and reusable under an appropriate open source software license

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- o Expose public data to implement Open Data and Open Information initiatives

- **Maximize Reuse**

  - o Leverage and reuse existing solutions, components, and processes
  - o Select enterprise and cluster solutions over department-specific solutions
  - o Achieve simplification by minimizing duplication of components and adhering to relevant standards
  - o Inform the GC EARB about departmental investments and innovations
  - o Share code publicly when appropriate, and when not, share within the Government of Canada

4. **Technology Architecture**

- **Use Cloud First**
  - o Enforce this order of preference: Software as a Service (SaaS) first, then Platform as a Service (PaaS), and lastly Infrastructure as a Service (IaaS)
  - o Enforce this order of preference: Public cloud first, then Hybrid cloud, then Private cloud, and lastly non-cloud (on-premises) solutions
  - o Design for cloud mobility and develop an exit strategy to avoid vendor lock-in

- **Design for Performance, Availability, and Scalability**

  - o Design for resiliency
  - o Ensure response times meet user needs, and critical services are highly available
  - o Support zero-downtime deployments for planned and unplanned maintenance
  - o Use distributed architectures, assume failure will happen, handle errors gracefully, and monitor actively

5. **Security Architecture and Privacy**

- **Design for Security and Privacy**
  - o Implement security across all architectural layers
  - o Categorize data properly to determine appropriate safeguards
  - o Perform a privacy impact assessment (PIA) when personal information is involved
  - o Balance user and business needs with proportionate security measures

- **Design for Systems to be Measured and Accountable**
  - o Publish a Service Level Agreement for each service
  - o Make an audit trail available for all transactions to ensure accountability and non-repudiation
  - o Establish business and IT metrics to enable business outcomes
  - o Apply oversight and lifecycle management to digital investments through governance

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4.0 Assumptions

As per the ITQ, any proposed solution will be assessed and revised through collaboration, within each gate, according to the criteria set out in that gate. The GC intends on releasing an updated SOW prior to each gate and throughout the procurement when it is significantly revised. During later gates both implementation and sustainment options will be co-designed with successful vendors.

The NEXTGEN SOW will include the following services in order to support a multi-tenant solution. The services will be developed in increasing detail throughout each gate:

- Solution:

  Business Capabilities and Technical Capabilities are provided on a scalable, elastic, and measurable cloud environment as described below;

- Implementation:

  Will describe the methodology(s) for implementing the solution; highlight the recommended scope for the solution across the GC; describe the recommended implementation process for dealing with large, medium and small sized departments; describe the change management and transformation recommendations needed to successfully implement the solution;

- Sustainment:

  Will describe System Management and Technical support, including management and operations to support NEXTGEN as per Software as a Service design principles; and

  NEXTGEN Configuration and Asset Management for all in-scope services; and

  NEXTGEN Capacity and Performance Management; and

  NEXTGEN Solution Security; and

  In scope environments may include: (SBX) Sandbox; Development (DEV), Integration (INT), Quality Assurance (QA), Training (TRN) Performance (PER), Production (PROD)

4.1 Overall Assumptions

1. The future solution will be based on one integrated HCM application that supports both the HR and Total Compensation functions.
2. Human Capital includes all components of the GC workforce (employees, terms, casuals, contractors, etc.).
3. The future Human Capital solution will provide interoperability/integration with key GC solutions (finance, procurement, travel, etc.) and HCM applications.
4. The future Human Capital solution must provide the appropriate level of privacy and security for personnel information and solution access in order to comply with legislation and policy.
5. The new Human Capital solution must comply with GC accessibility and official languages standards.
6. Capability statements identify the business needs and are not indicative of sequencing or processing requirements.

Attachment 1

Evaluation Criteria for ITQ - Gate 1

for the
HR and Pay Next Generation Solution

Invitation to Qualify
(ITQ)
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A. NextGen HR and Pay Evaluation Criteria for ITQ Gate 1 (*Show us*)

