Annex A – Statement of Work (SOW)
Knowledge Management (KM) Implementation
Contact Centre Solution (CCS) project

Table of Contents

1 Title Description

Implementation of a centralized KM solution with support services and artificial intelligence (AI) enablement.

2 Objective of TA

The Contractor must implement an AI enabled centralized KM solution. The KM solution must replace existing platforms as detailed in section 3.1 ESDC's Current Knowledge Management Environment and establish a single source of truth to provide consistent information and improve the user experience across all channels and programs.

3 Background

ESDC's current KM environment consists of multiple major tools supporting different business lines and programs. There are more than 44,000 files across these tools managed by more than 140 Employees. Each tool varies in technical, and modernization needs, and none meets the current business requirements.

3.1 ESDC's Current Knowledge Management Environment

ESDC's current KM environment consists of five major tools, all of which are in scope to be migrated to the new solution. The technical details of the individual KM tools are detailed in Appendix J – Technical Details of Individual KM Tools.

a. **EI ORT** | The EI Online Reference Tool (EI ORT) is a web tool that provides EI processing officers with access to information needed to process EI claims. It contains 32,000 files that are managed by 40 support resources, serving 3,200 end users.

b. **CRT** | The Common Reference Tool (CRT) is a web tool that contains procedures for Employees from various ESDC contact centres, including EI and pensions. It contains 3,300 files that are managed by 31 support resources, serving 6,200 end users.

c. **IMPACT** | IMPACT is a knowledge repository and service delivery tool to guide and enable a variety of front-line officers in the provisioning of information to the public. Although it's used by in-person officers, the information within covers all of Service Canada's statutory benefit programs. It contains 3,700 files that are managed by 41 support resources, serving 3,258 end users.

d. **IOM / IRT** | The Integrity Operations Manual (IOM) and Interactive Reference Tool (IRT) together form the Integrity Services Branch knowledge base. The tools cover procedural instructions as well as information about the EI and pensions programs. They contain 400 files that are managed by 3 total number of support resources, serving 2,000 end users.

e. **KMT** | The Knowledge Management Tool (KMT) was developed to provide comprehensive, officer-centered, and efficient web-based information to pensions processing officers. It contains 5,000 files and that are managed by 26 support resources, serving 1,000 end users.

Although the five major tools are used by different Employee groups, the program subject matter they cover overlaps. For example:

a. **EI ORT** covers EI only

b. **KMT** covers pensions (CPP/OAS) only

c. **CRT, IMPACT and IOM/IRT** cover both EI and pensions

KM TOOL		EI ORT	CRT	IMPACT	IOM/IRT	KMT
TECHNOLOGY		HTML-based web tool	HTML-based web tool	Database Solution	PowerPoint and SharePoint	Microsoft Dynamics
CHANNEL		Processing	Specialized Call Centres	In-Person	Integrity	Processing
PROGRAM	EI	✓	✓	✓	✓	
	CPP		✓	✓	✓	✓
	OAS		✓	✓	✓	✓

The fragmented landscape presents several issues:

a. **Inconsistent Client Advice**: Clients receive conflicting answers depending on the channel they use, as tools are updated at different frequencies and often conflict.

b. **Staff Inefficiencies**: Staff face challenges learning multiple tools when switching roles or channels, creating inefficiencies, and increasing training requirements.

c. **Scalability Risks**: Many of the tools are built on aging technologies or those not suited for large user bases. Scaling has become an issue with users experiencing sluggish response times. The move to an omni-channel service delivery model will enable efficient scalability with limited impact to the users.

3.2 Key aspects of the historical context in the KM space include:

a. **AI pilot findings:** AI pilots have demonstrated the importance of robust, centralized data for effective search functionality, reinforcing the need for a single source of truth. The two pilots proved that AI could help with:

   i. Search of the knowledge database, and

   ii. The consolidation of knowledge articles into a single source of truth.

b. The findings of these pilots should be leveraged in the implementation of the AI components. All pertaining documents will be available on our collaborative SharePoint space.

3.3 Drivers for a centralized Knowledge Management Solution

ESDC is looking to deploy a centralized KM solution for the core Programs (CPP, OAS, EI) aligned with the following key business drivers for a single KM solution:

a. **Improved Client and Employee Experiences**

   i. A single source of truth ensures consistent, accurate, and up-to-date information for all users.

   ii. Eliminate the need to switch tools for different roles and reduces training time.

   iii. Built and architected for the planned user load, thereby decreasing load times for all users.

b. **Efficiency and Cost Optimization**

i. Consolidating KM into a single solution will reduce redundancy, minimize errors, and streamline file maintenance. With more than 140 employees managing five tools, a unified system decreases overhead, eliminates duplication, and could cut costs, and in the process, increase the quality-of-service delivery and productivity.

ii. AI enabled search will allow service officers to more quickly and easily find and read content.

c. **Business Process**

i. Integrated information architecture and taxonomy that could be reused across ESDC programs in all channels.

ii. Standardized and consistent functional guidance across programs and business lines.

d. **Scalability**

i. A centralized KM solution that easily handles large volumes of data and can grow with the organization as we onboard new programs.

e. **Technology**

i. Integrated channel experience with enhanced digital presence and common tools/technology across channels.

ii. Leverages artificial intelligence (AI) and emerging technologies to improve service delivery.

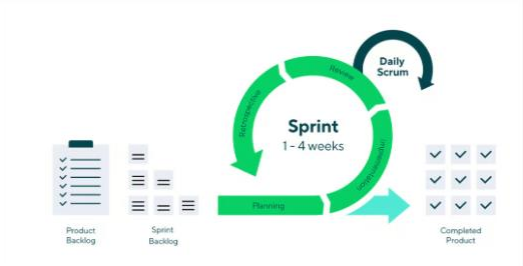
3.4 Methodology

The KM Initiative must be delivered with the Agile methodology. This approach will heavily leverage User Stories. ESDC has provided the business requirements as part of Appendix B - KM Tool Business Requirements. As a starting point, ESDC will provide some draft User Stories related to the KM solution only. The Contractor could use this as a starting point and must proceed to refine/recreate and finalize these drafts as well as identify and develop new User Stories for the KM solution, its AI enabled components (WP-02), and those related to Data Migration and Consolidation (WP-03). The Contractor must, throughout WP-01 Business Readiness and Design, work with ESDC to identify gaps, develop, and refine the User Stories.

The review and approval of the User Stories and all other phases of project delivery must follow the Agile project delivery

A high-level illustration of the proposed Agile/Scrum methodology

Source : https://www.wrike.com/agile-guide/agile-development-life-cycle/



4 Assumptions and Constraints

4.1 Assumptions:

a. All work can be done remotely unless otherwise agreed to by the Project Authority (or designated representative).

c. The Contractor must organize the Work on the various activities outlined in the TA.

d. The Contractor must provide resources with the appropriate knowledge, both functional and technical as described in this TA, and the resource levels described in the Master System Integrator Contract (MSIC).

4.2 Constraints:

a. The Contractor must provide all document deliverables in Microsoft Office Suite (2010 compatible) on ESDC's templates or a similar editable format (including visuals and diagrams).

b. The Contractor must use ADO for all phases of application planning, design, development and deployment and ensure that the information is updated to assist in timely and accurate tracking and reporting.

c. The Contractor must use collaboration sites approved by the Project Authority (or designated representative), for collaboration and to store all KM related products or artifacts, whether in progress, in draft or final.

d. The Contractor must leverage existing ESDC documentation, and all materials previously developed, avoiding duplication. All documents will be saved in the Collaboration Space before the Contractor is onboarded.

e. The Contractor must integrate the Information and Communications Technology (ICT) provided by Canada in accordance with the EN 301 549 as specified in writing by the Technical Authority.

5 Scope

5.1 Knowledge Management Solution

The Contractor must plan, design, develop, implement and support an AI enabled, centralized KM solution, replacing the tools listed in **3.1 ESDC’s Current Knowledge Management Environment**, including the migration and transformation of the knowledge currently stored in the identified legacy solutions to this new centralized one.

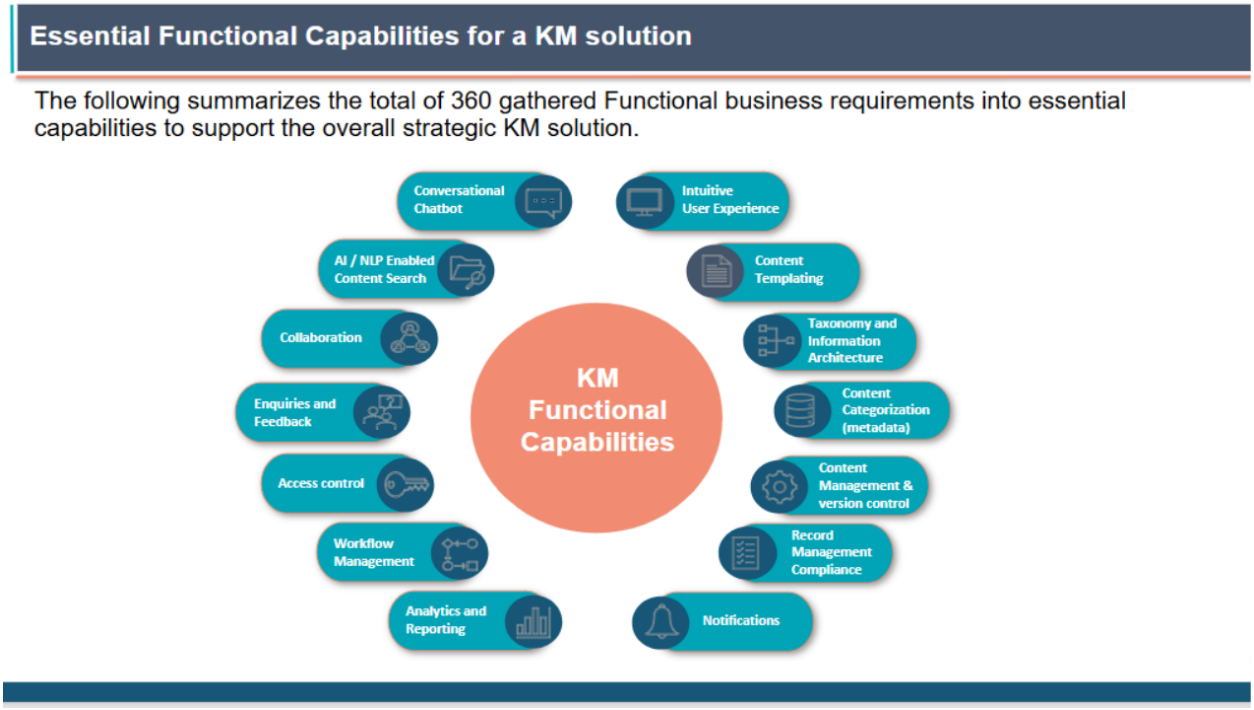
The KM solution must be designed with the capability to scale, enabling it to accommodate both internal and external clients, as it evolves in the future.

The BDM Service Delivery Hub (SDH) and Service Delivery Network (SDN) have completed some foundational work in preparation for this TA. All existing documentation from these TAs will be shared with the Contractor and will be available in the Collaboration Space.

The Contractor must leverage this work, as applicable, in the execution of their obligations. ESDC will provide the Contractor with full access to all relevant information.

The functional and non-functional requirements are detailed in Appendix B - KM Tool Business requirements.

Illustrated below are the capabilities for the proposed KM solution:



6 Work packages: Tasks, Activities, Approach and Acceptance Criteria

The tasks and activities that the Contractor must deliver in the execution of the Work have been bundled into Work Packages (WP).

WP #	**WP Name**
WP-01	Business Readiness and Design
WP-02	Development and AI Enablement
WP-03	Data Migration and Consolidation
WP-04	Change Management (CM)
WP-05	Release Management and Transition Out
WP-06	Project Management and Governance

WP-01 Business Readiness and Design must be completed before initiating work on WP-02 Development and AI Enablement, and WP-03 Data Migration and Consolidation. While WP-02 and WP-

03 can proceed in parallel, they can only commence once the critical documentation, architecture, and decisions outlined in WP-01 have been finalized.

All other work packages will commence upon project initiation and will conclude upon the handoff to the operational group at the project's end. The Contractor must refine the project schedule once the Task Authorization has been awarded.

WP-01 is focused on delivering architectures, frameworks, standards and documents, with updates on these deliverables to be included in WP-06 once completed. The current estimated time to complete WP-01 is approximately four to six months; however, this is an estimate and should be revisited and refined by the Contractor upon Task Authorization award.

WP-02 and WP-03 are not time-boxed, except that they must commence only after the completion of WP-01. Although these WPs can be completed earlier, the maximum allowable timeframe for finalizing all activities within all releases, including the post stabilization period extends only to the last quarter of fiscal year 2028-2029.

WP-04, WP-05, and WP-06 are ongoing project support activities. These WPs should be considered as fixed-team, fixed-cost WPs, with team sizes estimated based on the descriptions provided in this SOW and the deliverables identified in Appendix F – KM Deliverables.

Refer to section 6.7 for Acceptance Criteria.

6.1 WP-01 Business Readiness and Design

The Business Readiness and Design WP establishes the foundational activities required for the development and delivery of an AI-enabled, centralized KM solution. The Contractor must propose a Minimum Viable Product (MVP) approach along with an implementation timeline, anticipating completion of this Work Package within an estimated duration of four (4) to six (6) months from the commencement date, subject to mutual agreement between ESDC and the Contractor, as well as any necessary adjustments outlined in the project schedule or Change Management (CM) process.

The Contractor is required to collaborate with ESDC to develop a delivery approach and methodology for the KM solution and its AI capabilities. This collaboration includes reviewing the draft User Stories for the centralized KM solution and finalizing them in partnership with ESDC. The Contractor will generate all User Stories pertaining to the selected AI enablement and Data Migration and Consolidation and address any remaining outstanding User Stories for the centralized KM solution. Furthermore, the Contractor must review proposed AI capabilities and recommend additional or alternative developmental approaches for AI enablement within the KM solution. The Contractor must conduct research and analysis to confirm that the identified AI enablement's deliver the greatest value for money for Canada, while facilitating the substitution of any lower-value AI enablement's with higher-value options discovered during the evaluation process.

Business Readiness

The Contractor must also design the overall solution and user interface (UI) in accordance with all defined business requirements, encompassing both the KM solution and its AI capabilities. This includes architecting the necessary infrastructure to implement AI-driven functionalities that will enhance and streamline KM practices across the organization, as outlined in WP-02 Development and AI Enablement. As a starting point, the Contractor must adhere to, at a minimum, the release schedule specified in Appendix N - Proposed Migration Roadmap. Earlier delivery of milestones is permitted and encouraged, provided it does not compromise quality or coordination requirements. The roadmap is a recommendation from ESDC; the Contractor may optimize the plan, subject to review and approval by

ESDC. However, the final release and post-deployment stabilization period must not extend beyond March 2029. The Contractor must make reasonable efforts to compress the delivery schedule where feasible, without compromising quality or compliance. A revised Migration Roadmap must be identified following ESDC's review and approval. All work must be completed no later than the latest timelines set forth in Appendix N - Proposed Migration Roadmap, and the Contractor must collaborate with ESDC to review and, if necessary, update the delivery schedule during the project planning phase.

6.1.1 Draft Requirements Traceability Matrix (WP-01.01)

The Contractor must develop and maintain a Draft Requirements Traceability Matrix to ensure that all User Stories created in ADO are:

a. Traced back to the requirements identified;

b. Traced to test cases;

c. Linked to Features and Epics; and

d. Indicate the applicable dependencies and relationships between User Stories or Features.

The Contractor must build Requirements Traceability queries in ADO to enable the ability to view information such as all User Stories, User Stories for each Feature, and identify orphan User Stories.

The Contractor must ensure that the Draft Requirements Traceability Matrix is always up to date, as part of the Ongoing Project Management Activities, WP-06.10.

6.1.2 User Stories Creation (KM Solution, AI Enablement and Data Migration) (WP-01.02)

6.1.2.1 User Stories creation, refinement, and mapping

The Contractor must create User Stories in Azure DevOps (ADO) to document and define functional requirements. User Stories must adhere to the ESDC templates and standards (Appendix I – User Story Template) and must provide a step-by-step process of the user interaction with the system. This process must be Agile/Scrum, and all the User Stories must be reviewed, refined, and approved within the Work Package, and a prioritized Backlog created in ADO.

The Contractor alongside ESDC must estimate the Value Points needed to complete each User Story.

The Contractor must develop a User Story map to organize and prioritize User Stories. The User Story map must align with the KM solution and AI capabilities requirements and must define the structure of the Backlog.

The Contractor must:

a. Define a review and refinement process for User Stories.

b. Develop a timeline for development and refinement of User Stories in collaboration with ESDC.

c. Track the velocity/progress of User Stories.

d. Implement required templates in ADO. Refer to Appendix I – User Story Template.

    i. The Contractor must consult with ESDC to determine whether the initial drafts of User Stories will be created in MS word first or directly within ADO, to capture the comments and facilitate the different review cycles with the stakeholders. They must be tracked and approved in ADO.

e. Provide continuous prioritization and grooming of the Backlog in various releases as agreed upon with ESDC and described in the User Story map.

f. Use the requirements to review and update the User Stories for the KM solution; ESDC will provide some draft user stories to the Contractor at the time of onboarding as a starting point.

g. Identify AI requirements and develop AI specific User Stories based on the final approved AI capabilities chosen.

h. Identify data migration requirements and develop data migration specific User Stories.

i. Lead the initial Value Point estimation for each User Story in accordance with the process outlined in Appendix C – Agile Procurement with Value Points. The Contractor alongside ESDC must estimate the Value Points needed to complete each User Story.

j. Lead the elaboration process including requesting supporting resources and Subject Matter Experts (SME) from ESDC, as required.

    i. Note that completion requires that User Stories have been reviewed and approved by ESDC within agreed upon timelines in accordance with the process described in Appendix C - Agile Procurement with Value Points.

k. Manage and ensure quality and consistency across all User Stories.

l. Review User Story feedback with ESDC, identifying areas for change and elaboration and address all feedback with justification for action/inaction.

m. Submit reviewed User Stories for formal review and approval by ESDC.

n. Create the User Story map, transposing all existing requirements and processes into a standardized Epic/Feature/User Story structure (User Stories at the “title” level of detail).

o. Identify codification criterion and codify the User Story map to indicate in or out of scope and priorities relative to the KM solution scope, and map in-scope items to the proposed planned releases.

p. Create and/or update a prioritized Backlog of User Stories for development in ADO aligned with the KM solution release strategy.

q. Create and/or update a prioritized Backlog of User Stories for development aligned with the AI capabilities and data migration, release strategies, and defined priorities.

r. Recognize that this is a collaborative process. The User Story responsibilities and support matrix, clearly identifying the responsibilities of the Contractor and ESDC, must be established during the Planning Phase. This matrix defines the engagement model and process for completing User Stories including required inputs, reviews, and approvals, please refer to section 6.1.2.2.

