Appendix F Knowledge Management (KM) Deliverables

1) The Contractor must provide drafts of the Deliverables to Canada, as required, to enable spot checks and the ability to provide input on the direction of the Deliverables, leading up to the Deliverables being accepted.
2) Canada will provide the Contractor with either written feedback on the Deliverables or provide a written statement which identifies in reasonable detail, with references to the applicable specifications, all the deficiencies preventing approval.
3) The Deliverables will be deemed accepted according to Section 6.7 of the Statement of Work (SOW).
4) The Deliverables will be assessed in accordance with the table below.
5) The Contractor must complete all activities and deliverables associated to each Work Package as outlined in Annex A Statement of Work and this Appendix.

Definitions:
Release 1 / MVP: Release 1 will include implementing all the business requirements in addition to resolving defects and bug fixes.
Acceptance Criteria: Please refer to Section 6 of the Statement of Work (SOW) for further information on the acceptance criteria.

Work Package	Payment Approach	List of Deliverables
WP-01: Business Readiness and Design	Milestone Based	WP-01.01: Draft Requirements Traceability Matrix
		WP-01.02: User Stories Creation (KM Solution, AI Enablement and Data Migration)
		WP-01.03: KM Solution Migration Strategy and Roadmap
		WP-01.04: KM Operational Model
		WP-01.05: KM Frameworks and Processes
		WP-01.06: Design Specifications
		WP-01.07: UI Design
		WP-01.08: Detailed Functional Design Specifications
		WP-01.09: Detailed Technical Design Specifications
		WP-01.10: Architecture and Environment
		WP-01.11: Solution Architecture
		WP-01.12: KM Information Architecture
		WP-01.13: Extended Data Catalogue
		WP-01.14: AI Technology Capabilities Analysis
WP-02: Development and AI Enablement	Fixed Value Point	WP-02.01: KM Solution Development
		WP-02.02: AI Enablement
WP-03: Data Migration and Consolidation	Milestone Based	WP-03.01: Content Inventory and Analysis Report
		WP-03.02: Strategy and Approach
		WP-03.03: Content Consolidation and Migration
WP-04: Change Management	Fixed Price	WP-04.01: Change Impact Assessment (CIA)
		WP-04.02: Stakeholder Identification and Analysis (SIA)
		WP-04.03: Change Management Strategy and Plans
		WP-04.04: Training Needs Assessment (TNA)

Work Package	Payment Approach	List of Deliverables
		WP-04.05: Training Plan
		WP-04.06: Training Materials (End User)
		WP-04.07: Train the Trainer (TTT) Materials
		WP-04.08: Change Readiness Report
WP-05: Release Management and Transition Out	Fixed Price	WP-05.01: Release Plan and Scheduling
		WP-05.02: Release Inventory and Checklist Validation
		WP-05.03: Technical Systems Documentation
		WP-05.04: Release Management for Release 1 (MVP) and other subsequent releases
		WP-05.05: Implementation Decision Document/Report (IDD/IDR)
		WP-05.06: Post-Release Monitoring Support
		WP-05.07: Post-Release Lessons Learned
		WP-05.08: Rollback Procedures
		WP-05.09: Knowledge Transfer Strategy, Approach and Plan
		WP-05.10: Knowledge Transfer Complete Report
		WP-05.11: ConOps
		WP-05.12: Transition Out Plan and Report
		WP-05.13: Post –Cutover Checklist
		WP-05.14: Post-Deployment Stabilization per Release.
WP-06: Project Management and Governance	Fixed Price	WP-06.01: Project Management Artifacts and Approach
		WP-06.02: Project Management Plan (PMP)
		WP-06.03: Deliverable Review Matrix
		WP-06.04: KM Initiative Schedule
		WP-06.05: Executive Showcases
		WP-06.06: Sprint Showcases
		WP-06.07: Executive Summary Reports
		WP-06.08: Sprint Reports
		WP-06.09: **Weekly Status Report Summaries**
		WP-06.10: Ongoing Project Management Activities
		WP-06.11: Governance Model and Delivery Approaches
		WP-06.12: Deployment Strategy and Roadmap
		WP-06.13: Environment Management Strategy and Plan
		WP-06.14: Code Promotion Strategy and Management
		WP-06.15: Operational Security Procedures
		WP-06.16: System Security Strategy