Category	Criteria	Evaluation	Proof Required
Business Architecture	1. The bidder must demonstrate they can provide a solution for current and future HR & Pay business capabilities. 1.1. The solution must cover three out the five following business capabilities, DA2, DA3, DA4, DA5 and DA6, as per the GC HCM Business reference model of which one must be DA5. 1.2. The bidder must provide a list of planned product and solution improvements (product roadmap) for any solutions covering the capabilities in the GC HCM Business Reference Model	Pass/Fail	1. 1.1. Three single videos, up to 5 minutes, demonstrating the "solution in action" with either a French or English user interface that demonstrates three out of five business capabilities for DA2, DA3, DA4, DA5 and DA6, of which one must be DA5. Any user documentation or voice over to further explain the video is recommended. High level architectural information is also recommended to list key technical capabilities, platform type and version, module names. 1.2. Proof Required: The bidder must supply presentation(s) and-or document(s) explaining the proposed HCM Solution Roadmap(s).
	2. The bidder must own the intellectual property for the core HCM platform included in the proposed solution (excluding add-ons and extensions), in order to allow for the bidder to introduce and support product enhancements into the main commercial product to align with GC needs	Pass/Fail	2. Proof Required: The bidder must supply, in less than one page, a brief description of how they meet criteria 2.
	3. The platform owner must accept to be prime contractor for the implementation of the proposed solution, in partnership with the Government of Canada.	Pass/Fail	3. Proof Required: The bidder must supply, in less than one page, a brief description of how they meet criteria 3.
	4. The bidder must demonstrate that the proposed solution is available in both of Canada's official languages (French and English).	Pass/Fail	4. Proof Required: The bidder must supply a single video (of less than 5 minutes) demonstrating the "solution in action" with a French user interface providing one of the business capabilities as per the GC HCM Business reference model: DA2, DA3, DA4, DA5, and DA6. Any user documentation or voice over to further explain the video is recommended. High level architectural information is also recommended to list key technical capabilities, platform type and version, module names.

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	5. The bidder must demonstrate that the proposed solution meets, or will be meeting within 1 year as of time of bidding, WCAG 2.0 AA requirements.	Pass/Fail	5. Proof Required: The bidder must supply (A) Results of an accessibility assessment, approach or attestation; or (B) A plan to reach compliance within 1 year of the time of bidding.
Information & Data Architecture	6. The bidder must have the ability for the GC to store and protect its information at rest, including data in backups or maintained for redundancy purposes within the geographic boundaries of Canada, in alignment with the GC's Direction for Electronic Data Residency.	Pass/Fail	6. Proof Required: The bidder must supply, in less than one page, a brief description of how they meet criteria 6. High level architectural information is also recommended listing datacenter location(s) and other relevant information.
Application Architecture	7. The bidder must demonstrate that the proposed solution includes a library of secure bi-directional Application Programming Interfaces (API) connections that are available to external systems 7.1. The proposed solution must protect information through secure authentication methods using open standards. (Including but not limited to: Open ID or OAuth or SAML) 7.2. All APIs must be exposed via industry open standard bindings and protocols. (Including but not limited to: REST/JSON or SOAP/XML) 7.3. All APIs must be able to expose data as non-proprietary business entity or object schemas. Specifically, APIs must be able to abstract raw back-end table or data structures. 7.4. The solution API library must include the core business functionality that allows external information consumption and information provisioning for at least the compensation (including pay) business capabilities. 7.5. Please provide two customer references where your HCM solution was integrated with an SAP financial system as this is the GC approved standard for Finance/Material business capabilities.	Pass/Fail	7. 7.1. Proof Required: The bidder must supply, in less than one page, a brief description of how they meet criteria 7.1 or provide technical documentation or presentations highlighting compliance. 7.2. Proof Required: The bidder must supply, in less than one page, a brief description of how they meet criteria 7.2 or provide technical documentation or presentations highlighting compliance. 7.3. Proof Required: The bidder must supply, in less than one page, a brief description of how they meet criteria 7.3 or provide technical documentation or presentations highlighting compliance. 7.4. Proof Required: The bidder must supply, in less than one page, a brief description of how they meet criteria 7.4 or provide technical documentation or presentations highlighting compliance and supply a link to or a listing of the API library. 7.5. Proof Required: The supplier must provide two customer references and a summary of information and technology used to exchange data. Please note that GC reserves the right to validate with the client references.
Technology Architecture	8. The bidder must demonstrate that the proposed solution is offered through a Software as a Service (SaaS) model	Pass/Fail	8. 8.1. Proof Required: The bidder must supply, in less than one page, a brief description of how they meet criteria

