



<b>Position: Senior Application/Software Architect</b>
<b>Reference #: 2485</b>
<b>Department: Canadian Institutes of Health Research</b>
<b>Security Clearance: Reliability</b>
<b>Location: Remote</b>
Pay rate is negotiable
<b>Contract Length: 1 year</b>
<b>Language: English Essential</b>

## Statement Of Work

### Title

1.1. The Canadian Institutes of Health Research (“CIHR”) requires the professional services of one (1) Application/Software Architect (Level 3) to implement Microsoft Project Online and complete related activities for the project entitled “Project Management Solution”.

### 2.0 Background

2.1. CIHR is Canada’s federal funding agency for health research. CIHR collaborates with partners and researchers to deliver on its mission: To create new scientific knowledge and to enable its translation into improved health, more effective health services and products, and a strengthened Canadian health care system. Created in 2000, under the Canadian Institutes of Health Research Act, CIHR is an independent agency and is accountable to Parliament through the Minister of Health.

2.2. Currently, CIHR staff do not have a suitable collaborative project management tool available to support their work activities. Although a very limited number of CIHR employees have access to Microsoft Project Professional 2016 desktop version, the majority of staff are now relying on tools, such as Microsoft Excel, which are insufficient for the management and documentation of complex projects. In 2020, a project was initiated to identify and implement a suitable project management software for CIHR. Following an options analysis comparing various project management tools against identified organizational needs, CIHR’s Enterprise Architecture Review Board (EARB) endorsed, and the Project Sponsor approved, Microsoft Project Online (“Project Online”) as the preferred solution. Software subscriptions have since been procured for CIHR staff in preparation for design and configuration of Project Online.

### 3.0 Objectives

3.1. The objective of the Application/Software Architect is to collaborate on the implementation of Project Online on CIHR's existing M365 platform, for use by staff as a project and portfolio management solution (with an estimated launch date of Summer 2023). Project Online should provide CIHR with visibility into its resources, teams, and projects in order to help maintain and enhance business functions as an organization. The solution should also help CIHR to align its projects with corporate strategic priorities and promote standardized approaches to project and portfolio management across the organization.

#### **4.0 Tasks/Scope of Work**

**The Contractor will complete the following tasks to the satisfaction of the CIHR Project Authority:**

4.1. In collaboration with the CIHR Project Team (which includes CIHR staff and external contractors), support the development of a project work plan that identifies and tracks the Project Online implementation project activities and timelines.

4.2. Review high-level business requirements provided by the CIHR Project Team and conduct sessions to gather and document additional detailed requirements from CIHR Subject Matter Experts (SMEs) to inform the design and/or configuration of the following elements within Project Online:

- (a) Milestone-based project management templates;
- (b) Feature and functionalities that will enable CIHR's core Project Portfolio Management (PPM) processes;
- (c) A Project Governance Workflow that follows the Treasury Board Secretariat's (TBS) gated project structure and supports CIHR's existing Project Management Framework (i.e., gating processes, gate decisions, required document template artifacts);
- (d) A simplified Project Workflow;
- (e) Detailed design elements including, but not limited to, custom fields, security, calendars, project schedule templates, Project Detail Pages, Project Sites, Enterprise Project Types, Enterprise Custom Fields, lookup tables, resource management as well as the Resource Pool, modification, and creation of custom Views targeted by audience;
- (f) Reports and dashboards using Power BI with design elements including, but not limited to, layouts, permissions, data elements, business rules, and accessibility;
- (g) Bilingual (i.e., English and French) software design/configuration; and
- (h) Role-based access control (RBAC) using Microsoft Active Directory.

4.3. Complete development and configuration of the solution to configure Project Online according to the requirements gathered and documented in Section 4.2. Integrate Project Online into CIHR's Microsoft 365 tenant, including creating and configuring site collections and Project Web Apps.