Note: Rationale for decisions or changes discussed through comments in the User Story in ADO must be documented under Acceptance Criteria for the User Story and not left solely under the Discussion section. In addition, the User Stories must always be kept up-to-date and current (both content and status).

The table below describes the activities the Contractor must lead in collaboration with ESDC for User Story development. These activities are not meant to represent a linear process and are expected to be iterative and cyclical, and a given activity will not be undertaken in a cycle unless the User Story has achieved the appropriate state for that activity. The table also applies to gaps found in User Stories. If there are any additional gaps found in the User Stories, the work and effort must be tracked in WP-06 Project Management and Governance.

Focus Area	Activity	Description	Type of Collaboration
Review and Refine Backlog	Review and refine User Story inventory and identify priorities and timelines with the Work Package.	Ensure the User Story inventory is continually up to date as new User Stories are identified, as priorities are adjusted, or as User Story refinement results in better understanding of complexity rating, and value points.	Workshop at project initiation and on-going, as needed based on results of User Story refinement within the agreed-upon scope of work.
User Story Refinement	Refine story and acceptance criteria for User Stories	Review and refine the details of the User Stories (including those created as 80% initial DRAFT, if needed, as well as new User Stories identified and created throughout the refinement processes) and if needed, provide further acceptance criteria, clarity, or specifications and/or create new User Stories as needed for developers to implement the User Story	Workshops
New Requirements Gathering	Detailed research	During User Story refinement, where it is determined that requirements or acceptance criteria are missing or lacking clarity, review and analyze available documentation related to the User Story (including related User Stories, process maps,	Workshop and/or sub-work group. Individual assignments may be given to ESDC resources when appropriate to bring information back to a working group.

		rules, and previously gathered KM requirements) and leverage SMEs for additional input as needed.	
New User Story Definition	Create User Story	When new User Stories are identified, create a short simple description of the User Story, which includes a new capability as well as the necessary acceptance criteria and additional relevant pieces of information to support the development of the User Story.	Workshop or assign to ESDC resource or subgroup.
User Story Design	Add design details and validate high-level complexity estimate.	Review acceptance criteria and begin design workshops for the User Story, updating the User Story as appropriate with design details and creation of Functional Design Documentation (FDD). It is during the design details workshops that many of the optional item's section of the User Story will be populated. Note: while this activity is specifically designated for User Story design, it is anticipated that some design details may be documented (including options items in the User Story) if the information comes up during User Story refinement sessions. Where User Stories already have some design content documented, this process includes the review and refinement of any already	Workshop and individual assignments as appropriate.

		documented design content. Validate the complexity estimate and update as appropriate based on the additional information provided together with KM expert(s). ESDC must agree on a fixed duration early on.	
Validation and Approval	Approve or reject whether User Stories are ready to be sent for sign-off.	Validation occurs prior to User Story design. Following the award of this TA the User Story inventory will be reviewed and approved. Deliver a User Story package to key ESDC stakeholders as User Stories within a feature are determined to be ready for approval. To be able to ensure the User Stories meet the required user outcomes and adequately address the requirements, they must be reviewed in groups per feature.	ESDC stakeholders.
Sign-Off	Sign -off or reject User Stories	Sign-off that the User Story is ready for design / development activities, and that no further changes to the User Stories will occur without a formal change process.	Approval Authority

During the User Story documentation process, the Contractor must follow the ways of working defined by ESDC per above and as follows. The Contractor must manage the workshops and requirements documentation process at the feature level to enable ESDC to talk holistically about the feature. The Contractor must capture appropriate details and acceptance criteria at the feature level, so no requirements and/or acceptance criteria are added when breaking it up into "manageable chunks" for User Stories. This process will avoid challenges that occur when looking at requirements and acceptance

criteria in isolation of very granular individual User Stories which does not allow for thorough thinking and discussion of the business needs.

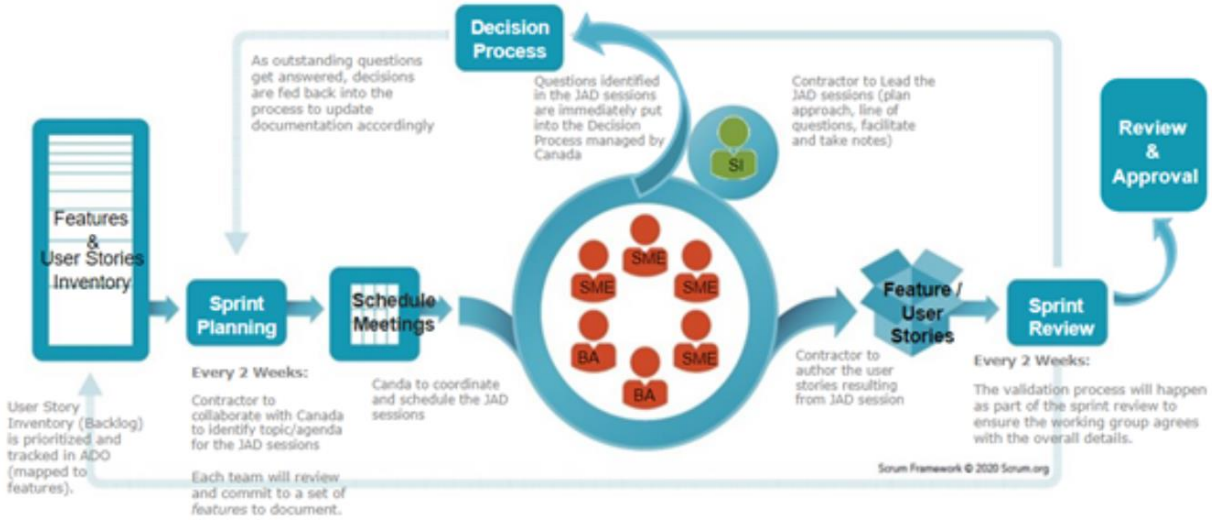
a. The Contractor must map User Stories, Features, Epics and departmental capabilities and maintain traceability in the User Story inventory.

b. The Contractor must map KM requirements to User Stories or Features and maintain traceability.

c. The Contractor must manage the User Story inventory (Backlog) in ADO with only titles to facilitate managing priorities, progress, User Story state, and traceability. The User Stories must adhere to the templates provided by ESDC.

d. Once User Stories within a given Feature have been given approval, the Contractor must transfer the Feature and related User Stories content into ADO with a status of approved.

The image below provides an overview of the cyclical process for User Story creation and the strong collaboration required between the Contractor and ESDC.



6.1.2.2 Responsibility and Support (RS) Matrix and Approval Process

Project phases related to User Story identification and development, and the various activities required to complete this Work, are documented in the RS matrix below.

Minor changes made to a User Story that was previously approved can be addressed with a simple approval from ESDC. If a fundamental shift occurs in what was originally defined, the Work item must be returned to the Backlog for re-prioritization and validation of the new changes.

ESDC has defined a robust team of resources with a variety of skills and background appropriately aligned to the needs of the KM team and stakeholders to collaborate with the Contractor on the User Stories. It is expected that the ESDC resources will be embedded in the Contractor's processes to evolve and refine the content of User Stories and detailed designs. While the Contractor is responsible for the creation of the documentation, it is expected that ESDC will be fully embedded in the processes so that ESDC can be appropriately leveraged not only for the content of the User Stories, but so that ESDC can have insight into the documentation throughout the process.

While the validation and approval must be done by ESDC, the working groups creating the User Stories must complete their cycles of review that are embedded in the User Story creation sprint and the working group will only send User Stories for validation and approval when the working group agrees it is complete. Approval must only be given once all related User Stories for a feature have been completed and delivered to the approval team. Both ESDC and the Contractor must do a final review of all User Stories in the Feature to ensure alignment within the Feature and to ensure there are no gaps in acceptance criteria or missing User Stories for the Feature.

Individual User Stories can be sent to the approval team for review and validation to expedite the process, however approval requires that a complete User Story package be delivered per the established timeframes as follows:

a. Package for review must include all the User Stories for a given Feature;

b. Package must also include any additional supporting documentation for the User Stories (if additional documentation was created);

c. ESDC will not accept incomplete “packages” for approval; and

d. Package must be documented in Microsoft Office Suite (2010 compatible) or any other agreed upon format.

The RS Matrix has been broken down based on the activities described above in this section. While ESDC is shown as “S” for many of these activities, it is expected that ESDC is a fully embedded and active participant in nearly all activities and the “S” designation incorporates the Supporting, Consulted, and Informed roles of a classic RASCI (*Responsible, Accountable, Supports, Consulted, Informed*) model.

Activity	**Contractor**	ESDC
Review and refine User Story inventory and identify priorities and timelines	R/A	S
Refine User Story & acceptance criteria for User Stories	R/A	S
Detailed research	R/A	S
Create User Story	R/A	S
Add Design Details and Validate high-level complexity estimate	R/A	S
Quality Assurance (QA) process to determine completeness	R/A	S
Approve or reject whether User Stories are ready to be sent for sign-off	S	R/A
Sign -off / Reject User Stories	S	R/A

6.1.3 KM Solution Migration Strategy and Roadmap (WP-01.03)

The Contractor must define and lead the migration strategy from a decentralized solution to a centralized KM solution. This includes end to end implementation with defined scope, timelines and delivery

approach and methodology for the MVP and each of the following releases, and the list of potential areas for application of AI enablement.

6.1.4 KM Operational Model (WP-01.04) and Frameworks and Processes (WP-01.05)

The Contractor must define and develop a KM future state operational model including the definition of KM solution staff, operational KM processes and procedures, KM content development process and information management lifecycle. The future state operational model must establish how KM programs operate to address current gaps in expertise and knowledge around leading industry practices related to KM. An operating model for KM must be developed to ensure ESDC can support its operational staff through transition to BDM and into the future of service delivery. The model must outline the functional roles required for KM, processes used to operate, update, and maintain the KM system and must include a plan to integrate the model as part of the larger work on future state organizational design.

The following frameworks must be developed by the Contractor:

a. A defined framework for content lifecycle;

b. A defined framework and processes for the design, development, testing and deployment phases; and

c. A defined framework for AI integration

6.1.5 Solution Requirements

6.1.5.1 Functional Requirements

All functional requirements have been detailed in Appendix B - KM Tool Business Requirements.

Any additional functional requirements identified during the Joint Application Development (JAD) sessions or by ESDC business clients will be added to Appendix B - KM Tool Business Requirements through a TA amendment.

6.1.5.2 AI Enablement Requirements (WP-01.14)

The Contractor is tasked with gathering requirements for all AI capabilities to be deployed and identifying AI opportunities as detailed below. The Contractor must:

a. Work with ESDC to identify, evaluate, and document AI capabilities for future implementations that can be leveraged within the KM solution to improve user experience and deliver value.

b. Provide a recommendation on two additional AI-enabled capabilities that would produce maximum value for ESDC within the context of knowledge management.

c. Gather detailed requirements for the three identified capabilities and potentially any two additional AI capabilities. The three suggested are listed below and the additional two will be recommended by the Contractor:

   i. **AI Search** - Use of AI technologies to enhance the process of finding and retrieving information.

   ii. **AI Content Assistant** - An AI-powered tool to support content creators in maintaining, editing, and generating new content. Features include:

   - Assisted content editing
   - Content drafting

- Style and quality checks
- Automated metadata tagging
- Content gap identification

iii. **AI for Content Consolidation** - Use of AI for content migration, identifying duplication, and standardizing content.

6.1.5.3 Data Migration and Consolidation Requirements

All the data migration and consolidation requirements have been detailed in the WP-03 Data Migration and Consolidation.

6.1.5.4 Non-Functional Requirements

Non-functional requirements define how well the application will support the functions, and include data, content, report, security, and quality (reliability, usability, flexibility, and performance) requirements. The Contractor must ensure that the non-functional requirements are met, including the ones outlined in the following annexes:

Appendix B – KM Tool Business Requirements (including performance aspects)

Appendix D – ICT Accessibility Requirements

ICT Accessibility Conformance *Requirements*

In support of the Accessible Canada Act and the Accessible Canada Regulations, the following details the ICT Accessibility Conformance Requirements for ESDC. Appendix D - ICT Accessibility Requirement provides specifications and guidance that complement these requirements.

a. **Accessibility standards to meet:** The Contractor must ensure that all work conforms with ESDC accessibility standards prior to operation as well as any future regulations or directives issued during the term. ESDC accessibility standards, compliance or conformance here mean meeting the following standards:

Standard	**ICT products and services**
Harmonised European Standard (EN) 301 549 v 3.2.1 (2021-03) including WCAG 2.1Level AA	ALL (voice and video communication, hardware, web, non-web documents, software (including native mobile application), documentation and support services and other ICT)
WCAG 2.2 Level A, AA	Web (desktop, tablet, mobile) – public facing only
Government of Canada web standards: GC Design System and Canada.ca Design system including Information Architecture Specifications and Canada.ca Content Style Guide	Web (desktop, tablet, mobile) – public facing only

b. **Accessibility conformance for all product features**. The Contractor must configure an accessible product. Product features include but are not limited to the web-based knowledge management (KM) workspace, administrative interfaces, AI-driven modules (e.g., Copilot), chatbots, analytics and reporting interfaces, product documentation and support services, authoring tools, training portals, audio and video content, and other non-web documents provided within the solution.

c. **Embedding Accessibility in the Software Development Lifecycle (SDLC).** The Contractor must ensure accessibility is integrated across all phases of the SDLC. Sprint and release planning artifacts detailed in Appendix D - ICT Accessibility Requirement [D1] must incorporate accessibility. IT Accessibility Office in ESDC (ESDC-ITAO) to receive a copy of these documents [D1]
d. **Accessibility testing**. The Contractor must conduct accessibility testing during both the development and regression testing phases. The process must include creating accessibility test cases, documenting and reporting accessibility defects, tracking their status and resolution due dates, and verifying the resolution of reported defects. The accessibility testing team must have relevant experience testing large, complex, dynamic web applications and sufficient capacity to meet project release timelines. The Contractor must follow the specs detailed in Appendix D - ICT Accessibility Requirement [D.2]
e. **User-based accessibility testing**. The Contractor should conduct user-based accessibility testing with individuals with disabilities prior to or in parallel with the User Acceptance Testing (UAT) phase following specifications in Appendix D - ICT Accessibility Requirement [D3]
f. **Management of accessibility defects.** The Contractor must triage all accessibility defects raised by the Contractor's testing and by ESDC-ITAO, directing each item to the Contractor's development team or to the appropriate vendor (including the platform provider and any third-party sellers used in development) for resolution. Application-related accessibility defects within the contractor's control must be resolved before the scheduled release date, and platform/vendor defects must be actively managed to ensure timely resolution and accessibility conformance before release; the Contractor is solely responsible for any upgrades, updates, subcontracting, or other work required to achieve conformance to the specified accessibility requirements at no additional cost to Canada. All accessibility defects must be documented and categorized by severity as defined in Appendix D - ICT Accessibility Requirement [D.4]
g. **Enable ESDC-ITAO engagement and audit.** The Contractor must ensure early and continuous involvement of ESDC-ITAO throughout the project lifecycle and facilitate their accessibility audit activities. The Contractor must submit to ESDC-ITAO all test cases and test results in the format specified in Appendix D - ICT Accessibility Requirement and must promptly address any ESDC-ITAO feedback on gaps in their accessibility testing methods. *Note:* ESDC-ITAO audit activities include ongoing reviews of the contractor's accessibility testing results during development and regression testing cycles, as well as an audit of a representative sample of the product prior to launch. Details on activities for Contractor to take are specified in Appendix D - ICT Accessibility Requirement [D.5]
h. **Training and documentation.** The Contractor must ensure all training materials and delivery methods are accessible, support diverse learning needs, and provide required accommodations and complaint resolution processes (including interim measures approved by the Technical Authority) to ensure full and equal participation.

Security
The data/solution security classification is Protected B. The Contractor must complete all the security governance processes.

6.1.6 Design

The Contractor must design the solution and user interface (UI), in accordance with all business requirements. This includes both the KM solution, its AI enablement and Data Migration and Consolidation activities. Additionally, the Contractor must design the architecture required to implement AI-driven capabilities that will enhance and streamline KM practices across the organization, as outlined

in WP-01. The Contractor must adhere to at a minimum the release schedule specified in Appendix N - Proposed Migration Roadmap, though earlier deliver where possible will be accepted. The Contractor must make reasonable efforts to optimize and, where feasible, compress the delivery schedule without compromising quality or compliance with requirements. The work must be completed no later than the timeline set out in Appendix N – Proposed Migration Roadmap. The delivery schedule must be reviewed and, if appropriate, updated by the Contractor in collaboration with ESDC as part of the project planning phase.

The Contractor must define conceptual technical architecture, information architecture, integration framework, and technology enablement functions for delivery; and must perform the following, in collaboration with ESDC, aligning to the project guiding principles:

a. Design and iterate with users: Engage end users to configure and develop their tools in a way that makes sense to them and supports the Work they do;

b. Align horizontally with strategic partners to ensure the KM initiative is one component of a larger transformation effort. Bringing in strategic partners at the right time and in the right capacity will create shared success;

c. Build the solutions with consideration of the data, functionalities, and processes that are common to all programs, along with their respective tools;

d. Ensure that application programming interfaces (API's) are created to facilitate integration of solutions as identified in Appendix M - Proposed Architecture with Integration Points;

e. Ensure implementation aligns to the BDM blueprint/architecture;

f. Continuously validate safeguards: Business continuity is of paramount importance. Safety measures are established at procurement and maintained through migration, transformation and beyond;

g. Designed and configured the solutions to meet current and future demands and ensure the consistent delivery of high-quality service while enhancing the overall service and employee experience;

h. Seamless transition to operations: ESDC will be well-positioned to manage the KM solution post-migration; and

i. Adhere to Government of Canada directives governing accessibility, privacy, and responsible use of AI principles.