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	8.1. The solution must be offered through a SaaS model as defined by National Institute of Standards and Technology special publication 800-145. 8.2. The solution must be offered through a SaaS model meeting the essential cloud characteristics as defined by NIST SP800-145 (https://csrc.nist.gov/publications/detail/sp/800-145/final|) including: 8.2.1.On-demand self-service 8.2.2.Broad network access 8.2.3.Resource pooling 8.2.4.Rapid elasticity 8.2.5.Measured Service		8.1 and must provide technical documentation or presentations describing standard service level agreements. Proof 8.2. Proof Required: The bidder must supply, in less than one page, a brief description of how they meet criteria 8.2 or provide technical documentation or presentations highlighting compliance. High level information is also recommended to describe high level cloud architecture.
	9. The bidder must demonstrate that the proposed solution is proven and scalable for different sizes of organizations. 9.1. The bidder must demonstrate that the proposed solution can scale to complete pay for multiple organizations or one organization within a single pay-cycle for 350,000 employees or more. 9.2. The bidder must provide references for various sizes of organizations by providing two references for each of the following: 9.2.1. Organizations of 1 – 50,000 employees clients; and 9.2.2. Organizations of 51,000 – 99,999 employees clients 9.2.3. Organizations of more than 100,000 employees clients	Pass/Fail	9. Proven and Scalable: 9.1. Proof Required: The bidder must supply 1 client reference and high-level project description that demonstrates that the proposed solution can scale to complete pay for multiple organizations or one organization within a single pay-cycle for 350,000 employees or more. Please note that GC reserves the right to validate with the client references. 9.2. Various Organizations: 9.2.1.Proof Required: The bidder must supply 2 client references and high-level project descriptions for Small (1 – 99,999 employees) clients. Please note that GC reserves the right to validate with the client references. 9.2.2.Proof Required: The bidder must supply 2 client references and high-level project descriptions for Medium (100,000 – 199,999 employees) clients. Please note that GC reserves the right to validate with the client references. 9.2.3.Proof Required: The bidder must supply 2 client references and high-level project descriptions for

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			large (more than 200,000 employees) clients. Please note that GC reserves the right to validate with the client references.

Security and Privacy Architecture	10. The bidder must demonstrate that the proposed solution is designed and developed to ensure the security of their solution, including implementing information security policies, procedures, and security controls . Compliance must be demonstrated by providing one or more of the following industry certifications identified below, (or evidence of meeting within 1 year as of time of bidding) and validated through independent third party assessments **including but not limited to** :
	 - ISO/IEC 27001:2013 Information technology -- Security techniques -- Information security management systems – Requirements;
	 - ISO/IEC 27017:2015 Information technology -- Security techniques -- Code of practice for information security controls based on ISO/IEC 27002 for cloud services; and
	 - AICPA Service Organization Control (SOC) 2 Type II for the trust principles of security, availability, processing integrity, and confidentiality.
	    a. 7:2015 Information technology -- Security techniques -- Code of practice for information security controls based on ISO/IEC 27002 for cloud services; and
	    b. AICPA Service Organization Control (SOC) 2 Type II for the trust principles of security, availability, processing integrity, and confidentiality.
		Pass/Fail	10. Proof Required: The bidder must supply a third-party audited security certification and documentation for a recognized certification

	11. The bidder must demonstrate that the proposed solution is designed and developed to ensure the protection of personal information with the ability to audit data use and retention.	Pass/Fail	11. Proof Required: The bidder must supply, in less than one page, a brief description of how they meet criteria 11 describing standards ensuring the safeguarding of personal information and or provide technical documentation or presentations highlighting compliance.
User Experience	12. The bidder must demonstrate that the proposed solution can be accessed across various form factors and contexts of use.	Pass/Fail	12. The bidder must provide 1 video demonstrating the "solution in action" on a mobile device (mobile web browser or mobile application). Any user documentation or voice

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			over to further explain the video is recommended. A bidder can use 1 video to demonstrate multiple requirements. Example: Business Capabilities, Language, User Experience.
	13. The bidder must make accessible a commercial demonstration environment in which a government user can validate that the proposed solution and videos meet the criteria defined in 1.1.	Pass/Fail	13. Proof Required: The bidder must supply a URL and login credentials that allow the GC to confirm the existence of a commercially available solution
Costing Model	14. The bidder must provide the generic costing parameters and subscription model for the proposed solution.	Pass/Fail	14. Proof Required: The bidder must supply the generic costing parameter(s) and framework required to implement and consume the SaaS offering including the subscription model(s). Please include any relevant spreadsheet(s) or information that describes the key elements that drive the solution implementation and sustainment costing model.
Socio Economic Development Benefits	15. The bidder must demonstrate if and how a partnership with the Government of Canada could provide socio economic benefits to Canadians, beyond improving the effectiveness and efficiency of the public service workforce.	Pass/Fail	15. A presentation and-or document describing the socio economic benefits to Canadians.