4.4. Support the identification of system security details, consulting with Microsoft and CIHR Project and IT Security teams as needed. System security details to be identified include:

- (a) Major system components, system interfaces (internal/external), system interdependencies and dependencies;
- (b) Description of technical, network, and security system attributes (e.g., network topology, technical and security architecture documents);
- (c) System Diagram (i.e., high-level network diagram);
- (d) Authorization Boundaries (e.g., identification of system components or services, including data, software, hardware, services, etc.) that belong and do not belong to CIHR to better understand the boundaries and limits of the authorization;
- (e) System Access (e.g., internet, remote access, authentication);
- (f) Development of a Concept of Operations (as part of System Profile Description) and Configuration Build Books documents;
- (g) Implementation of Security Controls and description of how the controls are employed within the system and its environment of operation. Provide evidence to CIHR IT Security Assessor;
- (h) Monitoring of the Security Controls;
- (i) Technical (e.g., access control, audit and accountability, identification and authentication, system and communications protection);
- (j) Operational (e.g., awareness and training, configuration management, contingency planning, incident response, maintenance, media protection, physical and environmental protection, personnel security, system and information integrity, planning, risk assessment); and
- (k) Any additional security capabilities.

4.5. Perform unit testing of the developed/configured solution, including:

- (a) Unit testing of the configuration while validating that the configuration meets documented Configuration Requirements,
- (b) Unit testing of all developed Reports and Workflows to ensure that work meets documented requirements; and
- (c) Unit testing of all other developed custom code.

4.6. Conduct end-to-end testing of the entire solution to ensure that the solution is working as designed and meets overall requirements (i.e., Configuration, Workflow, and Reporting requirements).

4.7. Support User Acceptance Testing (UAT) and system testing of the implemented solution by CIHR Project Team, as required.

4.8. Provide hands-on support to address any bug fixes that need to be applied prior to full launch of Project Online to all CIHR staff.

4.9. Provide knowledge transfer to CIHR System Administrators (M365 Global Admin, Project Online Administrator) to ensure the CIHR Project Team understands the specific configuration.

4.10. Provide the CIHR Project Team with technical support, guidance, and regular project status updates (twice per week, at minimum, by email and through virtual meetings using Microsoft Teams) throughout the length of the project and four (4) weeks post-implementation.

## 5.0 Deliverables

**The Contractor will complete the following deliverables to the satisfaction of the CIHR Project Authority:**

Item	Deliverable Description
5.1	Submit documents describing the solution design based on gathered requirements (outlined in Section 4.2), including project templates, PPM processes, project governance workflows, reports and dashboards, and other detailed design elements.
5.2	Complete the configuration of Project Online (as per Section 4.3), including the development of project templates, PPM processes, governance workflows, and reports and dashboards.
5.3	Complete all testing tasks (as outlined in Sections 4.5 to 4.8), including unit testing and end-to-end testing of the solution.
5.4	Complete all support tasks (as outlined in Sections 4.1, 4.4, 4.9 and 4.10).

**NOTE:** Due dates for all deliverables outlined in Section 5.0 will be agreed upon between the Contractor and the CIHR Project Team when developing the project work plan at the start of the project.

## 6.0 Constraints

6.1 The Contractor must be able to work in collaboration with the CIHR Project Team. The Contractor will submit all tasks and deliverables to the Project Team, who will provide feedback to be incorporated by the Contractor prior to finalizing the deliverables/tasks for approval by the CIHR Project Authority.

6.2 All tasks and deliverables must be submitted according to dates and in formats agreed upon by the Contractor and the CIHR Project Team prior to the start of work.

6.3 The services provided by the Contractor may include advice and recommendations, but all decisions in connection with the implementation of such advice and recommendations shall be the responsibility of and made by the CIHR Project Authority.

## 7.0 Language

7.1 English is the language of work for all activities related to this Contract. All tasks and deliverables will be delivered in English unless otherwise specified in Sections 4.0 and 5.0.

## 8.0 Meetings

8.1 Continuous and regular progress status meetings will be held on a twice-weekly basis via Microsoft Teams with the CIHR Project Authority in English. Additional meetings may be scheduled as required. The Contractor will not be reimbursed for costs incurred as a result of any meetings.

**9.0 Location of Work and Support**

9.1. Work under this contract can be conducted offsite at the Contractor’s facility with pre-approval of the Project Authority. CIHR will provide the Contractor with a network account, remote access capabilities and a CIHR-issued laptop. The Contractor must use a CIHR laptop and the Contractor is not authorized to use its own equipment or connect to the CIHR network using any non-CIHR issued devices.

9.2. As required for the conduct of the work, CIHR will provide the Contractor with access to existing background information, including available project management, business and technical documentation, existing policies, procedures and work processes and tools, project and planning documentation and artefacts, and works in progress developed by the CIHR.