6.1.6.1 Design specifications (WP-01.06)

This includes the KM solution and AI capabilities, when considering the following:

a. Conduct fit gap activities against business requirements, initial product Backlog, and processes; to identify preliminary interface components;

b. Conduct assessment and evaluation of consolidating the various knowledge bases/articles and the methodology and approach for this consolidation;

c. Identify and define the potential utilization of AI for this consolidation.

d. Conduct joint application development (JAD) sessions with ESDC to refine the detailed design requirements, preview designs, and design option;

e. Create a conceptual design to identify the key KM solution functional components and other components to be used, and an overview of how they work together;

f. Develop specifications, frameworks and guidelines for programming code requirements, standards, and protocols;

g. Create and develop the knowledge bases/repository design;

h. Define the process for knowledge capture, storage, sharing and retrieval;

i. Create the knowledge articles templates;

j. Configure business rules and policies;

k. Identify and develop any interfaces and integrations required to satisfy the integration points required. Potential integration points have been identified in Appendix M - Proposed Architecture with Integration Points;

l. Define and develop reports and workflows;

m. Align design specifications for all the capabilities (see Section 5.1) as per the requirements in Appendix B - KM Tool Business requirements, including a comprehensive search functionality. Develop the metadata standards and categorization for search;

n. Identify and integrate any other BDM system components required to satisfy the requirements;

o. Identify and develop strategies for future scalability and enhancements; and

p. Incorporate (merge) the outcomes of testing activities including regression tests, and ensure all fixes are made to KM solutions prior to each release go-live.

6.1.6.2 UI Design (WP-01.07)

When designing and building the UI, the Contractor must comply with the Official Languages Act (OLA) and policies, respect the single sign in functionality, customize the UI experience and respect UI design standards, as well as the applicable non-functional requirements noted in this document.

6.1.6.3 Functional and Technical Design Specifications

Create detailed design specifications; components as specified by the detailed requirements including the following:

a. Detailed functional design specifications (WP-01.08): a detailed document that outlines the functional requirements and behavior of a system, software, or product before development begins. It acts as a blueprint for developers, ensuring they understand what the system needs to do from a user's perspective, not necessarily how it will be implemented.
b. Detailed technical design specifications (WP-01.09): A technical design specification is a comprehensive document that outlines the technical details of a product, system, or project, serving as a roadmap for its development and implementation. It details the technical requirements, design choices, and implementation guidelines, ensuring everyone involved understands the technical aspects of the project. This document is crucial for bridging the gap between business requirements and technical execution, minimizing misunderstandings and potential errors during development.

6.1.6.4 Blueprint and Other Architecture Aspects (WP-01.10)

There are other aspects of the architecture and design that the Contractor must design and document. The Contractor must define the following:

a. Blueprint (architecture, component and environments);

b. Data flows;

c. Communication protocols; and

d. Any application interfaces. Please refer to Appendix M - Proposed Architecture with Integration Points for future potential interfaces.

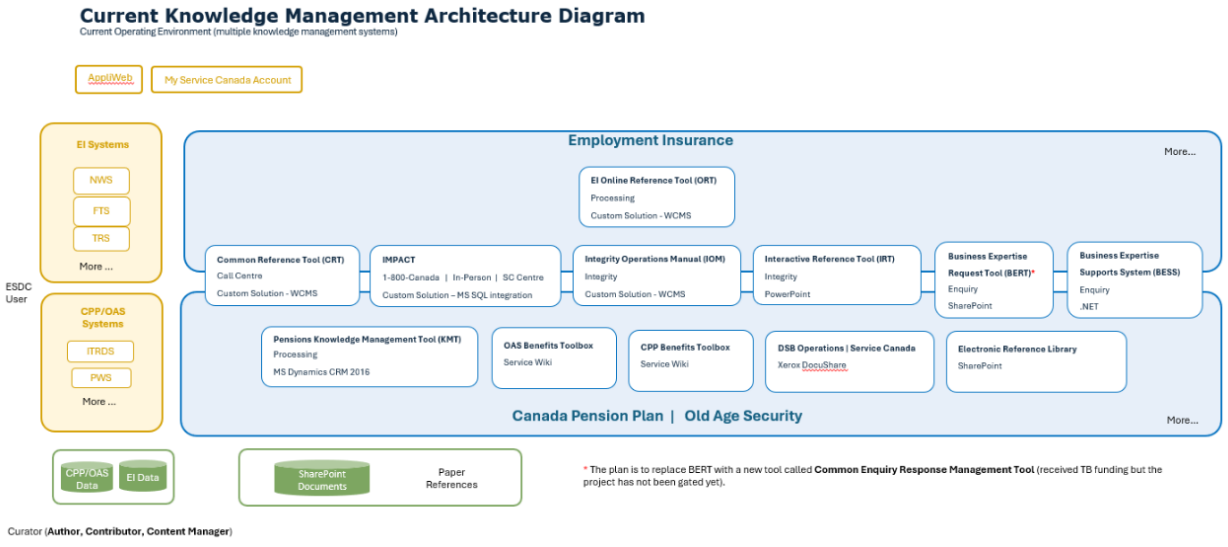
6.1.6.5 Solution Architecture (WP-01.11)

Upon reviewing the existing architecture, if the need arises, the Contractor must collaborate with ESDC to update the previous vision/architecture.

Decisions related to architecture that could impact the larger BDM Programme will go through the BDM Design Authority to the appropriate authority within the BDM Programme. The Contractor must provide key architecture, data maps, and business process artefacts to the authority within the BDM Programme early in the development of the detailed design. Depending on the nature of certain components, design documents may also be provided to the authority within the BDM Programme for review.

The Contractor must ensure that the technology and solution governance process, confirmed during Project Planning, are adhered. The Contractor must, at no cost to ESDC, remediate any Work which is not conducted in accordance with a design approved by technology and solution governance in accordance with this section.

Illustrated below is the current Architecture diagram:



6.1.6.6 KM Information Architecture (WP – 01.12)

The Contractor must create a detailed workbook framing out the current state content inventory from the various tool/channels. The content inventory must be a list of all current content, and the list must identify the:

a. Source (text description and URL);

b. Topic;

c. Title;

d. Format – e.g. text, diagram, flow chart, picture, form, audio, video etc.;

e. Content type(s) - e.g. contextual, procedural, referential, glossary, troubleshooting;

f. Date published, modified;

g. Tags; and

h. Word count.

The Contractor must create a detailed analysis and audit of the current state content inventory. The Contractor must then further refine the content inventory to include:

a. Identification of duplicate content - entire article or excerpt, either within channel or across channels;

b. Identification of knowledge gaps across inventory;

c. Content topic(s) and create topic list;

d. Content types from existing structures and their links to the new proposed future state KM content structure;

e. Content requiring revision due to Cúram implementation;

f. Readability Assessment;

g. Summary; and

h. Target audience/role/level (from metadata – e.g. L1 processing, L2 call center, All levels).

The Contractor must create the future state omni-channel KM information architecture which includes creating the structure and orderly principles to organize information. This first iteration will serve as a beacon, setting the stage for future iterations of this model as ESDC onboards future content and programs. The Contractor must:

a. Define the KM Taxonomy by grouping, organising and categorize information and content in an effective sustainable and scalable approach;

b. Consider user profiles to label content and information, creating a relationship between the user and the content. Ensuring consistency in design by standardizing labeling conventions;

c. Design user flows, site maps and navigation defining the journey for the various user roles including entry points, actions, decision points, end points;

d. Define the future state content model/architecture by organizing and structuring content with the arrangement, classification, and presentation of content components and required templates to ensure a cohesive and seamless user experience. Identify how the existing content from the current channel/systems will be transformed to fit into the new model;

e. Create site map of a high-level future state omni-channel overarching organizational chart that illustrates the taxonomies, categorical groupings, information relationships, and hierarchy of the future state KM content structure; and

f. Apply various research methods such as tree jack and card sorting exercise and/or user interviews to assess the findability of content and how the target audience thinks, feels, and understands the information presented to them.

6.1.6.7 Extended Data Catalogue (WP – 01.13)

The Contractor must create a catalogue listing the data and KM articles contained within the tools in scope (KMT/ORT/IMACT/IOM/IRT). This catalogue will eventually inform the information architecture and migration deliverables.

Official Languages

The Contractor is required to comply with the OLA and ensure adherence to Government of Canada (GoC) standards, policies, directives, and other relevant regulations.

Specifically, ESDC will:

a. Provide ESDC programme specific terminology for both English and French UI as part of the detail design activities at the start of the KM Solution's implementation;

b. Translate ad hoc words or sentences; and

c. Be responsible for translating English documents into French and the Contractor is responsible for applying the translation to the Artifacts.

The Contractor must:

Configure the KM solution UI that fully support both English and French languages for the following:

a. All UI for internal users (ESDC representatives regardless of their role);

b. Implement localization, including updating labels from English to French, for all functionality in the KM solution;

c. Configure the user preferences capability for users to select the preferred language for system access and communications;

d. Configure the solution so that users can seamlessly toggle between their language of choice within the KM solution without the need to log out and log back in;

e. Prioritize accessibility and support for official languages as crucial operational consideration;

f. Ensure that the service remains accessible to all users, irrespective of their location or language preference, aiming to make the Service as effective and inclusive as possible; and

g. Ensure that when developing the artifacts and taxonomy in English, allow sufficient time in the schedule for ESDC to facilitate the translation into French.

References:

Title	URL
Directive on Official Languages for Communications and Services	https://www.tbssct.canada.ca/pol/doceng.aspx?id=26164

Single Sign-on

All service officers are members of the ESDC Microsoft Active Directory (AD). The Contractor must leverage the AD (on prem/cloud) to authenticate the users.

Customized UI experience

ESDC will implement Virtual Service Groups (VSG) as part of the EI/Workload Management (WLM) and WLM activities. The Contractor must leverage the VSG to determine the access and authorize the service officers have access and visually see content relevant to their role and the specific program (EI, CPP/OAS). must leverage the VSG to determine the access and authorize the service officers have access and visually see content relevant to their role and the specific program (EI, CPP/OAS).

If the VSGs have not been implemented, ESDC and the contractor will collaborate to define the user roles within the KM solution. Note that a user could have multiple different roles within their profile. A user's role could change at any time, and a user may not be in the same role for their entire workday. The content displayed to a user must be tailored to reflect their current role.

UI Design Standards for Consistent User Experience

To create a visually appealing and functional layout that ensures a positive, consistent, and cohesive user experience. UI design must adhere to the following established ESDC standards:

- **a.** Canada.ca Content Style Guide;
- **b.** Web Experience Toolkit (WET);
- **c.** Standard on Web Accessibility;
- **d.** Standard on Web Interoperability; and
- **e.** Standard on Web Usability

This includes but not limited to page layout, templates, typography, color scheme, navigation, icons, feedback elements (error messages, tooltips), visual hierarchy that reflect the organization's branding. Additionally, design elements must be standardized across all interfaces to maintain familiarity and ease of use for users regardless of what channel or program they work in.

6.2 WP 02 Development and AI Enablement

This WP is focused on creating a comprehensive KM solution that enhances information sharing and collaboration within the organization while integrating advanced AI capabilities to improve existing systems and processes. The Contractor is responsible for all aspects of configuration, development, testing, and bug fixes necessary for the successful implementation of the KM solution and its AI features. Specifically, the Contractor must implement AI-driven capabilities to elevate KM practices across the organization. This includes leveraging AI to automate content classification, improve knowledge discovery, enable intelligent search, and provide contextual recommendations. AI must be used to

streamline knowledge capture, reduce duplication, and ensure timely access to relevant information, thereby increasing operational efficiency and informed decision-making.

Furthermore, all AI implementations must align with Government of Canada data governance policies, directives, governing accessibility, privacy, and responsible use of AI principles and be designed to scale with evolving business needs.

This WP must be executed in accordance with the Agile method of development, leveraging the Value Points methodology as described in Appendix C – Agile Procurement with Value Points.

6.2.1 KM Solution Development (WP-02.01)

6.2.1.1 RS Matrix

The RS matrix is used to assign responsibilities and support between the Contractor and ESDC for deliverables and activities. The RS matrix incorporates the Supporting, Consulted, and Informed roles of a classic RASCI (*Responsible, Accountable, Supports, Consulted, Informed*) model.

For the purposes of this document, the full RS definition is as follows:

a. Responsible (R) - are the stakeholders completing the Work. Responsible stakeholders are the creators/authors of deliverables.

b. Support (S) - provides support resources to the Responsible (R) role. This role aids in completion of a task and identifies stakeholders who can give valuable input for tasks that are in progress. This role informs stakeholders who have no direct task involvement but require regular updates.

Activity	**Contractor**	**ESDC**
Review and refine Backlog	R/A	S
Facilitate the scrum ceremonies	R/A	S
Finalize Sprints and program increment (PI)	R/A	S
Sign off on Sprint Features	S	R/A
QA process to determine completeness	R/A	S
Approve or reject completion of development	S	R/A
Sign -off / Reject Features	S	R/A

6.2.1.2 Technical Tools

The Contractor must identify any other tools or add-ons that are required for the KM solution implementation. ESDC will provide these tools and ensure they align with the IT Branch's directives. For further information please refer to Appendix L- ESDC Approved Tools and Appendix K - SharePoint Addons.

6.2.2 AI Enablement (WP-02.02)

The Contractor is responsible for implementing and delivering the following AI-enabled features:

a. **AI Search** - Use of AI technologies to enhance the process of finding and retrieving information.

b. **AI Content Assistant** - An AI-powered tool to support content creators in maintaining, editing, and generating new content. Features include:

   i. Assisted content editing;

   ii. Content drafting;

   iii. Style and quality checks;

   iv. Automated metadata tagging;

   v. Content gap identification.

c. **AI for content consolidation:** Use of AI for content migration, identifying duplication and standardizing content.

Note that, depending on the outcome of WP 01 Business Readiness and Design the following features may be integrated or any other AI capabilities may be included as recommended by the Contractor:

a. **AI for Reporting & User Engagement** - Use AI to analyze system usage and user feedback to optimize the content experience and operational efficiency.

b. **AI for Security & Governance** - Ensure compliance and responsible data handling through intelligent AI monitoring and policy enforcement.

Additionally, the Contractor may identify further capabilities for implementation. The Contractor must incorporate, integrate, and customize AI capabilities to assist user in interacting with the new KM solution and improving information retrieval. The Contractor must:

a. Leverage the existing AI POC Work and “Assist Me” the existing production AI search tool used by ESDC.

b. Work with ESDC to fine-tune integrated AI capabilities and align to the requirements.

c. Develop and deliver technical specifications, system and design documentation, configuration guides, and user manuals for all integrated and customized AI capabilities to enable our internal teams to maintain and support the AI integrations.

6.2.2.1 AI Technical Tools

The Contractor must use the identified AI tools. If additional tools are required the Contractor must work with ESDC to attempt to get equivalent AI tools in place, if possible, that align with the IT Branch’s directives. For the current list of AI tools please refer to Appendix L- ESDC Approved Tools.

6.2.3 Quality Reviews

ESDC will, at its discretion, conduct quality review processes to monitor standards, quality, use of toolsets, and best practices. Quality reviews will take place throughout the design and development and test stages and will assure:

a. Confirmation that guidance and best practices are followed; and

b. Review of the testing performed to verify accuracy and coverage of testing.

Reviews will take place during each sprint, as well as at key development points throughout development and testing, for the Contractor and ESDC to identify any issues or concerns during design and avoid rework after development has started.

The Contractor must:

a. Participate in the review process and explain the rationale behind implementation approaches and decisions and have an open discussion to determine what, if any, adjustments are required; and how they will be incorporated.

6.2.4 Testing

The Contractor is responsible for testing the KM solution as well as the AI enablement components, as outlined in section 7 Testing Methodology.

6.2.5 Deployment

The Contractor is responsible for deployment and configuration for the KM solution as well as the AI enablement components, as outlined in section 8 Deployment Methodology.

6.3 WP 03 Data Migration and Consolidation

6.3.1 Content Inventory and Analysis Report (WP-03.01)

The Contractor must develop and deliver a comprehensive report and summary outlining the inventory of content to support standardization and integration efforts. This report must include a detailed content inventory of more than 44,000 files across the ORT, CRT, KMT, IMPACT, IOM, and IRT systems, with a focus on identifying gaps, overlaps and duplicate content types across various tools and channels and programs. Additionally, the report must provide an in-depth analysis of the existing content to inform the recommended consolidation strategy and ensure alignment with organizational knowledge management objectives.

6.3.2 Strategy and Approach (WP-03.02)

The Contractor must deliver a content update strategy and approach to identify content requiring updates to align with newly implemented systems, templates, information architecture, processes, and roles. This deliverable must include a detailed methodology for assessing existing content, determining update requirements, and prioritizing content for revision. In addition, the strategy must incorporate an analysis of content duplication and gaps to ensure the updated content is accurate, relevant, and comprehensive. The approach must also outline the process for creating and delivering updated content, ensuring consistency with organizational standards and alignment with future-state operations.

6.3.3 Content Consolidation and Migration (WP-03.03)

The Contractor must consolidate all existing and new content into a centralized staging environment in preparation for migration to the new system. This includes aligning all content with the updated information architecture, style guide, templates, processes, and role-based access models. The Contractor must collaborate with ESDC to finalize the content. The Contractor must review the analysis of the content duplication and gaps and incorporate all aspects of this analysis in the content consolidation.

Most of the content (70-80%) must be finalized by the Contractor using a combination of AI tools and their own subject matter expertise, with the remaining 20–30% to be finalized by ESDC to ensure accuracy, alignment, and ownership. The Contractor must identify and document specific User Stories to guide the standardization, development, and testing of KM articles, ensuring consistency and the elimination of duplication. A comprehensive data cleansing process must be undertaken by the Contractor to remove outdated or obsolete content, correct formatting issues, and resolve broken links. Where feasible, the Contractor must leverage AI tools to automate the aggregation, analysis, and synthesis of content from multiple knowledge bases, providing a unified and comprehensive knowledge repository. Final deliverables must include a fully cleansed, standardized, and migration-ready content set. The Contractor

is responsible for the complete and accurate migration of all consolidated content in accordance with the migration and consolidation timeline agreed on by the Contractor and ESDC based on the roadmap (Appendix N – Proposed Migration Roadmap). The completion of this WP is expected to occur no later than Q3 of FY2028-29 with a view of earlier completion if feasible; subject to mutual agreement between ESDC and the Contractor and any adjustments as outlined in the project schedule or CM process.