B. Request to Present Submission

Optional Request to Present Submission to ITQ Gate 1	Indicate	
	YES	NO
Respondents may request to make a 60 minute presentation of their bid submission response to the evaluation committee.		
Please see section 3.3 of the ITQ Gate 1 Main Document for details and send your request via email to:		
TPSGC.PAApprovisionRHalaPaye-APHRtoPAYProcurement.PWGSC@tpsgc-pwgsc.gc.ca		

Attachment 2

Response Submission Form

for the
HR and Pay Next Generation Solution

Invitation to Qualify
(ITQ)
No. 24062-190560

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Attachment 2

Response Submission Form

<table>
<tr><td colspan="4" align="center">Invitation to Qualify No. 24062-190560
Response Submission Form</td></tr>
<tr><td>Respondent's full legal name

In the case of a joint venture, please identify all members.</td><td colspan="3"></td></tr>
<tr><td rowspan="6">Authorized Representative of Respondent for evaluation purposes (e.g., clarifications)</td><td>Name</td><td colspan="2"></td></tr>
<tr><td>Title</td><td colspan="2"></td></tr>
<tr><td>Address</td><td colspan="2"></td></tr>
<tr><td>Telephone #</td><td colspan="2"></td></tr>
<tr><td>Fax #</td><td colspan="2"></td></tr>
<tr><td>Email</td><td colspan="2"></td></tr>
<tr><td>Respondent's Procurement Business Number (PBN)

Please see PWGSC Standard Instructions. Please make sure that your PBN matches the legal name under which you have submitted your response. If it does not, the Respondent will be determined based on the legal name provided, not based on the PBN, and the Respondent will be required to submit the PBN that matches the legal name of the Respondent.</td><td colspan="3"></td></tr>
<tr><td rowspan="4">Former Public Servants

Please see the Section of PWGSC Standard Instructions entitled "Former Public Servants" for more information.

If you are submitting a response as a joint venture, please provide this information for each member of the joint venture.</td><td rowspan="2">Is the Respondent a Former Public Servant in receipt of a pension as defined in PWGSC Standard Instructions? If yes, provide the information required by the Section in PWGSC Standard Instructions entitled "Former Public Servant"</td><td>Yes</td><td></td></tr>
<tr><td>No</td><td></td></tr>
<tr><td rowspan="2">Is the Respondent a Former Public Servant who received a lump sum payment under the terms of the work force adjustment directive? If yes, provide the information required by the Section in PWGSC Standard Instructions entitled "Former Public Servant"</td><td>Yes</td><td></td></tr>
<tr><td>No</td><td></td></tr>
<tr><td rowspan="7">Federal Contractors Program for Employment Equity Certification

Please see the section of PWGSC Standard Instructions entitled "Federal Contractors Program for Employment Equity" for more information.

Please check one of the boxes or provide the required information. If you are submitting a response as a joint venture, please provide this information for each member of the joint venture.</td><td colspan="2">The Respondent certifies having no work force in Canada.</td><td></td></tr>
<tr><td colspan="2">The Respondent certifies being a public sector employer.</td><td></td></tr>
<tr><td colspan="2">The Respondent certifies being a federally regulated employer subject to the Employment Equity Act.</td><td></td></tr>
<tr><td colspan="2">The Respondent certifies having a combined work force in Canada of fewer than 100 permanent full-time, part-time and temporary employees.</td><td></td></tr>
<tr><td colspan="2">The Respondent has a combined workforce in Canada of 100 or more permanent full-time, part-time and temporary employees.</td><td></td></tr>
<tr><td colspan="2">Valid and current Certificate number.</td><td></td></tr>
<tr><td colspan="2">The Respondent certifies having submitted the Agreement to Implement Employment Equity (LAB1168) to ESDC-Labour.</td><td></td></tr>
<tr><td>Requested language for future communications regarding this procurement process – please indicate either French or English</td><td colspan="3"></td></tr>
</table>

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Requested Canadian province or territory for applicable laws		
Respondent's Proposed Site or Premises Requiring Safeguard Measures and document safeguarding security level	Street Address with Unit/Apartment, if applicable	
	City	
	Province/Territory/State	
	Postal Code/Zip Code	
	Country	
Security Clearance Level of Respondent *Please ensure that the security clearance matches the legal name of the Respondent. If it does not, the security clearance is not valid for the Respondent.*	Clearance Level	
	Date Granted	
	Issuing Entity (PWGSC, RCMP, etc.)	
	Legal name of entity to which clearance issued	
On behalf of the Respondent, by signing below, I confirm that I have read the entire ITQ, including the documents incorporated by reference into the ITQ, and I certify and agree that: 1. The Respondent considers itself and its products able to meet all the mandatory requirements described in the ITQ; 2. All the information provided in the response is complete, true and accurate; and 3. The Respondent agrees to be bound by all the terms and conditions of this ITQ, including the documents incorporated by reference into it.		
Signature of Authorized Representative of Respondent		