**10.0 Travel**

10.1 CIHR shall not pay for any travel or living expenses under this Contract.

**11.0 Level of Effort**

The level of effort that will be required to support this requirement is as follows:

**A.1 Application/Software Architect (Level 3)**

70 days
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**NOTE: This level of effort is only an estimate made in good faith and is not to be considered in any way as a commitment from Canada.**

**Mandatory Criteria**

Mandatory Technical Criteria			
A.1 Application/Software Architect (Level 3)			
Name of resource:			
#	Criteria Description	Contractor’s Response	
		Met / Not Met	Bid Reference Page #

<b>M1</b>	<p>The Bidder's proposed resource must have 10 years of experience in the last 15 years in providing the services of an Application/Software Architect.</p> <p>The Bidder must provide the following details for each of the identified projects:</p> <ul style="list-style-type: none"> <li>• Name of the client organization.</li> <li>• Name of the client reference (including telephone number or email).</li> <li>• A brief description of the projects.</li> <li>• Start and end date of the projects.</li> </ul>		
<b>M2</b>	<p>The Bidder's proposed resource must have successfully completed at least two (2) Microsoft Project Server or Microsoft Project Online implementation, configuration, and customization projects in a senior role within the last five (5) years.</p> <p>The Bidder must provide the following details for each of the identified projects:</p> <ul style="list-style-type: none"> <li>• Name of the client organization.</li> <li>• Name of the client reference (including telephone number or email).</li> <li>• A brief description of the projects, including scope, deliverables, objectives to be achieved, and the results (i.e., outcome of the work).</li> <li>• Start and end date of the projects.</li> </ul>		

**Point Rated Criteria**

<b>Point-Rated Technical Criteria (RA)</b>				
<b>A.1 Application/Software Architect (Level 3)</b>				
<b>Name of resource:</b>				
<b>R#</b>	<b>Point-Rated Requirement</b>	<b>Point Breakdown</b>	<b>Max Score</b>	<b>Bid Reference Page #</b>
<b>R1</b>	<p>The Bidder's proposed resource should have experience implementing a Microsoft (MS) Project Online solution, including the following elements:</p> <ol style="list-style-type: none"> <li>1. Integrating MS Project Online in an existing M365 tenant;</li> <li>2. Creating and configuring SharePoint collections;</li> </ol>	<p><b>Score is calculated as:</b></p> <p>Up to six (6) points per project to a maximum of 30 points for five (5) projects.</p> <p><b><u>Point allocation:</u></b></p>		

	<ol style="list-style-type: none"> <li>3. Creating and configuring Project Web App (PWA);</li> <li>4. Enabling multi-language;</li> <li>5. Configuring authentication using Active Directory; and</li> <li>6. Designing and implementing role-based security.</li> </ol> <p><b>The Bidder must provide the following details for each of the identified projects:</b></p> <ul style="list-style-type: none"> <li>• Name of the client organization.</li> <li>• Name of the client reference (including telephone number or email).</li> <li>• A brief description of the projects, including scope, deliverables, objectives to be achieved, and the results (i.e., outcome of the work).</li> <li>• Start and end date of the projects.</li> </ul>	<ul style="list-style-type: none"> <li>• One (1) point per <u>element</u> implemented per project.</li> </ul>	30	
<b>R2</b>	<p>The Bidder’s proposed resource should have experience configuring and customizing Microsoft Project Online, including the following elements:</p> <ul style="list-style-type: none"> <li>• Workflow and project template design and implementation;</li> <li>• Customization of timesheets, custom fields, calendars and lookup tables;</li> <li>• Enabling and configuring the resource center; and</li> <li>• Enabling Portfolio analysis and linkage to business drivers.</li> </ul> <p><b>The Bidder must provide the following details for each of the identified projects:</b></p> <ul style="list-style-type: none"> <li>• Name of the client organization.</li> <li>• Name of the client reference (including telephone number or email).</li> <li>• A brief description of the projects, including scope, deliverables, objectives to be achieved, and the results (i.e., outcome of the work).</li> <li>• Start and end date of the projects.</li> </ul>	<p><b>Score is calculated as:</b></p> <p>Up to five (5) points per project to a maximum of 20 points for four (4) projects.</p> <p><b><u>Point allocation:</u></b></p> <ul style="list-style-type: none"> <li>• Three (3) points to be awarded for clearly describing <u>all required details</u> for each project.</li> <li>• Two (2) points to be awarded for each project if the scope of work and deliverables are similar to this project based on the Statement of Work.</li> </ul>	20	
<b>R3</b>	<p>The Bidder’s proposed resource should have experience within the last 15 years leading discussions and requirements gathering sessions with Subject Matter Experts.</p>	<p><b>Score is calculated as:</b></p> <p>Up to five (5) points per project to a maximum of 20 points for four (4) projects.</p>		