The migration must occur in stages with at least two months of operation between each:

a. Initial KM Consolidation and Migration
b. OAS and CPP Content Migration
c. EI Content Migration
d. Remaining Content Migration

Prior to publication in the centralized KM solution, the Contractor must ensure that all content has been standardized using a comprehensive set of templates and a style guide developed specifically for this initiative. All content must adhere strictly to the formatting and editorial standards defined in the style guide to ensure consistency across the knowledge base. The Contractor must also deliver a detailed report on all migrated content and provide a separate report identifying content that was updated during the cleansing phase in the source system. The Contractor must collaborate with ESDC to validate that all updated content is accurately reflected in the new solution and meets business requirements.

6.3.4 AI usage

The Contractor must, when appropriate, leverage AI to support content migration from legacy systems to the new KM solution with smart consolidation and re-authoring tools. The Contractor must:

a. Support and streamline the KM content standardization, consolidation, and migration activities (WP-01 and WP-03);

b. Identify content overlaps, outdated content, and duplication across all the KM tools and channels in an effort to support the standardization and consolidation of knowledge into a single source of truth for a centralized KM solution;

c. Ensure content conforms to the chosen information architecture;

d. Identify content types/classification, topics, and metadata schemas across all the KM tools and channels and consolidate in support of a centralized information architecture;

e. Share and validate strategies/approach with ESDC to support, develop and test the standardizing, and updating of all KM articles to ensure consistency and elimination of duplication across existing content

6.3.5 Testing

The Contractor is responsible for testing as outlined in section 7.0 Testing Methodology.

6.3.6 Deployment

The Contractor is responsible for deployment as outlined in section 8.0 Deployment Methodology.

6.4 WP 04 Change Management (CM)

The Contractor must deliver KM CM services including the strategizing, planning, coordination, execution, evaluation, monitoring, and reporting of activities to manage the people side of change. CM activities enable culture and organizational change through effective and quality stakeholder identification and

analysis, change impact assessment, Sponsor and leadership activation, stakeholder engagement and communication, training, and change readiness assessment.

Contractor activities must align to the BDM CM strategy, standards, tools, and processes supporting the alignment and integration of CM across BDM projects to better manage the ESDC employee and stakeholder experience. The BDM strategy is aligned to leading industry methodologies including Prosci© and Managing Successful Programmes©. Refer to Appendix P – Stakeholder Engagement Communication Standards, Appendix Q – BDM Change Management Strategy, and Appendix R – Change Management Process.

The Contractor must:

a. Develop CM strategies, an integrated CM plan and roadmaps to guide the implementation of organizational changes;

b. Develop and maintain updated stakeholder identification, stakeholder analysis, and change impact assessment documents to inform tailored CM plans;

c. Deliver and regularly update the Change Impact Assessment (CIA);

d. Develop the training needs assessment to inform a role-based training plan;

e. Develop, integrate, design materials, execute, update, monitor, and report on CM plans:

    i. Facilitate stakeholder engagement and buy-in through the planning, coordination and delivery of engagement sessions, workshops, town halls, and/or one-on-one meetings in both official languages to address concerns and solicit input and feedback;

f. Identify and engage change champions and influencers using change networks to support change initiatives and drive adoption within the organization;

g. Provide train-the-trainer and training and development programs;

h. Collaborate with project teams and cross-functional stakeholders to integrate CM activities into project and programme plans and timelines; and

i. Provide ongoing support and coaching to leaders and managers to reinforce change messages and sustain change momentum.

6.4.1 Change Impact Assessment (CIA) (WP-04.01)

The CIA is used to inform stakeholder analysis and CM plans.

The Contractor must use the overall degree of change and concerns or issues as the primary drivers in defining, planning, and conducting relevant CM activities for all stakeholder groups. The Contractor must categorize and assess the change impacts based on processes, organization, technology, information and data, ways of working and behavior, and knowledge and skills.

The Contractor must:

a. Build on ESDC's initial assessment of stakeholders as a baseline, assess the current and future state and key change impacts, including impacts related to how the work itself is changing for key roles, inclusive of technology impacts and any other tasks, skills, or behaviours (new ways of working) required to articulate new roles of the future;

b. Map the change impacts, including potential changes to work itself, across all stakeholder groups based on the operating model and identifying changes to skills/capabilities required and any net-new roles;

c. Consolidate and summarize impacts captured by stakeholder groups to update and refresh the baseline stakeholder assessment and inform change planning;

d. Utilize the Stakeholder Analysis and Change Impact Assessment (SA&CIA) tool, which is accessible via the BDM CM SharePoint site, to support the development of this deliverable; and

e. Ensure validation sessions are conducted and completed with all stakeholder groups impacted by the release.

The Contractor must refresh the CIA following each deployment. The updated CIA must be submitted upon completion of the Testing stage gate.

The CIA must be refreshed by the Contractor once development is complete in advance of each release. This CIA must include new impacts, revisiting / reassessing existing impacts and informing evolving CM activities.

6.4.2 Stakeholder Identification and Analysis (WP-04.02)

The Contractor must develop and maintain stakeholder identification, analysis, and mapping of stakeholders to the respective interest/influence quadrants and use this information to develop the change plans.

The Contractor must conduct a stakeholder analysis to inform CM planning to ensure stakeholders' behaviors and needs are defined, understood, and considered when planning and implementing targeted change activities.

What is expected:

a. Start with the stakeholder list provided by ESDC, review the list and complete the analysis of stakeholders. Add additional stakeholders as they become known for each release;

b. Stakeholders must contain those that are impacted, will/could impact, or perceive themselves as impacted by the design and implementation project;

c. Produce the Interest/Influence Matrix;

d. Extract relevant information for CM planning including current and required stance; and

e. Validation sessions have been completed including Business SMEs involved in the project.

6.4.3 Change Management Strategy and Plans (WP-04.03)

The CM strategy and plans define the tactics used to support impacted stakeholders to transition from current state to future state; therefore, the CM Plans are dependent on future state design being available and understood, as it is a key input for the plan to be fulsome.

The project timelines are a key input to CM planning.

The Contractor must:

a. Build a KM CM strategy and corresponding integrated CM plans that address changes resulting from the migration from the existing KM solutions to the one centralized KM solution and outline

specific methodologies, tools, actions, timelines, and baseline measures needed to deliver the change;

b. Develop, integrate, design, coordinate, execute, monitor, and report on CM strategies and plans, including the communication plans;

c. Ensure plans are informed by the CIA and stakeholder analysis and reflect the different needs of stakeholder groups;

d. Ensure CM plans must align and integrate with Programme level and other BDM project plans where there are project integration requirements;

e. Ensure engagement with NHQ and regions must have material/content that is fully accessible and available in both official languages;

f. Ensure ESDC translation timelines are integrated into CM tactical plans. Timelines will be provided by ESDC.

g. Present a summary of the scope of each release and implications for the CM Plan;

h. Revise and refine the Change Plans for each planned deployment leveraging information from the previous CM Plans and identifying new activities to support people readiness;

i. Use ADO as the main tool to track CM risks, issues, actions, and decisions; enter Change Plan activities in ADO as the live monitoring tool;

j. Provide updates on the execution of the CM Plan provided across forums – including weekly status updates, Steering Committee Meetings, Showcase Meetings, etc.;

k. Evaluate and communicate the impact of decisions affecting the approved sequence of CM activities and propose mitigations to enable people readiness;

l. Use outputs of the CIA to inform the communication, and engagement plans as well as the TNA;

m. Ensure lessons learned (LL) are documented post each release and are used to inform future planning. LL's are also shared with the broader BDM team;

n. Review and use plans from OAS on BDM and EI where appropriate to maintain a common look and feel and experience for BDM stakeholders i.e. leadership activation, change network implementation;

o. Leverage best practices from other BDM projects where possible to reduce duplication of effort.

p. Meet established quality standards, provide an appropriate level of detail, and utilize approved templates for consistency and clarity.

q. Use CMO's Stakeholder Analysis and Change Impact Assessment Tool to define changes, first on the Processes, Organization, Technology and Information (POTI) analysis model and then on Stakeholders; and

r. Ensure plans are aligned to the BDM CM strategy, standards, process, and tools.

6.4.4 Training Needs Assessment (TNA) (WP-04.04)

The TNA is used to identify gaps between employees' current skills and competencies and the skills required to achieve organizational objectives with the new KM solution.

The Contractor must:

a. Capture the changing workforce requirements for Users;

b. Perform a learning needs analysis identifying all key skill, knowledge, and capability gaps including the skills required to use KM;

c. Develop a strategy to prioritize and mitigate skill gaps to inform learning journeys for Users; and

d. Identify key learning considerations for different audience groups to decide appropriate training delivery methods for the impacted audiences in the training plan.

6.4.5 Training Plan (WP-04.05)

The training plan is a comprehensive document that outlines the objectives, strategies, and activities required to develop knowledge, skills, and competencies in individuals or teams.

The Contractor must develop and deliver a training plan that:

a. Leverages the stakeholder analysis and the TNA to create a plan that meets the training needs of KM;

b. Includes goals and objectives, activities with a defined RASCI and schedule for execution;

c. Leverages the TNA, it should identify a role-based training curriculum that includes assigned SMEs, course duration, course objectives based on continuous learning; and

d. Is integrated with the other KM CM plans.

6.4.6 Training Materials (End User) (WP-04.06)

The Contractor must:

a. Develop learning materials for all new processes and enhancements;

b. Use a training material tracker to manage training material development and facilitate key reviews/validation;

c. Ensure training material produced is fully accessible and available in both official languages (translation completed and coordinated by ESDC). Appropriate timelines must be planned to allow for translation of French training materials (standards provided by CPD CM team);

d. Design training material and activities (e.g., scenarios, exercises, guides, videos);

e. Implement required updates results from functional and user acceptance testing; and

f. Prepare learning support objects for deployment.

6.4.7 Train the Trainer (TTT) Materials (WP-04.07)

The Contractor must:

a. Work with the Infrastructure team to ensure an update and load of the training environment with KM mock data and exercises;

b. Design train-the-trainer and learner support approaches aligned to the existing operational training strategy;

c. Ensure session materials are fully accessible and available in both official languages;

d. Offer TTT sessions in both official languages;

e. Prepare learning support objects for deployment;

f. Assist with coaching TTT participants and responding to questions that may arise from these participants as they complete the self-paced and/or digital learning aspects;

g. On recommendation from ESDC Business Readiness, revise, and update TTT material following session feedback through CPD CM Team; and

h. Co-ordinate the timelines for development of French artifacts.

6.4.8 Change Readiness Report (WP-04.08)

The change readiness report provides an assessment of the organization's ability to adopt the new technology and adapt to new practices.

For each release, the Contractor must:

a. Develop a readiness report in advance of each release to provide data driven insights to people readiness to inform the go no go decision for each of the releases;

b. Define readiness, establish readiness KPI's, develop the tactical readiness plan, and track metrics to report on CM delivery and readiness. Content must include:

   i. Change readiness surveys;

   ii. Training evaluation surveys;

   iii. Pre and post deployment adoption and productivity rates;

c. Create and administer surveys in Qualtrics;

d. Capture qualitative information (e.g., focus groups, interviews, engagement activity feedback and comments, governance, and leadership input) to supplement data collection;

e. Analyze results (e.g., heatmap, dashboard reporting for impact assessments and leadership alignment);

f. Integrate CM activities into the readiness plan;

g. Track and report issues once baseline survey information is known; and

h. Post transition CM support:

   i. Establish and track change adoption KPIs such as user engagement, satisfaction scores, and system utilization rates; and

   ii. Monitor post transition adoption and productivity levels and work with the operational teams to develop CM plans as required to address any residual change resistance and reinforcement adoption.

6.4.9 Lead the community of practice

As part of the KM Stakeholder engagement and communication plan the Contractor must guide and actively engage the key stakeholder community throughout the configuration, build, and testing phases

and ensure that all stakeholders' perspectives are considered, fostering collaboration to deliver the highest-quality product.

The Contractor must:

a. Develop and implement a structured engagement plan for stakeholder involvement, ensuring transparency and regular communication;

b. Conduct regular and timely stakeholder meetings to gather feedback, address concerns, and document lessons learned; and

c. Ensure that stakeholder concerns are documented and addressed in a timely manner via a feedback loop to minimize resistance and optimize adoption.

6.4.10 Collaboration

In addition, the Contractor must work closely with the CM team and internal stakeholders from the various CM and KM groups within ESDC to:

a. Provide a detailed change communication plan, including regular updates, training sessions, and stakeholder engagement activities.

b. Implement and track Key Performance Indicators (KPIs) to measure the success of CM efforts (e.g., stakeholder engagement rates, training completion rates, adoption metrics);

c. Provide a post-implementation support plan, ensuring a smooth transition and offering coaching sessions for stakeholders as needed; and

d. Monitor post transition adoption and productivity levels and work with the operational teams to develop plans to address any residual change resistance and reinforce adoption.

6.4.11 Reporting & Performance Metrics

a. The Contractor must submit bi-weekly status reports summarizing progress, key challenges, and next steps. The Contractor may be asked to present these findings to the team and senior management;

b. The Contractor must establish and track change adoption KPIs; and.

c. Final project reports must include a retrospective analysis, identifying what worked well, challenges encountered, and recommendations for future change initiatives.

6.5 WP 05 Release Management and Transition Out

This WP is focused on the management of the KM solution's release management framework and processes, ensuring proper governance and stabilization prior to transitioning to operations. This encompasses software updates, process refinements, and defect resolution in alignment with the broader KM Release Management Framework.

In order to ensure proper governance and stabilization, and a successful transition to ESDC, the Contractor must:

a. Collaborate with ESDC to ensure that all required processes are clearly defined and adhered to;
b. Facilitate effective post-deployment stabilization and support for various releases;
c. Provide post-deployment stabilization support for a minimum of 90 days, which includes incident response, defect resolution, and user training as necessary;

d. Develop a Post-Deployment Support Plan to outline Service Level Agreements (SLAs), escalation paths, and issue resolution workflows; and
e. Assist in providing any supporting documentation required for various governance committees to ensure compliance and transparency in the operation of the KM solution.

6.5.1 Release Management

The release management process provides a structured approach to ensure that every release is thorough, well-prepared, and meets quality standards. It is essential for minimizing risks, improving stakeholder confidence, and achieving successful product launches.

In addition to standard release processes, the Contractor must ensure that development activities align with architectural, design, and business requirements. This includes delivering key strategies and plans that support environment management, code promotion, operational security, and comprehensive governance throughout the development lifecycle.

6.5.1.1 Release Plan and Scheduling (WP-05.01)

The Contractor, coordinating with business and operations teams for readiness, must develop and maintain a comprehensive release plan for each release cycle, including scheduling, scope, resource plan, a risk assessment, dependency mapping, and resource allocation to mitigate potential delays or conflicts and key milestones. The Contractor must review and update the plan as necessary throughout the project lifecycle to align with the KM initiative Planning Intervals (PI) and any evolving priorities

6.5.1.2 Release Inventory and checklist validation (WP-05.02)

The Contractor must conduct release inventory and checklist validation to ensure that all aspects of the KM solution are accounted for, in compliance with quality standards, and ready for deployment and involves a comprehensive inventory of features, bug fixes, and other deliverables included in a release, alongside a validation checklist that helps ensure all necessary steps have been completed for a successful launch.

Release Inventory

The Contractor must prepare the release inventory that provides a detailed list of all items that are included in the upcoming product release. It provides transparency to all stakeholders and serves as a reference point for what is expected in the release.

Some of the components of inventory and checklist must, at minimum, include the following:

a. List of Epics, features and user stories that are implemented;
b. List of outstanding defects (if any);
c. List of bug fixes with the respective ADO ticket numbers;
d. Identify items that can be categorized as technical debt;
e. Dependencies to external systems, APIs or components;
f. Potential changes or updates to other systems that could have an impact on the KM solution;
g. Configuration and/or development checklist for each release.

Checklist Validation

The Contractor must perform the checklist validation process to ensure that each aspect of the release is validated against a predefined list of criteria before deployment. This helps catch any potential issues and ensures compliance with organizational standards. Below is a list of criteria that must be included in the checklist and will confirm its completion:

a. Development completed with acceptance criteria met

b. Testing completed
c. Documentation completed
d. Deployment readiness scripts and rollback procedures completed
e. Stakeholder sign offs
f. Pre-release communication
g. Confirmation on release execution
h. Post release review

6.5.1.3 Technical Systems Documentation (WP-05.03)

The Contractor must provide the necessary technical documentation required for the KM solution to ensure a smooth release process. The technical documentation helps stakeholders understand the software's functionality, usage, and underlying architecture, and provides essential information for developers, testers, and end-users.

The Contractor must prepare and provide documentation for each release and must be delivered to the relevant stakeholders and project oversight.

The Contractor must maintain a release audit log detailing version history, deployment status, rollback events, and approvals. All documentation must adhere to a specified format to ensure consistency and compliance. The documentation must include impact assessment for business and users.

Below is a list of common technical documentation that must be used for all releases:

Release Notes

A summary of the release, including features, enhancements, bug fixes, and any known issues. Here are some aspects to be included in the release notes:

a. Version number
b. Release Date
c. Overview of the scope and changes
d. List of epics/features added, improved, or removed.
e. Resolved bugs and issues
f. Known issues and limitations
g. Upgrade instructions

User manuals or online help documentation updates.

The Contractor must produce all the release documentation that will support the releases and must include the following:

a. User manuals and guides
b. Troubleshooting guides

6.5.1.4 Release Management for Release 1 (MVP) and other subsequent releases (WP-05.04)

The Contractor must adopt and apply Agile methodology, by identified MVPs for the KM items through a selection of baseline User Stories to understand the functionality and how the functionality can be used by the organization, then identifying a target state for the capability and managing a Backlog of User Stories to incrementally deliver value and achieve the full scope of the capability over time.

The MVP (release 0) must include all the common functionality across the various releases and any foundational components, as illustrated in Appendix N – Proposed Migration Roadmap.

6.5.1.5 Implementation Decision Document/Report (IDD/IDR) (WP-05.05)

The Contractor must develop an Implementation Decision Document (IDD) or Implementation Decision Report (IDR), which is a formalized document that outlines the decisions made regarding the implementation of the KM solution. This document serves multiple purposes: it records key decisions, provides justification for those decisions, and guides the team during the implementation phase and must include the following:

a. Scope of Implementation.
b. Implementations options and justification/assessment criteria, summary of pros and cons and decision rationale.
c. Sign off from key stakeholders.