Attachment 3

Gate Collaboration Process

for the
HR and Pay Next Generation Solution

Gate 1

Invitation to Qualify
(ITQ)
No. 24062-190560

Solicitation No. - N° de l'offre	N° de la modif - Amd. No.	Id de l'acheteur - Buyer ID
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Attachment 3

Gate Collaboration Process

1.1 Introduction

a) The GC recognizes that engagement and collaboration throughout a procurement process can help reduce the overall rework burden on potential bidders, help ensure vendors make a reasonable return on their investments and that the overall process delivers solid benefits to Canadians.

b) The ITQ Gate 1 HR and Pay Next Generation Solution will follow an Agile Procurement Process that will facilitate robust dialogue and two-way communication, quality feedback, and disclosure of information right up until the RFP is issued.

1.2 Prior to Gate 1

a) Prior to Gate 1, the Collaboration Process started with the publication of Notice of Planned Procurement on September 5th, 2018 in order to announce an Industry Day was planned for September 19, 2018. The objectives of this day were to present the scope of the work for the Next Generation HR and Pay Team, its current challenges, and the team's approach. Industry also had the opportunity to hear about our planned Agile Procurement Process (APP).

b) Prior to the Industry Day, we released on Buy and Sell and on WikiCollab the Draft Evaluation Criteria for Gate 1, in order to engage Industry, encourage feedback and to remain open and transparent during the APP.

c) During Industry Day, we shared information with the vendors about the project and the planned APP. We had an open dialogue with attendees, addressed questions and received lots of feedback from vendors. All questions and answers will be posted on Buy and Sell.

d) We began to schedule one-on-one meetings with vendors following the Industry Day. The purpose of these meeting will be to encourage additional feedback and engage the participants in a closed forum.

e) All questions and answers coming from the one-on-one meetings will also be posted on Buy and Sell throughout the APP, at any phase in the process.

f) The Government of Canada will update all documents based on relevant feedback from Industry.

1.3 During Gate 1

a) The ITQ Gate 1 will be posted on Buy and Sell. This is the first phase of the qualification process in order to be eligible to bid on the RFP for the HR and Pay Next Generation solution.

b) Respondents will be required to submit responses by the time and date indicated.

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c)   All questions can be sent through Buy and Sell. All questions and answers will be posted in a timely manner.

d)   The Government of Canada will post a draft on Buy and Sell of business capabilities and user stories that will be tested in the sandbox provided by the vendors at ITQ Gate 2, in order to allow for preparation in parallel.

e)   The Government of Canada will also post on Buy and Sell a draft of ITQ Gate 2 Evaluation Criteria and potentially other relevant documents related to the process.

1.4   Between Gate 1 and Gate 2

a)   The Government of Canada will notify the vendors of the results of the evaluation within 20 business days after the closing of ITQ Gate 1.

b)   The Government of Canada could potentially schedule one-on-one meetings with qualified Gate 1 Respondents, in order to seek additional feedback.

c)   When and where appropriate, the Government of Canada will provide feedback as to how it is using, or not using, the feedback received.

d)   The Government of Canada may then make modifications to the requirements and plans on publishing the updated ITQ Gate 2 documents as per feedback from the industry.

e)   The Government of Canada plans on publishing questions and answers, throughout the process.

1.5   During Gate 2

a)   All questions asked by qualified Respondents will be answered and posted on Buy and Sell.

b)   The Government of Canada will share a draft of the RFP Evaluation Criteria.

1.6   After Gate 2

a)   The Government of Canada plans on publishing questions and answers, throughout the process.

1.7   RFP

a)   The Government of Canada will post the RFP and invite qualified Respondents to bid on the solicitation.

Attachment 4

Mandatory Requirements & Criteria Checklist
ITQ - Gate 1

for the
HR and Pay Next Generation Solution

Invitation to Qualify
(ITQ)
No. 24062-190560

Respondent	
Name	
Phone number	
email	

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Business Architecture

MANDATORY CRITERIA 1

The bidder must demonstrate they can provide a solution for current and future HR & Pay business capabilities.

1.1. The solution must cover three out the five following business capabilities, DA2, DA3, DA4, DA5 and DA6, as per the GC HCM Business reference model of which one must be DA5.

Proof Required: Three single videos, up to 5 minutes, demonstrating the "solution in action" with either a French or English user interface that demonstrates three out of five business capabilities for DA2, DA3, DA4, DA5 and DA6, of which one must be DA5. Any user documentation or voice over to further explain the video is recommended. High level architectural information is also recommended to list key technical capabilities, platform type and version, module names.