WP-01: Business Readiness and Design

Milestones for WP-01	Deliverables
Milestone 1: Submission of Draft Requirements Traceability Matrix and KM Operational Model	• WP-01.03 KM Solution Migration Strategy and Roadmap • WP-01.01 Draft Requirements Traceability Matrix • WP-01.04 KM Operational Model
Milestone 2: Development of KM Frameworks, Processes and Design Specifications	• WP-01.05 KM Frameworks and Processes • WP-01.06 Design Specifications
Milestone 3: Completion of Information Architecture and Extended Data Catalogue	• WP-01.12 Information Architecture • WP-01.13 Extended Data Catalogue • WP-01.14 AI Technology Capabilities Analysis
Milestone 4: Finalization of Blueprint, UI Design, and Detailed Specifications	• WP-01.02 User Stories Creation (KM Solution, AI Enablement and Data Migration) • WP-01.07 UI Design • WP-01.08 Detailed Functional Design Specifications • WP-01.09 Detailed Technical Design Specifications

The Contractor must deliver the following:

ID	Name	Description
WP-01.01	Draft Requirements Traceability Matrix	The Contractor must develop a comprehensive Draft Requirements Traceability Matrix (RTM) to ensure that all Epics, Features, and User Stories listed in Azure DevOps (ADO) are traceable to the business requirements outlined in *Appendix B* for the new Knowledge Management (KM) tool.

ID	Name	Description

		The Contractor must ensure that the Draft Requirements Traceability Matrix is always up to date, as laid-out in Ongoing Project Management Activities, WP-06.01.
		
		The RTM must be delivered via an ADO Dashboard and accompanied by a supporting document that outlines the traceability framework.
		Key Content Requirements
		The RTM must include the following elements:
		• A framework detailing the proposed hierarchy and foundation for traceability and dependencies across Epics, Features, and User Stories.
		• Explicit linkage of Epics, Features, and User Stories to the corresponding functional requirements and capabilities.
		• A dashboard in ADO that visually maps:
		  ○ User Stories to Features; and
		  ○ Features to Epics.
		• Query capabilities within ADO to:
		  ○ View all User Stories;
		  ○ Filter User Stories by Feature; and
		  ○ Identify orphan User Stories not linked to any Feature or Epic.
		• A clear and auditable pathway from business requirements to test cases, including references to User Stories, source code, and test artefacts.
		• Mechanisms to ensure the RTM remains current and reflects ongoing updates throughout the project lifecycle.
		Compliance and Standards
		• The RTM must comply with all applicable Government of Canada standards for traceability and documentation.
		• The ADO Dashboard must be configured to support Protected B data requirements.
		• The Contractor must ensure interoperability with existing IITB KM Operations tooling and workflows.

WP-01.02	User Stories Creation (KM Solution, AI Enablement and Data Migration)	The Contractor must develop comprehensive User Story Maps for the KM Solution, AI Enablement, and Data Migration. These maps must be organised by user activities, derived from business requirements, and prioritised into a development backlog. The mapping must transpose all existing requirements and processes into a standardised Epic / Feature / User Story structure. **Key Content Requirements** Each User Story Map must include the following elements: • High-level tasks and objectives aligned with business goals. • Detailed user tasks and process steps. • Identification of inter dependencies (internal and external). • Prioritisation of requirements based on business value, dependencies, and delivery timelines for various releases.

ID	Name	Description
		• Identification of Minimum Viable Product (MVP) scope and other releases. • Defined user personas to contextualise functionality and user needs. The Contractor must create Epics, Features, and User Stories in ADO for: • All requirements provided by Canada regarding the KM Solution. • Any new requirements identified by the Contractor. • New functions related to AI Enablement and Data Migration. This includes: • Prioritising User Stories based on business impact, dependencies, and readiness. • Reviewing and securing approval from Canada for all User Story Maps, with documented rationale for any changes. **ADO Configuration and Standards** When entering User Stories in ADO, the Contractor must: • Use the template provided by Canada. • Review each User Story with Canada to ensure alignment with business requirements. • Include, at minimum, the following elements: ○ A succinct title describing the user-functional process ○ Description of the functionality ○ Actors involved ○ Preconditions ○ Acceptance Criteria ○ Complexity rating ○ Assumptions ○ Dependencies and relationships ○ Data references (elements required for the User Story) ○ Reference documents (if applicable) All decisions or changes discussed must be documented under the **Acceptance Criteria** section of the User Story in ADO. Decisions must not be recorded solely in the **Discussion** section. The Contractor must continuously refine and maintain the User Stories and backlog to ensure they remain current in both content and status. **Compliance and Standards** • All User Story Maps and backlog items must comply with applicable Government of Canada standards. • ADO configurations must support Protected B data requirements. • The Contractor must ensure interoperability with IITB KM Operations and existing development workflows.
WP-01-03	KM Solution Migration Strategy and Roadmap	The Contractor must define and document a comprehensive migration strategy for transitioning from existing KM tools to the new solution. This includes the MVP approach, implementation timelines, delivery methodology, and a detailed analysis of AI enablement opportunities. The strategy must support seamless integration with ongoing operations and ensure readiness for Day 2 support. **Key Content Requirements**