6.5.1.6 Post-Release Monitoring and Support (WP-05.06)

Following each release, the Contractor must monitor the deployment for any issues or performance concerns, address critical incidents, and implement hotfixes or rollbacks as necessary within pre-defined and agreed upon response times for issue resolution. Additionally, the Contractor must ensure effective post-release support, including resolving any post-deployment issues and ensuring user acceptance testing (UAT) is completed successfully.

6.5.1.7 Post-Release Lessons Learned (WP-05.07)

The Contractor must document all post release lessons learned and maintain a post-release checklist and tracking through tools like ADO.

6.5.1.8 Rollback Procedures (WP-05.08)

The Contractor must establish and document a clear set of rollback procedures for each release to mitigate the risk of failed deployments. These procedures must ensure that in the event of a deployment failure, the system can be reverted to a previous stable state with minimal disruption to end-users. Rollback procedures must include a rollback verification test to confirm system stability post-rollback.

The Contractor must document rollback conditions, specifying when rollback is mandatory versus when mitigation strategies should be attempted first including the impact on service desks and client communication if rollback affects production environment.

6.5.2 Knowledge Transfer Plan and Transition Out

The Contractor must develop and plan for transition and knowledge transfer, resulting in a Transition Out and Knowledge Transfer Plan. The Contractor must contribute to the development and execution of the plan.

6.5.2.1 Knowledge Transfer (KT) Plan

The Contractor must develop the KT and transition strategy, approach, and plan to be executed to enable ESDC to effectively operation and maintain the KM solution following the Stabilization period.

Knowledge transfer must be conducted but not limited to the following ESDC teams. ESDC will confirm the list of participates during the Transition period.

a. Service officers (EI/CPP/OAS)
b. Business owners/clients
c. IT owners

KT Strategy, Approach and Plan (WP-05.09)

The Contractor must define and elaborate the KT strategy, approach, and plan to ensure a structured approach to transferring knowledge from the Contractor to ESDC. This process is critical for ensuring that essential knowledge, information, and skills are shared effectively to successfully handover the project implementation and ensure business continuity.

The Contractor must outline the KT strategy and the overall objectives and goals. In addition, they need to identify the key knowledge areas that need to be transferred and establishes the rationale behind the need for knowledge transfer. Some aspects include the following:

a. Identify the knowledge areas (technical, functional, procedural etc.).
b. Identify key stakeholders and decision makers
c. Identify metrics to measure successfully KT.

The Contractor must outline the approach with detailed information on the methods and techniques used to facilitate the transfer of knowledge between identified stakeholders. Some aspects could include the following:

a. Mentorship and coaching
b. Training sessions
c. Knowledge sharing platforms and collaborative tools
d. Job Shadowing
e. Comprehensive documentation

The Contractor must define and elaborate the KT plan with detailed step by step information for implementing the KT strategy and approach including tasks, timelines, resources and responsibilities. The plan must include the following:

a. Preparation phase
b. Implementation phase
c. Monitoring phase
d. Continuous Improvement phase

6.5.2.2 KT completed report (WP-05.10)

a. KT and Transition Complete Report to confirm that all the KT and transitions in the plan have been completed.

6.5.2.3 ConOps (WP-05.11)

The Contractor must complete the ConOps documentation which includes the processes, procedures, and governance required to operate the KM solution from a technical perspective in production, following a release.

6.5.2.4 Transition Out

The Transition Out must include the transition of all processes and documentation developed during the execution of the Work of this TA. The Contractor must complete the Transition Out services and activities identified in the Transition Out Plan and Report (WP05.12), which must include the following:

a. Transition Preparation Plan: Develop a plan to execute activities required to prepare for the transition, regardless of the end state operating model;

b. Transition Preparation Report: Confirm that all transition preparation activities in the plan have been completed;

Transition Out plan

The Contractor must define the transition out plan at the end of the TA to ensure that all transitions from the Contractor are successfully completed and handed over to the designated team to ensure business, operational continuity and minimize disruptions.

Transition Out Report

The Contractor must produce a transition out report indicating the successfully completion of the transition out strategy, approach, and plan. The Contractor must ensure that all aspects of the transition are clearly communicated, documented, and handed over to relevant stakeholders to facilitate a smooth transition.

6.5.2.5 Post Cutover Checklist (WP-05.13)

The Contractor must complete a post cutover checklist to ensure that all necessary tasks are completed and that the transition was successful. A post cutover checklist must be a comprehensive guide to ensure successful transition out and helps to mitigate risks and enabling a smoother transition to ESDC.

6.5.2.6 Post deployment stabilization per release (WP-05.14)

The Contractor is responsible for any post deployment stabilization per release. This must include a 90-day post deployment stabilization period, following the final release, which must not exceed the end date of the Task Authorization.

This phase focuses on ensuring that the newly deployed solution is functioning as intended and stabilizes any operational disruptions. During this period, Canada and the contractor monitor the system closely, address any issues, and guarantee that users have an optimal experience. The Contractor must identify and define the processes for the following:

a. Monitoring system performance
b. User support and feedback
c. Issue resolution
d. Validation and testing
e. Performance and optimization
f. Change Management
g. Any additional documentation

6.6 WP-06 Project Management and Governance

The Contractor must provide project management support in collaboration with ESDC's Project Management Office (PMO), ensuring alignment with internal governance structures while maintaining oversight of project execution. This will ensure alignment with BDM programme management office and Treasury Board Project Management policies, standards, and guidelines.

6.6.1 Project Management Artifacts and Approach (WP-06.01)

The Contractor must provide project management services to support user adoption of the new KM solution across the department. This includes a project plan, risk management strategy, onboarding strategy, and training.

a. The Contractor must be working alongside the Project Teams to ensure that all the registries (RAIDD - risk, actions, issues, decisions, dependencies, and lessons learned) are updated regularly within the appropriate tool (Azure Dev Ops).

b. The Contractor must provide updates, briefs and presentations to users, senior management, and stakeholders (see proposed Delivery Approach in Appendix H - Proposed Delivery Approach and Governance Model).
c. The Work must be divided into a Delivery Plan consisting of Planning Intervals (PIs). PIs are schedule intervals to plan the Backlog and activities for each team. Each PI consists of a combination of activities such as Define, Design, Build (Proofs of Concept), Test, Deploy, and continuous planning. Within each Planning Interval, teams must Work in sprints consisting of a repeatable phase dedicated towards executing a set of planned, prioritized activities that contribute to the desired outcomes.
d. The Contractor is responsible for Project Management applications to deliver the KM initiative including supporting the ESDC's PMO.
e. The Contractor must provide Project Management and Deliverable Management oversight with all supporting documents and reports to the Project Authority (or designated representative) and Governance (Appendix H - Proposed Delivery Approach and Governance Model). This could include, but not limited to, the format and timing of Project Meetings, the timing of Status Reporting and all other Project Management activities required by the Project Authority (or designated representative) and Governance Committees.
f. The Contractor must work with ESDC to identify a deliverable matrix review (WP-06.03) along with the RACI to ensure quality reviews and approvals for all deliverables are conducted in an organized manner.

6.6.1.1 KM Initiative Meetings and Supporting Documentation

6.6.1.2 KM Initiative Kick-Off

Within five (5) business days of the award of the TA, the Contractor must notify the Project Authority (or designated representative) of the proposed date of the kick-off meeting. The date must be no later than thirty (30) business days from the TA award date. Included in the meeting notification must be:

a. A list of documents or materials that require translation, including approximate length;

b. A detailed list of the names and/or skill requirements for the Subject Matter Experts (SMEs) that ESDC should make available for the kick-off;

c. KM Initiative Kick-off Deck;

d. Deliverables outline for KM Initiative Management Plan (PMP);

e. High-level schedule with proposed Planning intervals; and

f. Document and share Contractor alignment approach.

ESDC is responsible for organizing, scheduling, recording, and hosting the kick-off meeting, as well as translating materials. The estimated timeline for ESDC to turn around any translation is as follows:

a. One to five pages – two (2) days

b. Six to eight pages – four (4) days

c. Nine to twelve pages – six (6) days

d. Add one (1) day for each additional page

6.6.1.3 Additional Meetings and Supporting Documentation

Further meetings, beyond the Kick-off, will be agreed to between the Contactor and the Project Authority (or designated representative).

The Contractor is responsible for organizing and conducting the meetings with the Client and other designated stakeholders throughout the duration of the project. For any meetings that must be bilingual, the Contractor must collaborate with the ESDC teams to provide translation support, both written and oral. This includes, but is not limited to, Daily Stand-Ups, Weekly Project Meetings, Bi-weekly Executive Meetings, Sprint Planning, Retrospective Sessions, Planning Interval Showcases input to BDM governance meetings including KM steering committee, Business engagement, Transformation Project Board, Sponsoring Group, Minister's Office, Minister, and other governance committees. The Contractor must:

a. Schedule and facilitate meetings in coordination with ESDC.

b. Prepare and distribute meeting agendas in advance.

c. Document and share meeting minutes, including action items and decisions made.

d. Develop and deliver professional presentations to communicate project progress, deliverables, risks, and recommendations.

e. Ensure all presentations are tailored to the audience and delivered using appropriate formats and tools.

All meetings and presentations must be conducted in a timely and professional manner, supporting the overall objectives and timelines outlined in this SOW.

The Contractor's resources must make themselves available to participate in meetings as required by the Project Authority (or designated representative), Governance Committees, and internal/external Quality Assurance Team.

6.6.2 Project Management Plan (WP-06.02)

The PMP documents the structure, processes, and resources that will be used to execute a successful project and create deliverables that meet ESDC's requirements. The PMP covers the project organization, approach and timeline, work planning, and controls.

The PMP is maintained throughout the life of the project. It must be considered the primary source for information about the project's organization, stakeholder engagement, and project management processes, tools, and terminology.

The Contractor must develop a detailed KM Initiative Project Management Plan that must include the following:

a. The Contractor must develop a project definition which identifies tasks, deliverables, activities, work breakdown, feature breakdown structure, sprint plan, Backlog, User Stories, User Stories sequencing, sprint schedule, release plan including release schedule, deliverables, and dependencies as required to deliver the Work reflected in Statement of Work.

b. Dependencies and dependency management, including but not exclusive to third party dependencies:

i. Dependencies should be identified at the task and deliverable/output level between the different trains.

c. Key milestones

d. Risk, Actions, Issues, Dependencies and Decision (RAIDD) management

e. Change control

f. Deliverable and approval management

h. Performance and quality management

i. Vendor management approach (between the Contractor and ESDC)

j. Support or activities required from ESDC

k. The Contractor's process and time required to onboard new resources, including any support required from ESDC;

l. The tool to be used for training (i.e., SABA or a new training tool).

m. Knowledge transfer for service officers (EI/CPP/OAS) provision.

o. The Contactor must develop a project definition which specifies technical environment and tools required.

6.6.3 KM Initiative Schedule (WP-06.04)

The Contractor must develop a detailed KM Initiative Project Schedule plan that demonstrates the project timelines and submission dates, and then coordinate, monitor, track and adjust as required. This plan must adhere to the BDM Programme Schedule Standards. This Plan must include contingency and ways of optimizing KM delivery. include contingency and ways of optimizing KM delivery.

The KM Initiative Schedule must contain, at a minimum:

a. The Start and End Date for PI 0 and Product 1 at a minimum, including planned Showcase and PI Report dates

b. The Time required for translation of deliverables and other materials such as screen translation, KM Taxonomy, and engagement materials;

c. The Time required for approvals from ESDC; and

d. The Low productivity times such as statutory holidays, school holidays, black and brown out periods and traditional vacation periods such as the summer.

Resource Plan

The Contractor must provide a Resource Plan that includes, at a minimum, the following;

a. RASCI detailing roles and responsibilities between the Contractor and ESDC

b. The Delivery Team that ESDC's resource would support

c. The start and end date required for ESDC's resource

d. The specific knowledge that ESDC's resource requires

e. Any skills ESDC's resource requires, including level of security clearance; and

f. Any mitigations if ESDC's resource is not available.

The Contractor must provide contingency plans for potential KM Initiative delays due to approval bottlenecks or staff availability. If a critical ESDC resource is unavailable, the Contractor must propose alternative resource support to mitigate KM Initiative risk and update plans and support documents accordingly.

6.6.4 Executive Showcases (WP-06.05) and Sprint Showcases (WP06.06)

The Contractor must work with ESDC to organize the Sprint showcases and Executive showcases and ensure all the appropriate stakeholders are included in these meetings.

The Contractor must provide the support documents and presentations decks and dashboards at least two (2) business days prior to the showcases.

6.6.5 Executive Summary Reports (WP-06.07), Sprint Reports (WP-06.08), and Weekly Status Report Summaries (WP-06.09)

The Contractor must provide status reports and updates to ESDC at a regularly scheduled time as agreed upon with ESDC. The reports include:

a) Weekly status reports
b) End of sprint report
c) End of PI report
d) Status decks and updates to senior management
e) Identifications of risks/issues which require escalation
f) Any ad hoc report or status updates as requested by senior management

6.6.6 Ongoing Project Management Activities (WP-06.10)

Once Business Readiness and Design is completed, subsequent activities executed in other work packages may reveal additional tasks and gaps that need to be addressed. To ensure quality excellence in the products, and to address new insights and feedback that arise, the Contractor must take appropriate action and provide necessary updates accordingly.

6.6.6.1 User Story Management

Upon completion of WP 01 Business Readiness and Design, the Contractor must:

a. Create and identify any additional User Stories not defined in WP-01 of functionality that emerge during the execution allowing us to address new insights and feedback that arise;

b. In collaboration with ESDC, make updates to existing User Stories defined in WP-01 or create new User Stories based on information gathered throughout development, testing and usage of the solution;

c. Review User Stories defined in WP 01, regularly, updating them based on new information as needed; and

d. Following the review if there are additional new User Stories to be created, the Contractor must work with ESDC to ensure that these User Stories are within the scope. Upon agreement, the newly created User Stories will be included in the Backlog.

6.6.6.2 Ongoing Document Management and Update

Upon completion of WP 01 Business Readiness and Design, the Contractor must:

a. In collaboration with ESDC, make updates to the existing documents, architectures, strategies and frameworks when applicable to ensure they remain current; and

b. Review these same artifacts quarterly to ensure their completeness.

6.6.7 Governance Model and Delivery Approaches (WP-06.11)

The Contractor must review the governance model and proposed delivery approach illustrated in Appendix H – Proposed Delivery Approach and Governance Model. The Contractor must leverage their expertise and recommend best practices to assist ESDC in finalizing these approaches. The Contractor must justify any deviation thereafter.

The Contractor must document this approach and align to it in any Governance related activities. The Contractor must work with ESDC to ensure that the required governance processes have been defined and adhere to Appendix H – Proposed Delivery Approach and Governance Model to obtain the necessary approvals.

The Contractor must:

a. Adhere to the KM governance model (Appendix H – Proposed Delivery Approach and Governance Model);

b. Create and provide any supporting documentation for various governance committees;

    i. Manage and report through Governance including bi - weekly status reports, and reports for Transformation, Sponsor and Minister Governance Boards. (Appendix H - Proposed Delivery Approach and Governance Model).

c. Define a delivery approach, enabling functions and transformation;

d. Define and manage each Delivery Team, its structure, and its deliverables and the corresponding RACIs;

e. Define ways of working and refine the ADO structure as the Backlog prioritization;

f. Define all planned releases/phases and the corresponding details such as scope, timelines, dependencies etc.

g. Define and manage the Governance for all release management activities.

f. Provide resource management amongst the Contractor for each Delivery Team including the distribution of Work after obtaining approval from the Project Authority (or designated representative);

g. Manage the delivery of work performed by Contractor resources under this TA;

h. Manage the Work within the estimates agreed by all Contractors and provided to ESDC.

i. Track progress and financials and provide regular reports to the Project Authority (or designated representative).

j. Thoroughly document all issues that may lead to pricing adjustments, including a clear explanation of the circumstances and justification for the proposed adjustment.

6.7 Acceptance Criteria

Deliverables will be accepted or rejected by Canada within five (5) business days from the time of submission for acceptance, excluding statutory holidays, unless otherwise defined. Deliverables will be deemed provisionally accepted in the absence of review or response within this specified time, unless a delay in feedback is communicated due to complexity or other justified reasons. Final acceptance remains subject to a complete review but will not delay payment unless deficiencies are identified.

6.7.1 The Deliverable Acceptance Process includes:

1. Submission of Deliverables
    a. The Contractor will notify the Project Authority (or designated representative) in writing that a Deliverable is ready for review. All Deliverables must meet the following acceptance criteria:
        i. All required components included as defined in Appendix F – KM Deliverables, including any work associated to the Work Packages as described in this Annex;
        ii. 100% alignment to approved templates or formats;
        iii. Confirmation of internal quality review (Contractor's confirmation of internal review prior to submission); and
        iv. Minimum rating of 3 on a 5-point deliverable evaluation scale (section 6.7.2) for understandability and technical soundness.
2. Assessment of Deliverables
    a. The Project Authority (or designated representative) must determine whether the deliverable meets the requirements as defined in this SOW and Appendix F – KM Deliverables and that the deliverable is complete.
    b. Additional work on, or changes to, an accepted deliverable that are requested by the Project Authority (or designated representative) must be managed through the Change Management Process.
3. Acceptance / Rejection
    a. After reviewing the deliverable, the Project Authority (or designated representative) must evaluate it using the established 5-point deliverable evaluation scale. If the deliverable receives a score of **3 or higher**, the Project Authority (or designated representative) will accept it in the form of hard copy signature, email approval or digital confirmation in ADO. If the deliverable scores **below 3**, the Project Authority (or designated representative) must provide written justification for the score and advise the Contractor. In such cases, the deliverable must be revised and resubmitted at **no additional cost to ESDC**.
    b. If there has been no feedback from Project Authority (or designated representative) within five (5) business days of delivery, the Deliverable will be deemed provisionally accepted; unless a delay in feedback is communicated due to complexity or other justified reasons.
4. Correction of Deliverables
    a. The Contractor must correct in-scope problems found with the deliverable and address the correction of out-of-scope changes according to the Change Management Process.
    b. The Contractor must submit a schedule for making changes to the deliverable within two (2) business days of receiving notification of a rejected Deliverable.
    c. Once the Project Authority (or designated representative) deems all identified, in-scope issues resolved, the deliverable will be deemed accepted.
5. Monitoring and Reporting
    a. The Contractor must track deliverable acceptance.

b. Updates on deliverable acceptance must be included in the status report and discussed in the status meeting.