Respondent Name		RESULT	
Email		PASS	FAIL

Criteria	Specifications	Architecture Information of solution	File Name(s) or Link to URL
DA2 – Talent Acquisition Attracting, recruiting, assessing, and selecting employees with the right skills and competencies.	1 video of no more than 5 minutes		
DA3 – Talent Development Develop and retain talent through the implementation and maintenance of employee development and engagement programs to meet the current and future talent demands.	1 video of no more than 5 minutes		
DA4 – Departmental / Agency Employee Performance Management Manage employee performance.	1 video of no more than 5 minutes		
DA5 – Compensation and Leave Manage and process leave and pay.	1 video of no more than 5 minutes		
DA6 – Separation Manage employee off-boarding.	1 video of no more than 5 minutes		

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1.2

The bidder must provide a list of planned product and solution improvements (product roadmap) for any solutions covering the capabilities in the GC HCM Business Reference Model.

Proof Required: The bidder must supply presentation(s) and-or document(s) explaining the proposed HCM Solution Roadmap(s).

Respondent Name		RESULT	
Email		PASS	FAIL
File Name(s) or Link to URL			
Explanation			

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Business Architecture

MANDATORY CRITERIA 2

The bidder must own the intellectual property for the core HCM platform included in the proposed solution (excluding add-ons and extensions), in order to allow for the bidder to introduce and support product enhancements into the main commercial product to align with GC needs.

Proof Required: The bidder must supply, in less than one page, a brief description of how they meet criteria 2.

Respondent Name		RESULT	
Email		PASS	FAIL
Explanation			

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Business Architecture

MANDATORY CRITERIA 3

The platform owner must accept to be prime contractor for the implementation of the proposed solution, in partnership with the Government of Canada.

Proof Required: The bidder must supply, in less than one page, a brief description of how they meet criteria 3.

Respondent Name		RESULT	
Email		PASS	FAIL
Explanation			

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Business Architecture

MANDATORY CRITERIA 4

The bidder must demonstrate that the proposed solution is available in both of Canada's official languages (French and English).

Proof Required: The bidder must supply a single video (of less than 5 minutes) demonstrating the "solution in action" with a French user interface providing one of the business capabilities as per the GC HCM Business reference model: DA2, DA3, DA4, DA5, and DA6. Any user documentation or voice over to further explain the video is recommended. High level architectural information is also recommended to list key technical capabilities, platform type and version, module names.

Respondent Name		RESULT	
Email		PASS	FAIL
Selected Capability (DA2 to DA6)	**Video Name or Link to URL**		

Brief explanation of architectural information
Example: Platform version, application modules demonstrated, technology capabilities (Artificial Intelligence, Reporting…)

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Business Architecture

MANDATORY CRITERIA 5

The bidder must demonstrate that the proposed solution meets, or will be meeting within 1 year as of time of bidding, WCAG 2.0 AA requirements.

Proof Required: The bidder must supply **(A)** Results of an accessibility assessment, approach or attestation; or **(B)** A plan to reach compliance within 1 year of the time of bidding.

Respondent Name		RESULT	
Email		PASS	FAIL
Submitted Proof (A or B)	File Name(s) or Link to URL		
Explanation			

Solicitation No. - N° de l'offre	N° de la modif - Amd. No.	Id de l'acheteur - Buyer ID
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Information & Data Architecture

MANDATORY CRITERIA 6

The bidder must have the ability for the GC to store and protect its information at rest, including data in backups or maintained for redundancy purposes within the geographic boundaries of Canada, in alignment with the GC's Direction for Electronic Data Residency.

Proof Required: The bidder must supply, in less than one page, a brief description of how they meet criteria 6. High level architectural information is also recommended listing datacenter location(s) and other relevant information.

Respondent Name		RESULT	
Email		PASS	FAIL
Explanation			

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Application Architecture

MANDATORY CRITERIA 7

The bidder must demonstrate that the proposed solution includes a library of secure bi-directional Application Programming Interfaces (API) connections that are available to external systems.

7.1
The proposed solution must protect information through secure authentication methods using open standards. (Including but not limited to: Open ID or OAuth or SAML)

Proof Required: The bidder must supply, in less than one page, a brief description of how they meet criteria 7.1 or provide technical documentation or presentations highlighting compliance.

Respondent Name		RESULT	
Email		PASS	FAIL
File Name(s) or Link to URL			
Explanation			

Solicitation No. - N° de l'offre	N° de la modif - Amd. No.	Id de l'acheteur - Buyer ID
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7.2

All APIs must be exposed via industry open standard bindings and protocols. (Including but not limited to: REST/JSON or SOAP/XML)

Proof Required: The bidder must supply, in less than one page, a brief description of how they meet criteria 7.2 or provide technical documentation or presentations highlighting compliance.