	<p><b>The Bidder must provide the following details for each of the identified projects:</b></p> <ul style="list-style-type: none"> <li>• Name of the client organization.</li> <li>• Name of the client reference (including telephone number or email).</li> <li>• A brief description of the projects, including scope, deliverables, objectives to be achieved, and the results (i.e., outcome of the work).</li> <li>• Start and end date of the projects.</li> </ul>	<p><b><u>Point allocation:</u></b></p> <ul style="list-style-type: none"> <li>• Three (3) points to be awarded for clearly describing all required details for each project.</li> <li>• Two (2) points to be awarded for each project if the scope of work and deliverables are similar to this project based on the Statement of Work.</li> </ul>	20	
R4	<p>The Bidder’s proposed resource should have experience developing technical documentation and user guides to capture design, configuration, and reporting requirements for Microsoft Project Online.</p> <p><b>The Bidder must provide the following <u>details</u> for each of the identified projects:</b></p> <ul style="list-style-type: none"> <li>• Name of the client organization.</li> <li>• Name of the client reference (including telephone number or email).</li> <li>• A brief description of the projects, including scope, deliverables, objectives to be achieved, and the results (i.e., outcome of the work).</li> <li>• Start and end date of the projects.</li> </ul>	<p><b>Score is calculated as:</b></p> <p>Up to five (5) points per project to a maximum of 15 points for three (3) projects.</p> <p><b><u>Point allocation:</u></b></p> <ul style="list-style-type: none"> <li>• Three (3) points to be awarded for clearly describing <u>all required details</u> for each project.</li> <li>• Two (2) points to be awarded for each project if the scope of work and deliverables are similar to this project based on the Statement of Work.</li> </ul>	15	
R5	<p>The Bidder’s proposed resource should have experience designing and developing Microsoft Project Online reports and dashboards using Power BI technology.</p> <p><b>The Bidder must provide the following details for each of the identified projects:</b></p> <ul style="list-style-type: none"> <li>• Name of the client organization.</li> <li>• Name of the client reference (including telephone number or email).</li> </ul>	<p><b>Score is calculated as:</b></p> <p>Up to four (4) points per project to a maximum of 12 points for three (3) projects.</p> <p><b><u>Point allocation:</u></b></p> <ul style="list-style-type: none"> <li>• Two (2) points per project for designing Microsoft Project</li> </ul>	12	



	<ul style="list-style-type: none"> <li>• A brief description of the projects, including scope, deliverables, objectives to be achieved, and the results (i.e., outcome of the work).</li> <li>• Start and end date of the projects.</li> </ul>	<p>Online reports and dashboards using Power BI technology.</p> <ul style="list-style-type: none"> <li>• Two (2) points per project for developing Microsoft Project Online reports and dashboards using Power BI technology.</li> </ul>		
<b>R6</b>	<p>The Bidder's proposed resource should have obtained one of the following:</p> <ol style="list-style-type: none"> <li>1. Microsoft SharePoint Certifications (MSC) in Project Server, SharePoint or other relevant domains;</li> <li>2. Microsoft Certified Solutions Expert (MCSE); or</li> <li>3. Microsoft Certified Solutions Developer (MCSD).</li> </ol> <p>Equivalent certifications will be assessed by the CIHR based on their compliance with the requested certifications. Please provide a link to the certification's curriculum with your proposal. Certification(s) must be valid, and proof of certification must be provided with bid.</p>	<p><b>Score is calculated as:</b></p> <p>One (1) point per certification to a maximum of three (3) points for three (3) certifications.</p>	3	
<b>Maximum Available Points</b>		100 points		
<b>Minimum Points Required</b>		75 points		
<b>Points Achieved</b>				