6. Dispute Escalation
    a. The Contractor may submit a written dispute within five (5) business days of receiving the deliverable score.
    b. If a disagreement persists after informal discussion between the Contractor and the Project Authority (or designated representative), the matter may be escalated to a Neutral Reviewer, who may be:
        i. A senior ESDC representative uninvolved in the original review; or
        ii. A mutually agreed third-party reviewer (e.g. external SME)
    c. The neutral reviewer will:
        i. Review the deliverable, original evaluation, and Contractor's response and issue a final binding decision for purposes of deliverable acceptance and payment.

6.7.2 Deliverable Evaluation Scale

Rating	Description
5 – Excellent	Clear, self-explanatory, technically rigorous
4 – Good	Mostly clear, well-supported by technical reasoning
3 – Adequate	Understandable and meets minimum technical requirements
2 – Poor	Difficult to interpret or lacking key technical logic
1 – Unacceptable	Confusing, incomplete, or technically flawed

6.7.2.1 Understandability

Deliverables must be:

a) Written in clear, plain language (avoid unexplained jargon);
b) Accompanied by diagrams or visuals as needed;
c) Logically structured and aligned with templates; and
d) Submitted with a summary explaining purpose and context.

6.7.2.2 Technical Soundness

Deliverables must:

a) Be logically consistent and complete;
b) Clearly state methods, assumptions, and references;
c) Align with industry standards or frameworks (where appliable); and
d) Be fit for the intended use, as defined in this SOW.

7 Testing Methodology

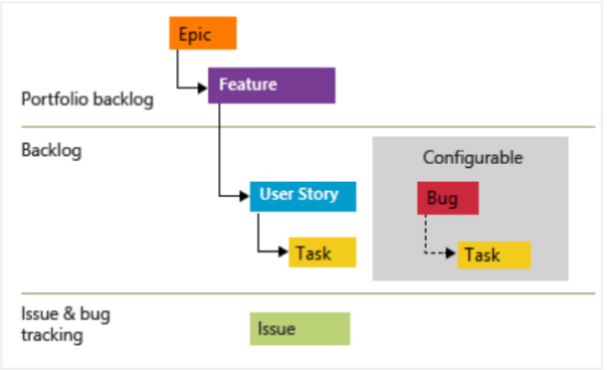
7.1 Testing Type

The Contractor must specify the type and frequency of testing activities. This must include identification of ongoing testing, milestone-based testing that serves as gating criteria, and end-of-development testing required prior to the release of any deliverable.

A combination of Agile and Waterfall methodologies is required to optimize testing as well as to ensure a fully functioning and cohesive solution for KM. The Contractor must collaborate with ESDC testing resources through planned working sessions and informally, as, and when required, to achieve quality, on-time and within budget completion of testing for every testing type and build cycle. The Contractor must propose the combination of agile and waterfall methodologies for both function and non-functional areas. This proposal is subject to review and approval by ESDC Project Authority (or designated representative).

For all testing types where ESDC is responsible for oversight that includes random spot checks, the Contractor must support the provision of working test environments and manage defects.

The User Stories and subsequent requirements and specifications must be developed by the Contractor team with support from ESDC, using the structured illustrated below through work items that must be managed in Azure DevOps (ADO). The specific definition of the Epic, Feature, User Story, and Task must be determined in the planning phase of the Build and Implement phase of the project. This includes acceptance criteria, business rules, exception processes, data requirements, UX designs. Test Cases must be created and stem from Feature and User Story level work items and their related acceptance criteria. Test Cases may be at a Task, User Story or Feature level and may be grouped to test process flows across stories or Features. Non-Functional testing can follow this approach or use more traditional documentation to provide detailed requirements. Please see the illustration below for a depiction of the hierarchy that will be used within ADO.



7.2 Testing Scope

The Contractor must deliver the following for the KM Solution:

Testing must be performed on all components, capabilities, and functionality delivered for the KM solution as identified in Appendix B – KM Tool Business Requirements. This includes testing of solution functionality, UI, integration with external systems or web services, workflows, business rules, access management to confirm all users have required access rights and permissions, and reporting.

All testing types mentioned below must be leveraged and applied during the design and development of all components, capabilities, and for all functionality delivered throughout the KM Solution. This includes at least one cycle of end-to-end system and functional testing (e.g., not just testing in sprints) at the end of design and development for all functionality used by the KM Solution.

Regression testing must be performed on an on-going basis throughout development including regression testing of all integrated components that form the KM solution, including where they are not directly modified by a release and following defect remediation. Regression testing must make use of test automation to the extent possible to allow for test repetition and timely execution.

Below is a breakdown of the various testing types which are in-scope for the KM initiative, taking place throughout the testing lifecycle.

7.2.1 Functional Testing Types:

Testing Type	Definition
Unit Testing	Testing included as part of the development cycle to ensure that the individual components (units) meet their design and behave as intended for all the configuration & customization including the integration development.
Sanity Testing	Testing of the UI to ensure user functional requirements have been delivered, and to ensure proper usage of spelling, capitalization, spacing, etc., are in alignment with requirements/User Stories
Smoke Testing	Testing to verify the stability of the solution which is to be performed prior to deployment of a build into a test environment and to ensure that critical functionalities are working as expected.
Functional Testing	Testing that ensures features within the solution are working according to requirements and design specifications. This testing typically includes testing according to specific defined business scenarios. The intention of this testing to try to “break” the system, including ‘boundary testing’ (i.e., testing between extreme ends of conditional statements or decision gateways in the solution), and ‘negative testing’ (i.e., testing using intentionally invalid data inputs). This testing also includes testing the positive flows of discrete system components to ensure the component (e.g., UI, process flows, routing rules) addresses requirements.
System Integration Testing (SIT)	SIT ensures several systems or sub-systems come together and are integrated correctly end-to-end to perform a required business function. This includes integration between multiple components of the KM solution, ancillary systems that are part of the overall solution, and integration with other systems or services within ESDC.
Regression Testing	Testing that ensures new sprints and new builds do not break previously tested and working components.

Data Migration Testing - Quality and Accuracy	Testing performed using a variety of techniques including, but not limited to, database queries including metrics comparisons, and data scans to verify the quality, accuracy and integrity of data that has been migrated from the Legacy Systems into the new solution (this includes historical data in the support of KM).
Data Migration Testing - Solution Function	Functional testing performed in the new solution that uses migrated data within the test scenarios to ensure that the new solution functions properly.
User Acceptance Testing (UAT)	Owned and performed by the business owner (i.e., ESDC). This involves testing the full scope of the KM Solution. This test includes covering all technical platforms included in the solution (including any ancillary components). This test cycle leverages real life business process that will validate that the solution meets the business needs, including validation of correct alignment of new operational processes with how the solution works and that training materials properly reflect the new processes in the new solution.

7.2.2 Nonfunctional Test Types

Testing Type	**Definition**
Performance Testing	Testing that measures the responsiveness, stability, scalability, reliability, speed and resource usage of the software and infrastructure. This test compares the results to a pre-defined set of expectations/metrics to identify issues requiring resolution and to make additional recommendations on overall improvements. Testing those measures how systems, such as integrations and large reports, function under many concurrent virtual users performing transactions over a certain period. This test compares the results to a predefined set of expectations/metrics to identify issues requiring resolution and to make additional recommendations on overall improvements.
Official Languages Testing	Testing to ensure that all UI are fully functional in both English and French.
Cross Browser Testing	Testing the KM solution in multiple browsers (Desktop: Edge, Firefox, Chrome and Smartphones and tablets: Safari, Chrome, Firefox) to validate that the solution functions correctly regardless which browser is used
Usability Testing	Testing to validate ease of use / usability of the solution (prototypes used for the usability testing) to enable early identification of issues that need resolution.
Accessibility Testing	Testing to validate that the KM solution meets the Government of ESDC Accessibility requirements as defined Non-Functional Requirements in Appendix D – ICT Accessibility Requirements.

Deployment Testing	Testing to validate and confirm the deployment processes. This test ensures that deployment processes will run smoothly when the final deployment to production is completed. Testing rollback process(es) in the event of rollback is necessary.

7.2.3 Test Automation Approach

The Contractor must develop a Test Automation Framework to show a high-level conceptual model for automated testing and its integration into the overall testing of the KM solution. The Contractor must develop a low-level Test Automation plan to describe what types of testing are in scope of automation (e.g., SIT, Regression, Performance, Load), how automated testing will be conducted, the stages of the development lifecycle where automated testing will apply, and how the results of automated testing will be managed and reported.

The Contractor must enable test automation, over the project duration, including creation of test cases and scripts for reuse in System Integration Testing and Regression Testing throughout the Task Authorization (TA) period. The Contractor must also enable test automation for continued use by the BDM Program (including provision of knowledge transfer/training) upon formal handover/transition, with the level of automation as set out by the Test Automation Requirements below, to be met at project completion/handover.

Testing Type	**Test Focus**	**Test Automation Scope**
System Integration Test (SIT)	Testing integration points with APIs, ancillary systems, and Partner and Legacy Systems to ensure several systems or sub-systems come together and communicate correctly end-to-end to perform a required business function.	The Contractor is expected to Automate SIT test cases (recommended at least 60% of the build). The Contractor can recommend a variation of this percentage, which will be subject to review and approval by ESDC.
Regression Test	Ensuring new sprints or builds do not break previously tested and working functions.	The Contractor is expected to Automate Regression test cases (to at least 80% of the SIT test cases). The Contractor can recommend a variation of this percentage, which will be subject to review and approval by ESDC.
Performance Test	Performance testing will evaluate the speed, responsiveness, and stability of the solution. The Contractor must report on the measured performance and identify any performance-related	The Contractor is expected to Automate the performance testing and use the performance testing tools available within ESDC, to support the performance test

	bottlenecks and develop a plan to remediate them.	
Load Test	Ensuring that the solution can handle the maximum number of expected concurrent interactions with the full number of users logged in and to simulate what happens to users when the maximum threshold is hit.	The Contractor is expected to simulate the needed volumes. The Contractor is also expected to simulate having the full 15000 officers logged into the system concurrently.

The Contractor must develop a Test Automation Framework including a high-level conceptual model for automated testing along with its integration in the overall testing of the KM solution. Test automation for the SIT, Regression tests must be delivered using the Test Automation Framework.

Automation of other testing types such as Performance, Load, Accessibility, etc., may also leverage other approaches and tools outside of the test automation framework.

7.2.4 Quality Gates

There are various criteria that are implemented throughout the Testing process that are meant to validate that each Feature/User Story and Testing Phase are hitting certain requirements that define the readiness of an item/phase to start execution and completion of an item/phase.

The prerequisites for starting and completion are divided into 3 defined categories: Please refer to Appendix C – Agile Procurement with Value Points for more information on the Agile procurement process.

1. Definition of Ready (DoR) for Feature level items.
2. Definition of Done (DoD) for User Story level items.
3. Entry and Exit Criteria for Testing Phase levels.

Definition of Ready and Definition of Done – Feature/User Story Level

Definition of Ready (DoR) - Defines readiness for design for a Feature level work item, to enable to progression to the next phase and create the ‘Design Documents (FDD/IDD/TDD). The Contractor must create an FDD/IDD/TDD for which the DoR serves as a readiness indicator. ESDC PO (Product Owner) needs to approve the Definition of Ready for each Feature.

Definition of Done (DoD): Refer to Appendix C – Agile Procurement with Value Points Section 3.0 for the Definition of Done for User Stories.

All functionality and its requirements need to be reviewed, documented, and approved by ESDC prior to beginning development work. The User Stories will be considered completed and flagged for payment, only when the definition of done has been achieved.

Entry & Exit Criteria - Test Phase Level

The Entry & Exit criteria define what conditions that must be met for a Test Phase to be considered ready to start execution (Entry) and what “boxes” need to be checked for the Test Phase to be considered “Done” and ready to be marked as completed (Exit).

Notes:

a. SIT Testing phase needs to have a defined Exit Criteria only**.**

b. UAT Testing Phase should have defined both Entry & Exit Criteria.

c. Other phases do not require a defined Entry or Exit criteria.

d. Decision on approval to enter/exit a phase is a collaborative effort between ESDC product owner and Contractor Lead.

7.2.4.1 SIT Approach

Exit Criteria:

1. All Test Cases within the phase have been executed.

2. No outstanding Severity 1 or Severity 2 defects remain.

3. The Contractor and ESDC have mutually agreed upon and documented an action plan to address all Severity 3 and 4 defects within the projects time frame.

4. The environment for the next phase is set up (if applicable).

5. The testers for the next phase have the necessary access and knowledge to start the next testing phase (if applicable).

6. A documented report with the statistics, findings and outstanding defects is sent to the relevant business stakeholders.

NOTE: Refer to Section 7.2.6 Defect Management' of this SOW for the Defect Severity Definitions.

7.2.4.2 User Acceptance (UAT) Approach

ESDC owns and will lead the UAT. ESDC is responsible for:

a. UAT planning, including defining the scope, approach, participants, and intent of UAT, identifying/creating the test scenarios, creating test cases, identifying required test data, executing test cases, and identifying/prioritizing defects.

b. UAT scheduling, including - informing the Contractor regarding a timeline needed to complete the UAT.

c. UAT execution, including - approving UAT entry readiness, executing test cases, logging defects (including environmental issues), triaging defects (setting the defect priority), retest the fixes.

d. Communication regarding Exit Criteria completion through an UAT exit report.

The Contractor is responsible for:

a. Supporting the UAT environment and ensuring that the environment is accessible to UAT testing resources.

b. Communicating to ESDC as soon as possible on any UAT environmental issues, problems or impacts that are being encountered in the back-end logic/code.

c. Creating test data to be leveraged in KM solution testing as defined by ESDC for scenarios where data must first be set up in the solution. ESDC will review the possibility of providing some data that will be the production data.

d. Reviewing defects, sequence all fixes, resolve/fix the defects (resolution of all defects to meet the Exit Criteria), perform regression tests around fixes, and document path to resolution/next steps for all outstanding defects (as agreed by ESDC).

e. Leveraging of AI enablers such as AI powered user journey simulations where AI models predict user navigation using knowledge queries, as appropriate.

f. Consulting with and support ESDC on its overall testing effort.

UAT Entry Criteria:

UAT test environment is available, access is granted to the UAT testing resources and is ready to use.

The Contractor must ensure that the UAT environment must be stable and unchanged once testing starts. The Contractor must ensure a code/configuration freeze and any change or code fix because of critical defects may only be approved by ESDC.

1. Software solution and all agreed scope Features have been developed, and latest code version is deployed to UAT environment prior to execution.

2. All earlier phase testing activities have been completed.

3. No outstanding Severity 1 or Severity 2 level defects.

4. UAT team has been identified.

5. UAT Test Cases have been pre-written.

6. UAT team has received adequate access, training, and context about outstanding tasks.

7. Sign off from SIT Testing team + detailed hand off report sent to ESDC stakeholders.

UAT Exit Criteria:

1. All UAT Test Cases have been executed successfully.

2. No outstanding known Severity 1 or 2.

3. The Contractor and ESDC have mutually agreed upon and documented an action plan to address all Severity 3 and 4 defects within the projects time frame.

4. The product is confirmed to meet all business requirements.

5. UAT team sign off on successful completion of the testing phase.

6. A UAT Completion Exit Report is generated and distributed to all relevant stakeholders.

NOTE: Refer to Section 7.2.6 Defect Management' of this SOW for the Defect Severity Definitions.

ESDC will supply appropriate resources for the planning and execution of UAT. ESDC will approve the UAT entry readiness based on the foundational criteria mentioned above and the Contractor's SIT closeout report.

The Contractor must define a release Backlog. The release Backlog must include all active (not closed) defects discovered prior to Go-Live.

For each defect, the release Backlog must include:

a. Defect details - a clear explanation of the issue/problem, including number, title, severity, priority, and category (as required).

b. Instructions for applicable workarounds.

c. A proposed delivery release alignment (i.e., when the defect fix (including the regression test around the fix) is planned to be released).

d. Where the fix is not within the Contractor's control to resolve, ESDC will assist in the assignment of resolver. The Contractor must provide further information such as requested delivery date to meet proposed delivery release alignment.

Unless otherwise agreed by ESDC, the release Backlog must have no Severity 1 or Severity 2 unresolved defects and the release Backlog (including the cumulative impact of open defects) must have been agreed by ESDC.

The Contractor must resolve defects in accordance with the schedule set out within the release Backlog. Except where agreed otherwise, or subsequently de-prioritized by ESDC, all defects in the release Backlog must have been closed prior to Transition.

7.2.5 Test Optimization Approach

Test and Optimize

The Contractor must design, develop, plan, and execute testing (with the exception of User Acceptance Testing) based on the above specified types of testing and aligned to project testing timelines to validate the KM Solution.

7.2.5.1 Test Strategy and Plan

The Contractor must:

Develop a Test Strategy that:

a. Demonstrates the intended strategic approach(es) for testing, highlighting how the approaches will ensure on-going quality and stability of the solution throughout development, enabling Agile testing methods in alignment with the testing types and testing details outlined in the SOW.

b. Demonstrates how the Contractor must ensure that the solution meets KM requirements and acceptance criteria.

c. Demonstrates how the Contractor must enable on-going visibility and transparency with the testing progress and results including how the Contractor must coordinate Defect Management processes and identify key environments and dependencies for testing.

d. Develop a Test Plan that must:

   i. Define the tactical plan regarding how the KM Solution will be tested in line with the Test Strategy and requirements.

   ii. Identify data requirements, relevant environments, and testing schedule timeline for testing of the KM Solution.

   iii. Outline the high-level timelines for how all testing phases/types, activities and tasks will be incorporated into the overall KM initiative project plan.

   iv. Identify which tests will be automated and manual including how both automated and manual tests will have an equivalent level of documentation, reporting, and traceability.

   v. Document and provide a Requirements Traceability Matrix. The traceability matrix should provide traceability of the test cases and their results to the User Stories and/or requirements for reporting on the overall system wide test completeness.

   vi. Provide a Test Environment management Plan that must align with the environment

With the intended goal of documenting Contractor testing obligations in this document, all test types described in the SOW are to be included in the Test Strategy and Test Plan delivered by the Contractor.