Respondent Name		RESULT	
Email		PASS	FAIL
File Name(s) or Link to URL			
Explanation			

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7.3

All APIs must be able to expose data as non-proprietary business entity or object schemas. Specifically, APIs must be able to abstract raw back-end table or data structures.

Proof Required: The bidder must supply, in less than one page, a brief description of how they meet criteria 7.3 or provide technical documentation or presentations highlighting compliance.

Respondent Name		RESULT	
Email		PASS	FAIL
File Name(s) or Link to URL			
Explanation			

Solicitation No. - N° de l'offre	N° de la modif - Amd. No.	Id de l'acheteur - Buyer ID
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7.4

The solution API library must include the core business functionality that allows external information consumption and information provisioning for at least the compensation (including pay) business capabilities.

Proof Required: The bidder must supply, in less than one page, a brief description of how they meet criteria 7.4 or provide technical documentation or presentations highlighting compliance and supply a link to or a listing of the API library.

Respondent Name		RESULT	
Email		PASS	FAIL
File Name(s) or Link to URL			
Explanation			

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7.5

Please provide two customer references where your HCM solution was integrated with an SAP financial system as this is the GC approved standard for Finance/Material business capabilities.

Proof Required: The supplier must provide two customer references and a summary of information and technology used to exchange data. Please note that GC reserves the right to validate with the client references.

Respondent Name		RESULT	
Email		PASS	FAIL
Client Reference 1			
Company Name			
Contact Name			
Summary of Information Exchanged (E.g Salary Forecasting.)			
Summary of Technology Used			
Version of SAP			
Client Reference 2			
Company Name			
Contact Name			
Summary of Information Exchanged (E.g. Client Master Record)			
Summary of Technology Used			
Version of SAP			

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Technology Architecture

MANDATORY CRITERIA 8

The bidder must demonstrate that the proposed solution is offered through a Software as a Service (SaaS) model.

8.1
The solution must be offered through a SaaS model as defined by National Institute of Standards and Technology special publication 800-145.

Proof Required: The bidder must supply, in less than one page, a brief description of how they meet criteria 8.1 and must provide technical documentation or presentations describing standard service level agreements.

Respondent Name		RESULT	
Email		PASS	FAIL
File Name(s) or Link to URL			
Explanation			

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8.2

The solution must be offered through a SaaS model meeting the essential cloud characteristics as defined by NIST SP800-145 (https://csrc.nist.gov/publications/detail/sp/800-145/final|) including:

8.2.1 On-demand self-service
8.2.2 Broad network access
8.2.3 Resource pooling
8.2.4 Rapid elasticity
8.2.5 Measured Service

__Proof Required__: The bidder must supply, in less than one page, a brief description of how they meet criteria 8.2 or provide technical documentation or presentations highlighting compliance. High level information is also recommended to describe high level cloud architecture.

Respondent Name		RESULT	
Email		PASS	FAIL
File Name(s) or Link to URL			
Explanation			

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Technology Architecture

MANDATORY CRITERIA 9

The bidder must demonstrate that the proposed solution is proven and scalable for different sizes of organizations.

9.1

The bidder must demonstrate that the proposed solution can scale to complete pay for multiple organizations or one organization within a single pay-cycle for 350,000 employees or more.

Proof Required: The bidder must supply 1 client reference and high-level project description that demonstrates that the proposed solution can scale to complete pay for multiple organizations or one organization within a single pay-cycle for 350,000 employees or more. Please note that GC reserves the right to validate with the client references.

Respondent Name		RESULT	
Email		PASS	FAIL
Client Reference 1			
Company Name			
Contact Name			
Title			
Phone number			
Email			
Project Description			
Client Reference 2			
Company Name			
Contact Name			
Title			
Phone number			
Email			
Project Description			

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9.2

The bidder must provide references for various sizes of organizations by providing two references for each of the following:

9.2.1   Organizations of 1 – 50,000 employees clients; and
9.2.2   Organizations of 51,000 – 99,999 employees clients
9.2.3   Organizations of more than 100,000 employees clients

Proof Required:

9.2.1   Proof Required: The bidder must supply 2 client references and high-level project descriptions for Small (1 – 99,999 employees) clients. Please note that GC reserves the right to validate with the client references.