ID	Name	Description
		The Migration Strategy must include the following elements: • A clearly defined migration strategy for all KM tools within the scope of this initiative. • High-level implementation timelines for each release, aligned with business priorities and dependencies. • A detailed delivery approach and methodology, including sequencing, resource planning, and risk mitigation. • A defined approach for managing concurrent changes in current Production systems, ensuring that updates are incorporated without disruption. • Identification and documentation of dependencies that may impact delivery timelines, resource allocation, or system interoperability. **AI Enablement Annex** As part of the migration strategy, the Contractor must produce a standalone annex document that provides: • A recommended list of AI enablements relevant to the KM solution, including both immediate and future opportunities. • A prioritisation of AI capabilities based on expected business value, feasibility, and alignment with operational goals. • Detailed analysis of each proposed AI function, including use cases, technical considerations, and integration pathways. • Identification of areas where AI can enhance user experience, content management, search, automation, and decision support. • Recommendations for phased implementation of AI features, including MVP candidates and long-term enhancements. **Compliance and Standards** • The migration strategy and AI annex must comply with all applicable Government of Canada standards for system transition, data handling, and operational readiness. • All proposed AI capabilities must meet Protected B requirements and align with IITB KM Operations protocols. • The Contractor must ensure that the strategy supports interoperability with existing systems and platforms, including the Canada Interoperability Platform where applicable.

WP-01.04	KM Operational Model	The Contractor must propose a comprehensive KM Operating Model to ensure ESDC can effectively support its operational staff throughout the transition to the new KM system. This model will define the functional roles, processes, and responsibilities required to operate and maintain the KM solution.
		Key Content Requirements
		The KM Operating Model must include the following elements:
		• A framework for a centralised KM solution, developed in collaboration with Canada, including:
		  ○ An inventory of current functional roles and operational capabilities.
		  ○ A list of future-state roles and requirements, including necessary skills and competencies.
		  ○ Identification and formulation of unique roles not currently represented in the existing functional roles list, using researched job descriptions aligned with current role formats.
		  ○ Defined KM solution staff roles, personas, and responsibilities.

ID	Name	Description
		○ A rationale for each new role, explaining how it supports the KM strategy and Benefits Delivery Modernization (BDM) objectives. ○ Detailed tasks and responsibilities for each role, including their functions and interactions. ○ Validation of new roles with ESDC and updates as required. ○ Mapping of existing team roles to future KM roles. ○ A list of roles that must be filled to support the KM Operating Model. ○ A lifecycle map detailing the tasks and responsibilities of each role, their functions, and interactions. ○ Identification of gaps between current and future roles. ○ Identification of tasks currently performed and any gaps in process or ownership in the future state. ○ Consultation with HR resources to validate processes and update documentation as needed. **Compliance and Standards** • The KM Operating Model must comply with all applicable Government of Canada standards for workforce planning, operational readiness, and system governance. • All role definitions and processes must support Protected B requirements and align with IITB KM Operations protocols. • The Contractor must ensure interoperability with existing systems and platforms, including the Canada Interoperability Platform where applicable.
WP-01.05	KM Frameworks and Processes	The Contractor must define and develop a comprehensive KM Content Framework, including associated processes and the full information management lifecycle. This deliverable ensures that KM operations are structured, sustainable, and aligned with business requirements and industry best practices. The framework must support the transition to the new KM solution and enable IITB KM Operations to maintain and evolve the system effectively from Day 2 onward. **Key Content Requirements** The KM Content Framework must include the following elements: • Operational KM Processes and Procedures: Clearly defined processes for managing KM content and supporting operational workflows. • Content Management and Lifecycle Documentation: Documented processes for content creation, review, approval, publishing, archiving, and disposal. • Content Migration and Consolidation Framework: Defined approach for migrating and consolidating content from legacy KM tools into the new solution. • Design, Testing, and Deployment Framework: Structured processes for managing content-related activities across design, testing, and deployment phases. • AI Adoption Strategy for KM Operations: Strategy and processes for integrating AI capabilities into KM operations, including content automation, intelligent search, and co-authoring support. • Alignment with Industry Best Practices: Reference to recognised KM standards and operational frameworks to ensure quality and consistency.