7.2.5.2 Test Preparation

The Contractor must complete the following test preparation activities:

a. Develop all Test Cases, Scenarios, Scripts and Data required to perform the identified testing, based on ESDC's KM business and IT requirements and in alignment with the SOW.

b. Provide accurate tracking of, and reporting on, test case and/or test script development and progress to provide transparency to ESDC regarding the content of the planned tests, readiness for testing along with testing progress and outcomes.

c. Manage test data for any data required for the KM Solution to be used in the testing cycles of all in scope testing types, including data required for acceptance testing which is the responsibility of ESDC; (i.e., with the exception of Legacy System data which will be provided and managed by ESDC).

The management of test data includes:

   a. Defining the test data requirements in collaboration with ESDC.

   b. Creating the test data for the KM Solution.

   c. Creating processes that enable the Contractor to manage the test data such that it can be reset or reapplied for new test cycles and/or where a given test needs to be repeated.

   d. Designing, configuring, instantiating, preparing, administering, and managing production and non- production environments required by the Contractor and ESDC to enable all testing for the fulfillment of KM solution requirements within ESDC's up to and including Medium Confidentiality, Medium-Integrity, and Medium Availability (PBMM) Cloud tenancies.

7.2.6 Test Execution

The Contractor must complete full testing life cycles for implementation of the KM Solution as described within the scope of this Task Authorization and in alignment with the testing types and testing details outlined in the SOW.

To align with Testing types and details required, the Contractor must complete the following test execution activities:

a. Execute all the test cases and/or automated test scripts for all testing types as defined in the SOW, covering the full scope of the KM Solution.

b. Provide comprehensive and complete documentation for testing results including analysis of the actual results versus the expected testing results.

c. On-going maintenance of the current requirements traceability matrix referencing test cases and results.

d. Document and report on defects found during testing.

e. Lead the Defect Management Process.

f. Conduct complete system integration tests, including testing with stubs (where required) and, the target system. Where integration occurs with “partner” systems and when, the testing approach must be coordinated with the owners of the partner systems. This last stage of integration testing extends beyond a point-to-point testing by focusing on testing of the function within the overall solution that triggers the integration point which ensures that the entire function works as required from beginning to end. Where the defect originates in a partner system (outside of the KM Solution) ESDC will coordinate the defect resolution with those third parties, in alignment with the timelines required by the Contractor and with support from the Contractor, where applicable.

g. Provide accurate tracking of and reporting on defects identified through testing as well as leveraging tools and processes provided by ESDC (e.g., Azure DevOps); and

h. Report on the status of test execution including:

i. Scope

   i. # of Sprints

   ii. List and # of use stories for each Sprint

   iii. # of test cases for each user story

j. Summary of progress of test cases execution,

k. Percent completion of testing progress (i.e., Pass, fail, N/A, executed, not run, postponed),

l. Defect summary breakdown by status and severity / priority, Defect summary breakdown by functional area; and Trending graphs.

On completion of each test type / phase (System Integration Test, Performance/ Load Test, Unit Test) the Contractor must provide the ‘Test Type/Phase Closeout Report’, which must include known risks, defects and available workarounds, and a Defect Resolution Plan to describe how the Contractor must resolve outstanding defects (if any).

The Contractor must define the entry and exit criteria of each test phase in the 'Test Strategy'. Any modifications to those criteria during delivery (if deemed necessary via the Project Management Control Process), must be captured in a new version of the Test Strategy.

7.2.7 Defect Management

The Contractor must define and manage the defect management process, including conducting defect analysis, proposing remediation options and recommendations, and implementing agreed-upon remediation actions. All remediation activities must be reviewed and approved by ESDC. The Defect Management process is to be defined in the 'Test Strategy' that must be submitted as a deliverable by the Contractor for approval by ESDC.

Defect Severity Definitions

Severity	Definition	Example
Severity 1- Critical	• Major fault causing serious disruption to business activity and preventing use of the application for the purposes it was designed. • System Failure. No further processing is possible, and no workaround exists. • Severe impact	Complete lack of system availability, functionality, performance, or usability.
Severity 2 - High	• Unable to proceed with selected functionality or dependent functionality. • A critically supported function of the application is down, degraded, or unusable or time sensitive issue important to long-term productivity that is not causing an immediate Work stoppage with: • A potential severe impact on service delivery. • An acceptable alternative or bypass or workaround is available. • Major impact.	Sub-system unavailability, key component unavailable or functionality incorrect.
Severity 3 - Medium	• Restricted functional capability, however processing can continue.	Non-critical component unavailable or functionally incorrect; a workaround is available.

	• A non-critical function of the application or procedure is down, unusable, or difficult to use with: • Some operational impact. • No immediate impact on service delivery. • An alternative or bypass is available. • Minor impact. • Sensitive language or KM Taxonomy issue e.g., English appearing on French screen or incorrect translation updated.	
Severity 4 - Low	• Minor Cosmetic Changes. • Cosmetic or nice-to-have that has no impact on a process and does not prevent any test script from being executed. • No impact.	Usability errors, screen or report errors that do not materially affect quality and correctness of function, intended use, or results.

Defect Priority Definitions

The following defect priority definitions apply for all testing conducted as part of the KM solution.

Priority	Definitions
P1 - Very High	The defect has a significant effect on testing. It may be a minor correction, but without it, testing cannot continue.
P2 - High	The defect impacts the progress of testing but does not halt it completely. Other testing can continue for unrelated configuration.
P3 - Medium	The defect has minor business impact and affects only a non-critical business process. An alternative solution or Work around exists, and testing can proceed.
P4 - Low	The defect has no business impact, is cosmetic, is nice-to-have or is an optional feature and does not prevent any test script from being executed.

7.2.8 Non-Functional Testing: Performance and Load testing

The Contractor must:

a. Design, develop, plan, and execute Performance and Load testing to ensure that Non-Functional Requirements (NFR) are met. The Contractor must perform this Work in consultation with relevant ESDC teams contributing to the new KM solution.

b. Create Test Plan(s) reflecting required testing types, approach(es), roles and responsibilities, and data requirements, that are subject to Project Authority (or designated representative) review and approval in accordance with Appendix F – KM Deliverables.

c. Ensure Performance and Load Test Plans include the following:

   i. Overall Test Plan and approach

   ii. Cycles plan

   iii. Approach to test data management (e.g., volumetric scenarios reflective of Performance and Load testing requirements)

   iv. Test pass/fail criteria

   v. Test execution metrics

   vi. Test execution dependencies and assumptions; and

   vii. Test reporting.

d. Creating Performance and Load test scripts and execution along with the tools required to run and execute these tests as described in the Test Plan approved by the Project Authority (or designated representative).

e. Provide Performance and Load test reports, including:

   i. Summary breakdown of pass and fail based on acceptance criteria related to the volumetrics

   ii. Summary of the test case execution progress

   iii. Percent completion of testing progress (pass, fail, n/a, executed, not run, postponed)

   iv. Open defects and the required plan for progression

   v. Trending graphs

   vi. Issues encountered

   vii. Assumptions proved or disproved and

   viii. Recommendations on how to improve the outcomes.

7.2.9 Data Migration Testing Approach

ESDC will extract the data/knowledge articles from the current / Legacy System(s), and the Contractor must transform, consolidate, and import the data into the new KM solution.

The Contractor must:

a. Utilize and tap into various AI enabled tools and technologies that will enable successful consolidation and transformation of the data;

b. Identify and define the User Stories that could be used for the AI enablement;

c. Clearly detail the implementation of the User Stories and the testing approach; and,

d. Plan and execute the data migration testing.

This testing will have different key resources involved, different tools, different approaches, and different timelines/test cycles from the KM Solution Testing.

7.2.9.1 Quality and Accuracy

The Contractor must plan Quality and Accuracy testing activities for Data Migration as per functional and business requirements.

The Contractor must execute quality and accuracy testing of data migration to ensure that:

a. The data is migrated wholly and accurately, following the consolidation of data from multiple sources.

b. The data has the correct mapping to the program and KM Taxonomy.

c. The data has been transformed accurately, and

d. That the quantity and period of history of data is correct and

e. The quality of the data is in usable format.

The Contractor must execute the following activities in preparation for testing:

a. Consult with ESDC to define an approach for data migration testing and how the results will be reported.

b. Plan and execute data integrity testing, including data accuracy checks and field validations.

c. Identify the key volumetrics that will be used to ensure that all the required current system(s) data records have been migrated accurately into the KM solution.

d. Identify candidate data values for accuracy testing particularly for those data values that do not have a 1 to 1 field mapping from current system(s) to KM solution. Identify any values that have a high risk of inaccuracy regardless of any possible 1 to 1 filed mapping.

e. Define a decision/accountability/governance process by which decisions can be made and tracked to correct any issues.

7.2.9.2 Solution Functional testing

The Contractor must plan and execute Data Migration Solution Functional testing to ensure that the KM solution behaves as required with the migrated data specified in the functional and business requirements. This testing must be performed by the Contractor using functional tests that use migrated data to test, navigate and enable search functions.

7.3 General Testing Dependencies

The Contractor is dependent on ESDC to ensure that internal and external partners are available to support all testing activities defined in the Test Plan in alignment with the KM Solution Implementation schedule.

8 Deployment Methodology

8.1 Create Deployment Strategy and Roadmap (WP-06.12)

The Contractor must configure and develop the KM solution and the AI enablement's and successfully deploy them to production including all necessary testing.

The KM Solution release strategy must identify the assumptions, guiding principles and constraints that must be used to for the approach to implementing the new KM solution independent from the current Legacy Systems. Additional information must include the breakdown of the user requirements in specific releases, their timelines and any dependencies that are appropriate.

Before any release to production—including MVPs—and after all testing activities and approvals are complete, a pre-production 'pilot' environment using test production data must be established to support final evaluations and User Acceptance Testing (UAT).

The Contractor must identify and illustrate the sequence of environments that will be used in the code promotion strategy.

The Contractor must design and execute the Deployment roadmap to:

a. Maintain business continuity & mitigate risks (technological, operational, political, etc.)

   i. The Contractor’s release to production approach must consider areas of potential risk and provide mitigation strategies to ensure impacts are minimized, service officer productive is not affected, and ESDC is able to respond quickly to any service interruption.

b. Consider service experience and complexity trade-offs within the Contractor’s release to production approach. It is acceptable in the short-term to adjust service-level standards and/or KPIs to reduce complexity and risks if there is a clear plan to demonstrate how and when service improvements will be achieved. Demonstrate value early and deliver benefits quickly but not at the expense of quality.

   i. The Contractor must execute a series of incremental capabilities described for each release to maintain stakeholder confidence through the use of sprint and executive showcases and progress reports.

c. Deploy the KM Solution releases without impacting service delivery to citizens.

   i. The Contractor’s data conversion, validation, and fall-back mitigation options ensure that ESDC continues to provide a high level of service to Canadians.

d. Deliver with an Agile mindset - leverage incremental deliveries with a predictable outcome to ensure integration across streams.

   i. The Contractor must apply a ‘Measure as you go’ approach to test and monitor deployments, releases, and benefits through ongoing measurements (e.g., deviations between the old systems and new system), and adjust deployment and release plans throughout, and

   ii. Scheduling staff to Work in potentially one or both systems; additional general operational churn for staff; additional effort related to varying operational and workload management reports and direct workload management across two systems; additional effort to consolidate workload reports/statistics and measurement of KPIs for GoC.

8.2 Deployment Setup and Maintenance

The Contractor is responsible for configuring, maintaining, and optimizing deployments for the efficient deployment of software to various environments (e.g., development, staging, and production). This includes integration with automated testing tools and Test Plans.

The Contractor must conduct deployment rehearsals for major releases, as well as adhere to established change control processes within ESDC, which may include appearances at appropriate advisory boards.

8.3 Collaboration with Project Teams

The Contractor must collaborate with product owners, development teams, and QA teams to ensure the release process aligns with project principles, standards, and guidelines. This includes participating in regular stand-ups, release planning ceremonies, sprint planning meetings, and retrospective reviews to incorporate feedback, manage expectations, and adjust release strategies, as necessary.

8.4 Additional Deployment activities

The Contractor must carry out the development activities and ensure that the development aligns with the architectures, design, and business requirements.

The following must be delivered in support of development activities:

a. Environment Management Strategy and Plan (WP-06.13)

b. Code Promotion Strategy and Management (WP-06.14)

8.4.1 Environment Management Strategy and Plan (WP-06.13)

The Contractor must develop the environment strategy and plan. The strategy defines the required environments at various points in the development life cycle, and describes their key characteristics and high-level plan for their use and must:

a. Define environment strategy (training, DEV, TEST, PROD, etc.),

b. Align with best practices that will support data migration strategy;

b. Identify which integrations are required in which environment, if applicable;

c. Analyze the data segregation requirements, if applicable;

d. Identify the access controls and separation of duties;

e. Detailed information for the environment data;

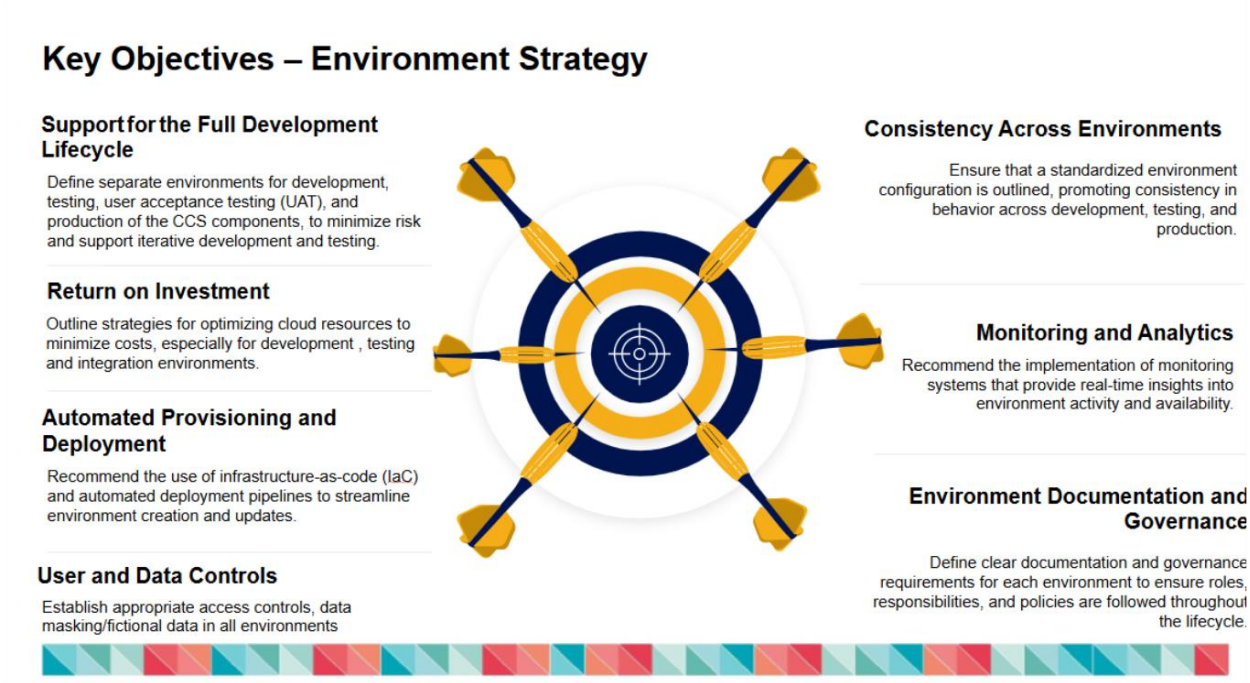
f. Define the deployment strategy;

g. Document the strategy and plan;

j. Ensure comprehensive monitoring and real-time visibility into all environments (development, testing, production) while maintaining operational performance, security, and compliance and Environment governance framework; and

j. Define the environment monitoring and management framework and plan.

Illustrated below are other aspects that must be included in the strategy and plan.



8.4.2 Code Promotion Strategy and Management (WP-06.14)

The Contractor must design and document the promotion management strategy that outlines the key aspects to be used to promote code developed within the project. This document must serve as a guide to development and DevOps/DevSecOps teams regarding the processes to be followed.

The primary audience for this document is development team resources and DevOps/DevSecOps who support deployment of code across the project. The ESDC team who will be validating and applying quality gates as the code is being promoted across the development, production, and support lifecycles.

The Contractor must (in consultation with ESDC) design, document and implement code management processes for a multi development stream model. The model must include:

a. Code check-in;

b. Tagging;

c. Merge strategy;

d. Code acceptance;

e. Change commit;

f. Conflict resolution; and

g. Design, document, and implement repository configuration including branching patterns and backout strategies.

The Contactor must develop the promotion schedule and conditions to be met for the promotion of code into other environments. This must include:

a. An integration builder that runs each time a developer checks in code; and

b. A nightly builder that runs each night, builds all check-ins from all developers that day and deploys them to a nightly environment for development and test.

8.4.3 Security

The Contractor must work with ESDC to ensure the solution is secured to the proper accreditation level necessary to go live. The security level is Protected B. Accreditation must be implemented accordingly. ESDC will work with the Contractor accordingly, for the Authority to Operate and other security compliance requirements.

The following must be delivered in support of development activities. In the case where ESDC is the lead for these security governance processes; the Contractor must provide the support required for its completion:

a) Operational Security Procedures (WP-06.15)

b) System Security Strategy (WP-06.16), including:

   i. System Security Plan;

   ii. Security Incident Response Plan);

   iii. Security Controls Traceability Matrix; and

   iv. Security Controls Evidence.

The Contractor must deliver the completion of operational security procedures document and a system security plan that are in accordance with the security obligations as defined in the requirements and consistent with the solution architecture. that are in accordance with the security obligations as defined in the requirements and consistent with the solution architecture.

The Contractor must deliver/support a security incident response plan applicable to their configuration, development, and operational support.

The Contractor must deliver/support a security control traceability matrix (SCTM) to ensure that security obligations are met and identifies gaps and maintain accountability throughout the lifecycle of a system. The SCTM must map and track security controls to various requirements, standards, or regulations in a project or system. It ensures that all security controls (e.g., technical, administrative, and physical controls) are adequately addressed throughout the system development lifecycle.

Security for the personnel must follow the guidelines outlined in this TA.

8.4.4 Privacy

KM information privacy requirements are derived from current ESDC information privacy needs and Canadian Information and Privacy Legislation, Regulation, and Policy, linked here:
Privacy Act
Policy on Privacy Protection- Canada.ca
Directive on Privacy Practices- Canada.ca
The Contractor must ensure the KM solution is configured and provisioned in accordance with Canada Privacy requirements. Any configuration is to be done in a manner that it adheres to the Privacy by Design Foundational Principles.