Respondent Name		RESULT	
Email		PASS	FAIL
Client Reference 1			
Company Name			
Contact Name			
Title			
Phone number			
Email			
Project Description			
Client Reference 2			
Company Name			
Contact Name			
Title			
Phone number			
Email			
Project Description			

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9.2.2   Proof Required: The bidder must supply 2 client references and high-level project descriptions for Medium (100,000 – 199,999 employees) clients. Please note that GC reserves the right to validate with the client references.

Respondent Name		RESULT	
Email		PASS	FAIL
Client Reference 1			
Company Name			
Contact Name			
Title			
Phone number			
Email			
Project Description			
Client Reference 2			
Company Name			
Contact Name			
Title			
Phone number			
Email			
Project Description			

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9.2.3   Proof Required: The bidder must supply 2 client references and high-level project descriptions for large (more than 200,000 employees) clients. Please note that GC reserves the right to validate with the client references.

Respondent Name		RESULT	
Email		PASS	FAIL
Client Reference 1			
Company Name			
Contact Name			
Title			
Phone number			
Email			
Project Description			
Client Reference 2			
Company Name			
Contact Name			
Title			
Phone number			
Email			
Project Description			

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Security and Privacy Architecture

MANDATORY CRITERIA 10

The bidder must demonstrate that the proposed solution is designed and developed to ensure the security of their solution, including implementing information security policies, procedures, and security controls. Compliance must be demonstrated by providing one or more of the following industry certifications identified below (or evidence of meeting within 1 year as of time of bidding), and validated through independent third party assessments **including but not limited to:**

- ISO/IEC 27001:2013 Information technology -- Security techniques -- Information security management systems – Requirements;
- ISO/IEC 27017:2015 Information technology -- Security techniques -- Code of practice for information security controls based on ISO/IEC 27002 for cloud services; and
- AICPA Service Organization Control (SOC) 2 Type II for the trust principles of security, availability, processing integrity, and confidentiality.
    a. 7:2015 Information technology -- Security techniques -- Code of practice for information security controls based on ISO/IEC 27002 for cloud services; and
    b. AICPA Service Organization Control (SOC) 2 Type II for the trust principles of security, availability, processing integrity, and confidentiality.

Proof Required: The bidder must supply a third-party audited security certification and documentation for a recognized certification or evidence of meeting within 1 year as of time of bidding.

Respondent Name		RESULT	
Email		PASS	FAIL
Third-party Auditor Name	**File Name(s) or Link to URL**		

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Security and Privacy Architecture

MANDATORY CRITERIA 11

The bidder must demonstrate that the proposed solution is designed and developed to ensure the protection of personal information with the ability to audit data use and retention.

Proof Required: The bidder must supply, in less than one page, a brief description of how they meet criteria 11 describing standards ensuring the safeguarding of personal information and or provide technical documentation or presentations highlighting compliance.

Respondent Name		RESULT	
Email		PASS	FAIL
File Name(s) or Link to URL			
Explanation			

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User Experience

MANDATORY CRITERIA 12

The bidder must demonstrate that the proposed solution can be accessed across various form factors and contexts of use.

Proof Required: The bidder must provide 1 video demonstrating the "solution in action" on a mobile device (mobile web browser or mobile application). Any user documentation or voice over to further explain the video is recommended. A bidder can use 1 video to demonstrate multiple requirements. Example: Business Capabilities, Language, User Experience.

Specification	File Name(s) or Links to URL
No more than 5 minutes	
Explanation	

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CRITERIA 13

The bidder must make accessible a commercial demonstration environment in which a government user can validate that the proposed solution and videos meet the criteria defined in 1.1.

Proof Required: The bidder must supply a URL and login credentials that allow the GC to confirm the existence of a commercially available solution.

Respondent Name		RESULT	
Email		PASS	FAIL
URL	**Login Credential**		

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Costing Model

MANDATORY CRITERIA 14

The bidder must provide the generic costing parameters and subscription model for the proposed solution.

Proof Required: The bidder must supply the generic costing parameter(s) and framework required to implement and consume the SaaS offering including the subscription model(s). Please include any relevant spreadsheet(s) or information that describes the key elements that drive the solution implementation and sustainment costing model.

Note: Any costing information provided will not be used for financial evaluation or assessment; for information only.

Respondent Name		RESULT	
Email		PASS	FAIL
File Name(s) or Link to URL			

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Socio Economic Development Benefits

MANDATORY CRITERIA 15

The bidder must demonstrate if and how a partnership with the Government of Canada could provide socio economic benefits to Canadians, beyond improving the effectiveness and efficiency of the public service workforce.

Proof Required: The bidder must supply a presentation and-or document describing the socio economic benefits to Canadians.

Respondent Name		RESULT	
Email		PASS	FAIL
File Name(s) or Link to URL			
Explanation			