ID	Name	Description
		• Current State Assessment and Gap Identification: Identification of gaps in current KM processes and capabilities, and documentation of current state processes across KM tools and teams. • Knowledge Base Update Notification Process: Defined process for notifying stakeholders of updates to KM content. • Retention Strategy: Formal strategy for content retention, aligned with Government of Canada policies. • Performance Measurement Framework: Metrics and indicators to assess the effectiveness and efficiency of KM operations. • Governance Model: Clearly assigned roles and responsibilities for KM content ownership, maintenance, and oversight. • Foundational Elements Review: Clarification and validation of foundational KM components and assumptions. • Content Lifecycle and Development Process: Defined lifecycle stages and subprocesses for content development and maintenance. • Additional Process Identification: Documentation of any additional processes required to support KM operations and ensure completeness. **Compliance and Standards** • The KM Content Framework must comply with all applicable Government of Canada standards for information management, governance, and operational readiness. • All components must support Protected B requirements and align with IITB KM Operations protocols. • The Contractor must ensure interoperability with existing systems and platforms, including the Canada Interoperability Platform where applicable. • The framework must adhere to security, interoperability, and accessibility standards.
WP-01.06	Design Specifications	The Contractor must produce comprehensive functional and technical documentation detailing the Solution Architecture and its functionality, including AI components. This documentation is critical to ensuring that the technical solution supports KM business operations and aligns with the broader BDM Programme objectives. The Solution Architecture must be described across the following core architectural domains: • Business Architecture • Application Architecture • Information Architecture • Security Architecture • Technology Architecture The architecture documents must reflect the specific context of project delivery and evolve throughout the project lifecycle. It must be updated after each release to accurately represent any changes introduced during implementation. **Key Content Requirements** The Solution Architecture documentation must include the following elements: • Defined conceptual, logical, and physical architecture, including core solution components and their usage within the KM solution.

ID	Name	Description
		• Detailed interactions across the solution, including process flows and information flows. • Fit-gap analysis identifying missing components and proposed design solutions. • Defined and developed workflows that support KM operations and business processes. • Alignment of design specifications to all identified capabilities and requirements. • Design considerations for future scalability and enhancements to support long-term sustainability. • All diagrams and artefacts must be created and maintained in a tool approved by ESDC. **Compliance and Standards** • The architecture must comply with all applicable Government of Canada design standards. • All components must support Protected B requirements and align with IITB KM Operations protocols. • The Contractor must ensure interoperability with existing systems and platforms, including the Canada Interoperability Platform where applicable. • The documentation must adhere to security, interoperability, and accessibility standards.

WP-01.07	UI Design	The Contractor must produce the architecture and design specifications for the User Interface (UI) of the KM solution. This deliverable ensures that the UI supports user interaction requirements, aligns with Government of Canada standards, and enables seamless integration with operational systems and user profiles.
		Key Content Requirements
		The UI Design must include the following elements:
		• Defined information architecture to support intuitive and efficient user interaction.
		• Implementation of all non-functional requirements for the UI, including:
		  ○ Accessibility: Compliance with Government of Canada accessibility standards.
		  ○ Performance: Optimised responsiveness and load times.
		  ○ Security: Alignment with Protected B requirements and secure user access protocols.
		• Conformance to ESDC's common look and feel standards.
		• Implementation of requirements under the Government of Canada Official Languages Act and related policies.
		• Provision of all necessary artefacts to support translation activities. ESDC will lead the translation process.
		• Implementation of single sign-on (SSO) capability for users, aligned with Active Directory profiles.
		• Delivery of a customised UI experience based on user profiles:
		  ○ Profiles must be derived from Virtual Service Groups (VSG) implemented under EI WLM/WFM (Workload Management / Workforce Management) activities.
		  ○ If VSG is not implemented, the Contractor must create custom user profiles within the solution.
		User Interaction Artefacts
		The Contractor must define, detail, and document the following artefacts to support user interactions:
		• Site navigation structures.
		• User flows and interaction pathways.
		• Site maps and content hierarchies.
		• Metadata usage to support search, filtering, and content organisation.

ID	Name	Description
		Compliance and Standards • The UI Design must comply with all applicable Government of Canada standards for accessibility, security, and bilingual service delivery. • All components must support Protected B requirements and align with IITB KM Operations protocols. • The Contractor must ensure interoperability with existing systems and platforms, including the Canada Interoperability Platform where applicable.