8.4.5 Integration

Currently the scope for this project does not include any integrations with other systems. But the planning, design and the development work packages would be required to enable the potential integrations at a later time. Hence the scope must include the definition and creation of APIs that could be utilized in future integrations. Future work could include integration of the knowledge management solution with the various other technologies in the BDM architectural landscape, such as EI on the Cúram platform, Contact Centre as a Service (CCaaS) etc.

Please refer to Appendix M – Proposed Architecture with Integration Points for future potential integrations.

9 Out of Scope

The following are defined as out of scope for this requirement,

a) BERT – the reporting tool that might be referenced in other documents, is out of scope.

b) Overhaul of unrelated IT systems not directly interfacing with the KM solution.

c) Training external partners or stakeholders not involved in KM operations.

d) Changes to organizational policies or procedures not related to KM operations.

e) Infrastructure upgrades outside the immediate needs of the KM implementation.

f) The KM tool selection as ESDC will provide the selected tool.

10 Roles and Responsibilities

This section outlines the high-level areas of responsibility, associated stakeholder duties and expectations for each stakeholder involved in the KM Initiative These are outlined to ensure clear communication and accountability throughout the implementation, migration, and transformation process for the Project.

Transformation

a. Board

b. Steering Committee

c. Contractor

Oversight

a. ESDC Project Authority (or designated representative)

b. ESDC Project Manager Centralized Knowledge Management Solution

c. Contractor Project Manager

Product Development

a. ESDC Product Manager

b. ESDC Product Owner

c. ESDC Collaboration Team

d. Contractor UX

Technology

a. Shared Service Canada (SSC)

b. ESDC - Innovation, Information and Technology Branch (IITB), Chief Data Officer Branch (CDO), Chief Transformation Officer (CTO), Enterprise Architecture Review Board (EARB)

c. Tech Contractor

d. Software Vendor

Business Readiness

a. ESDC Readiness Team

b. Contractor Business Readiness

c. HQ (KM teams, IITB)

d. Business Expertise

Impacted Groups

a. Knowledge Management

b. Contact Centres

c. Processing Centres

d. In-Person Centres

e. Integrity Operations

f. Clients

Product Accessibility Conformance

a. ESDC Product Manager: Commitment to meet conformance
b. Business Accessibility Lead: Manages accessibility initiatives.
c. ESDC IT Accessibility Office (ESDC-ITAO): Manages accessibility compliance initiatives.
d. Platform Vendor: Ensures platform accessibility conformance.
e. Platform Accessibility Subject Matter Expert (SME): Attend defect triages, analyse the issue, responsible to provide progress on platform defect resolution, provide roadmap.
f. Contractor Accessibility Lead: Oversees workload, progress, risks, and team collaboration; requires accessibility knowledge.
g. Contractor Accessibility Subject Matter Expert (SME): Must have Web Accessibility Specialist Certification or 8-10+ years of complex testing experience; responsible for test case identification, result review, and vendor support.
h. Contractor Accessibility Testers: Requires 2+ years of experience in complex accessibility testing.

11 Appendices

The following appendices are considered point in time documents. If and when required, ESDC will provide the Contractor with updated versions of the documentation to ensure the Contractor has access to the most current information.

Appendix A - Acronyms and Glossary
Appendix B – KM Tool Business Requirements
Appendix C – Agile Procurement with Value Points
Appendix D - ICT Accessibility Requirements
Appendix E – **Has been intentionally removed**
Appendix F – KM Deliverables
Appendix G - Resource Categories and Responsibilities
Appendix H – Proposed Delivery Approach and Governance Model
Appendix I – User Story template
Appendix J – Technical Details of Individual KM tools
Appendix K - SharePoint Addons
Appendix L - ESDC Approved Tools
Appendix M – Proposed Architecture with Integration Points
Appendix N – Proposed Migration Roadmap
Appendix O – **Has been intentionally removed**
Appendix P - Stakeholder Engagement Communication Standards
Appendix Q – BDM Change Management Strategy
Appendix R – Change Management Process
Appendix S - BDM ARC - BDM Architecture Principles Update - November 2020

Appendix T – AssistMe Background Information - *provided as a reference document only and is included in this procurement to assist the Contractor in carrying out the work.*

Appendix A: Acronyms and Glossary

The Acronyms and Glossary that apply to this requirement can be found below. For all other list of terms refer to the Master System Integration Contract.

Acronyms

Acronym	Full Name
ADO	Azure DevOps
AI	Artificial Intelligence
BDM	Benefit Delivery Modernization
CIA	Change Impact Assessment
CM	Change Management
COTS	Commercial Off the Shelf
CPP	Canada Pension Plan
EI	Employment Insurance
ESDC-ITAO	ESDC IT Accessibility Office
ICT	Information and Communication Technology as defined in EN 301 549 V3.2.1 (2021-03)
IITB	Innovation & Information Technology Branch
MINO	Minister's Office
MSIC	Master System Integration Contract
NHQ	National Head Quarters
NSD	National Service Desk
OAS	Old Age Security
OLA	Official Languages Act
OOTB	Out of the Box
PAITS	Privacy Analysis for IT solutions
PMA	Project Management Advisor
PMAS	Programme Management Advisory Services
PMIS	Project Management Information Server
PM CoP	Project Management Community of Practice

PMIS	Project Management Information System
PPCRs	Project Change Requests
RAIDD	Risk, Action, Issues, Dependency, and Decision
RBAC	Roles Based Access Control
RMAC	Resource Management Approval Committee
RoD	Record of Decisions
SDH	Service Delivery Hub
SDLC	System Development Lifecycle
SDN	Service Delivery Network
SME	Subject Matter Expert
SSC	Shared Services Canada
TARB	Task Authorization Review Board
TBS	Treasury Board Secretariat
TPB	Transformation Project Board
WCAG	Web Content Accessibility Guidelines

Glossary

Agile	A project management and product development methodology that emphasizes iterative progress, collaboration, and adaptability. Agile promotes delivering work in small, functional increments, allowing for continuous feedback, stakeholder involvement, and the ability to respond quickly to change.
Agile Product	An Agile Product that satisfies ESDC's Business Needs. An Agile Product delivers value to the stakeholders (internal or external) and has a clear boundary, customers and achieves some measurable value. A tangible product is a physical object that can be perceived by touch such as a building, vehicle, gadget, or clothing. An intangible product is a product that can only be perceived indirectly such as an insurance policy.
Agile Product Management	A people-and-user-focused philosophy to deliver the right output, sooner. In Agile software development, product management is about guiding a product through multiple Iterations. Since Agile programs are more fluid than traditional approaches, Agile Product Management is a more flexible approach.

	One of the core concepts in Agile is that the scope of a project is fluid, while resources stay the same. As such, in Agile Product Management the team spends less time defining the product beforehand and is open to changes along the way. The product comes together one Iteration at a time, allowing for customer data and team retrospectives to drive the next stage. As such, Agile Product Management is more about guiding the development team through cycles, while maintaining the product vision and integrating customer insight along the way.
Agile Release Train (ART)	A long-lived team of Agile teams, which, along with other stakeholders, incrementally develops, delivers, and where applicable operates, one or more solutions in a value stream.
AI Capabilities	AI capabilities encompass a broad spectrum of tasks and functions that artificial intelligence can perform. Within the context of enterprise knowledge management, these capabilities can be leveraged to enhance various functions—such as implementing intelligent search features that improve information retrieval and accessibility
Backlog (Product)	A list of the new features, changes to existing features, bug fixes, infrastructure changes, or other activities that a team may deliver to achieve a specific outcome. The product Backlog is the single authoritative source for things that a team works on. That means that nothing gets done that is not on the product Backlog. Conversely, the presence of a product Backlog item on a product Backlog does not guarantee that it will be delivered. It represents an option the team has for delivering a specific outcome rather than a commitment.
Critical	Refers to elements, tasks, or factors that are essential to the success or timely completion of the project or deliverable.
Data Mapping	The process of matching fields from one database to another. It is the first step to facilitate data migration, data integration, and other data management tasks. Before data can be analyzed for business insights, it must be homogenized in a way that makes it accessible to decision makers.
Data Readiness	The state of the readiness of data for a particular use. Data readiness levels of the given data set to be used in the project can help project stakeholders take proactive action for risk mitigation if any due to lack of proper data.
Design System	A complete set of standards intended to manage design at scale using reusable components and patterns.
DevSecOps	Development, Security and Operations. A framework that integrates Security into all phases of the software development lifecycle.
Employee	A person who is paid to Work by an employer

EN 301 549	"EN 301 549" is an Accessibility Standard and means the EN 301 549 V3.2.1 (2021-03) Harmonised European Standard Accessibility requirements for ICT products and services or the most current version.
Enabler	Backlog items that extend the architectural runway of the solution under development or improve the performance of the development value stream. Enablers are captured in Backlogs as a type of Epic, Capability, Feature, or Story. They are used primarily for exploration, architecture implementation, refactoring, building infrastructure, and addressing compliance. While their type is unique, they are managed similarly to customer-facing Backlog items. Details Enablers bring visibility to all the Work necessary to support the efficient development and delivery of future business requirements. Enablers are used to explore ideas, improve architecture, strengthen infrastructure, and manage compliance. Since Enablers result in the production of tangible outputs, they must be visible. They are treated like all other Backlog items—subject to visibility, prioritization, incremental delivery, measurement, and feedback.
Enterprise Knowledge Management Implementation	The process of designing, deploying, and maintaining systems, strategies, and processes that enable an organization to capture, store, share, and utilize knowledge effectively. This includes integrating technology, workflows, and best practices to improve decision-making, collaboration, and innovation across the enterprise.
Epic	In an Agile environment, an Epic is a large body of work that can be broken down into smaller tasks called User Stories. It represents a significant business goal or feature that is too big to be completed in a single iteration or sprint.
ESDC Officer	Any officer role at ESDC (e.g. Contact centre officer, processing officer, etc.)
Feature	In an Agile environment, a Feature is a service or functionality that delivers value to the user or customer. It is more granular than an Epic, but typically larger than a User Story.
Feature Breakdown Structure	A Feature Breakdown Structure is a hierarchical diagram that outlines all the individual features of a product or project breaking them down into their component parts which can be sub-features, tasks or activities required to fully deliver a feature
Global Design	A globally designed site that is usable and convenient for any user around the globe irrespective of cultural design difference.
Information and Communications Technology (ICT)	Information and Communications Technology (ICT) includes hardware, software, voice communication, video capabilities, and digital content (including web and non-web-based information).
Infrastructure Readiness	The ability of infrastructure to meet operational requirements.

Interoperability	The ability of systems, processes, and interfaces to Work together seamlessly, enabling efficient and standardized communication between BDM and existing internal and external systems, without any disruption to the established data exchanges. It involves the creation and maintenance of an enterprise common information model, adherence to industry standards, and the design and approval of architectural patterns for various types of system-to-system exchanges. Interoperability ensures that data formats, communication protocols, and transformation processes are consistent and compatible, allowing for uninterrupted and reliable information exchange while also adhering to the governance and compliance guidelines set by the Treasury Board of Canada. The ESDC Interoperability Team plays a central role in achieving this by providing a standardized and well-documented framework for effective communication between internal/external systems and BDM.
Iteration	A standard, fixed duration timebox during which Agile Teams and ARTs individually and collectively deliver incremental customer value while working toward the PI objectives
Legacy Systems	Current state technology that will be transformed or impacted as part of Common Benefit Delivery (CBD).
Policy Agility	Ability to incorporate policy goals as part of the overall transformation. This will include but is not exclusive to EI Simplification, Integrity by Design, and existing and new policy directives relating to digital and service delivery, privacy, and security.
Project Management Plan (PMP)	A document that defines how the project is executed, monitored, and controlled. It identifies the project management processes and methodologies to carry out the Work.
Process Inventories	A complete set of tangible resources which are to be possessed by an organization for successful accomplishment a business process. Process Inventory is a term mainly referred to the tools, materials and equipment involved into a process.
Processing Officer	An officer responsible for processing ESDC Client benefits (EI, CPP/OAS, Dental
Product Teams	An Agile Team is a cross-functional group of typically ten or fewer individuals with all the skills necessary to define, build, test, and deliver value to their customer.) Agile Teams may be technical teams focused on building digitally enabled solutions, business teams delivering business functions, or, increasingly, elements of both. By quickly delivering Work in small increments, all Agile Teams strive for fast learning, gaining fast customer feedback, assessing the results, and adjusting accordingly.
Quality	Refers to using appropriate material and workmanship and meets all the requirements and specifications of the Contract.

RASCI	**Responsible** The responsible person is the one who does the Work to complete the task or create the deliverable' **Accountable** The accountable person in the RASCI equation delegates and reviews the Work involved in a project' **Support** Individuals or groups who provide resources or help to complete the task. **Consulted** Consulted people provide input and feedback on the Work being done in a project.' **Informed** 'Informed people need to be looped into the progress of a project but not consulted or overwhelmed with the details of every task'
RAID	Risks, Actions, Issues and Decisions Management
Requirements Traceability Matrix (RTM)	A requirements traceability matrix (RTM) is a document that maps and tracks the relationships between requirements and other project artifacts, such as design documents, test cases, and even issues. It ensures that all requirements are accounted for and implemented throughout the project lifecycle. Essentially, it's a table that links requirements to their corresponding deliverables and verification activities.
Run	Refers to ongoing break/fix, planned maintenance and enhancements for the Common Benefit Delivery (CBD) Platform.
User Acceptance Testing	User Acceptance Testing is the final phase of software development where real users test the software to ensure it meets their needs and is ready for release. It focuses on validating that the software functions correctly, is user-friendly, and fulfills the specified business requirements. UAT is a crucial step in the software development lifecycle, ensuring the product aligns with user expectations and business objectives before deployment.
User story estimation	Refers to a collaborative estimation technique used by Agile teams—especially in Scrum—to estimate the effort or complexity of User Stories or tasks in a product backlog. Typically includes the development team, product owner, and Scrum Master. Each participant uses a deck of cards with numbers (often Fibonacci sequence: 1, 2, 3, 5, 8, 13, etc.) or a digital tool. The product owner presents a user story or task to the team. The team discusses the story to clarify requirements and assumptions. Each team member privately selects a card representing their estimate. All cards are revealed simultaneously. If estimates vary widely, the team

	discusses the reasons. The process is repeated until a consensus is reached.
SABA	SABA Learning Management System (LMS), ESDC's learning system of record
Scrum	Scrum is an agile framework that helps teams manage work in an iterative and incremental way, emphasizing collaboration, adaptability, and continuous improvement. It involves short development cycles called sprints and utilizes specific roles, events, and artifacts to deliver working product increments.
SDLC	Software Development Life Cycle includes the following delivery stages: planning, analysis, design, implementation, testing, deployment, stabilization.
Showcase	Demonstration of Work Outputs.
SMART Objective	Per Canada.ca a SMART Objective is: **S**pecific - It describes a specific action, behaviour outcome, or achievement that is observable. **M**easurable - It is quantifiable and has indicators associated with it so it can be measured. **A**udience-specific - It is appropriate and relevant to your target audience. **R**ealistic - It is achievable with the available resources. **T**ime-Bound - It states the time within which the objective will be achieved.
Solution Backlog	A Kanban system that is used to capture and manage the capabilities and Enablers intended to enhance the large solution and extend its architectural runway. The ART and Solution Backlogs capture the Solution's upcoming Features, Capabilities, and Non-functional Requirements (NFRs). These Backlogs are visualized and managed in Kanban systems, where features, capabilities, and Enablers are captured, defined, evolved, and prioritized to ensure a continuous flow of value to Customers.
KM Taxonomy	The process by which a comprehensive review of language across all future state CPP, OAS and EI on BDM streams to ensure consistency of terminology in systems, training modules, procedures, correspondence, and other engagement material, and to guarantee the compliance with legal and policy requirements and the alignment with Canadian English and French language standards. Identical concepts in both CPP, OAS and EI programs share consistent terminology.

	The KM Taxonomy must be aligned to business process and day-to-day operations.
Third Party	External stakeholders impacted by Common Benefit Delivery
User Story	A User Story is used to document and define the functional requirements for a small unit of Work that when combined with other User Stories makes up a Feature. A User Story is used by development teams to define specific tasks to design and build the functionality required.
Value Point	For the purposes of this Task Authorization (TA), a Value Point is defined as a unit of measure equivalent to two (2) hours of pre-testing development, configuration, or a combination of both. This framework will enable us to estimate the number of Value Points per story accurately.
Virtual Agent	A virtual Agent (chatbot).
Work	Activities, tasks, Work products, or anything that is required by the Contractors in the execution of the TA.
Work items	Work items is defined as all the activities, services goods, equipment, and things required to be done, delivered, or performed by the Contractor to carry out the Work.
Work Package	Refers to a defined set of related tasks, deliverables, and outcomes grouped together within a larger project. Work packages are used to structure and manage scope, responsibility, and timelines during project execution.
Work Team	A cross-functional group of 10 or fewer individuals who iteratively define, build, test, and deliver value.

Appendix B – KM Tool Business Requirements

Please refer to the document in the TA package

Appendix C – Agile Procurement with Value Points

Please refer to the document in the TA package

Appendix D – ICT Accessibility Requirements

Please refer to the document in the TA package

Appendix E – Has been intentionally removed

Appendix F – KM Deliverables

Please refer to the document in the TA package

Appendix G – Resource Categories and Responsibilities

Please refer to the document in the TA package

Appendix H – Proposed Delivery Approach and Governance Model

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Appendix I – User Story template

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Appendix J – Technical Details of Individual KM tools

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Appendix K - SharePoint Addons

Please refer to the document in the TA package

Appendix L - ESDC Approved Tools

Please refer to the document in the TA package

Appendix M – Proposed Architecture with Integration Points

Please refer to the document in the TA package

Appendix N – Proposed Migration Roadmap

Please refer to the document in the TA package

Appendix O – Has been intentionally removed

Appendix P - Stakeholder Engagement Communication Standards

Please refer to the document in the TA package

Appendix Q – BDM Change Management Strategy

Please refer to the document in the TA package

Appendix R – Change Management Process

Please refer to the document in the TA package

Appendix S - BDM ARC - BDM Architecture Principles Update - November 2020

Please refer to the document in the TA package

Appendix T – AssistMe Background Information

Please refer to the document in the TA package