WP-01.08	Detailed Functional Design Specifications	The Contractor must produce detailed Functional Design Documents (FDDs) at the feature or interface level. These documents are essential to ensure that the technical solution fully supports the business requirements and enables a seamless transition to IITB KM Operations.
		Each FDD and Technical Design Document (TDD) must clearly demonstrate how the design addresses the business requirements. The mapping of the FDDs and TDDs to either the Epic or Feature, will be agreed upon with ESDC. All artifacts will be saved in ADO in the appropriate format.
		Key Content Requirements
		Each FDD must include the following elements:
		• Delivered for every feature or interface identified in the scope of work.
		• Specifications that support operational readiness for IITB KM Operations on Day 2.
		• Conceptual and detailed designs for the information architecture.
		• Configuration and customisation details, including:
		  ○ Diagrams depicting connectivity, data flows, data definitions, and data handling.
		  ○ Implications and guidance for upgrading to future system versions.
		• Identification of key KM functional components and other relevant components (e.g., interfaces), including:
		  ○ Overview of component interactions.
		  ○ Screen prototypes.
		• High-level definitions of APIs or other integration points required for system interoperability.
		  ○ While no integrations are currently in scope, the design must accommodate future integration requirements.
		• Documentation of application configuration settings necessary to meet scope requirements.
		• Mapping of user stories and functional requirements to each feature, demonstrating traceability and coverage.
		• Compliance with all applicable Government of Canada design standards.
		• Use of the Canada Interoperability Platform for all interfaces, unless otherwise agreed.
		• Adherence to security, interoperability, and accessibility standards.
		• Compliance with all applicable configuration and development standards set by Canada.
		Compliance and Standards
		• All FDDs must meet Protected B requirements and align with IITB KM Operations protocols.
		• The Contractor must ensure that all design specifications support interoperability with existing systems and platforms.

ID	Name	Description

WP-01.09	Detailed Technical Design Specifications	The Contractor must produce comprehensive Technical Design Documents (TDDs) at the feature or interface level (IDD – Interface Design Document). These documents are critical to ensuring that the technical solution is well-defined, supports business requirements, and enables seamless transition to IITB KM Operations.
		The TDD must be associated with a or multiple Functional Design Documents (FDD) and describe *how* the technical solution meets the business requirements outlined in the FDD.
		Each TDD must be delivered for every feature or interface identified.
		Interface Design Requirements
		• The Interface Design Document must identify all business-critical integration points.
		• Each integration point must include:
		  ○ A summary of the interface and its business function.
		  ○ Examples, where applicable.
		  ○ Logical process flows illustrated clearly.
		Key Content Requirements
		Each TDD must include the following elements:
		• Specifications that support transition to IITB KM Operations and enable Day 2 operational readiness.
		• Conceptual and detailed designs for the information architecture.
		• Configuration and customisation details, including:
		  ○ Diagrams showing connectivity, data flows, data definitions, and handling.
		  ○ Implications and guidance for upgrading to future system versions.
		• Identification of key KM functional components and other relevant components (e.g., interfaces), including:
		  ○ Overview of component interactions.
		  ○ Screen prototypes.
		• High-level definitions of APIs or other integration points required for system interoperability.
		• Documentation of application configuration settings necessary to meet scope requirements.
		• Compliance with all applicable Government of Canada design standards.
		• Use of the Canada Interoperability Platform for all interfaces, unless otherwise agreed.
		• Adherence to security, interoperability, and accessibility standards.

WP-01.10	Architecture and Environment	The Contractor must develop a comprehensive document detailing the architectural and environmental aspects of the KM solution. This deliverable is intended to support future scalability, operational readiness, and alignment with ESDC standards. **Purpose and Scope** This document must define the foundational elements of the KM solution, including its components, environments, and communication protocols. It should serve as a blueprint for the future state and support informed decision-making across the solution lifecycle. **Key Content Requirements** The document must include the following elements: • Future State Blueprint: A clear definition of the future state KM solution architecture, aligned with ESDC standards. Refer to *Appendix S* for guidance.

ID	Name	Description
		• Environment Lifecycle Definition: Identification and description of all environments involved in the software solution lifecycle (e.g., development, testing, staging, production), including the processes for promoting and transitioning between environments. • Data Flow Mapping: Detailed mapping of data flows between internal and external systems, highlighting dependencies and integration points. • Communication Protocols: Even if no interfaces are included in the current KM solution scope, the document must define potential communication protocols to support future scalability and integration readiness. • Future Integration Considerations: Reference *Appendix M* for information on potential future application interfaces that may influence protocol and component design.

WP-01.11	Solution Architecture	The Contractor must create and maintain a current Solution Architecture document that aligns with *Annex M – Proposed Architecture with Integration Points*. This document is essential to ensure that the technical solution supports KM business operations across all releases and reflects the full scope of the BDM Programme.
		The Solution Architecture must evolve throughout the project lifecycle and be updated after each release to accurately reflect any changes introduced during implementation.
		Key Content Requirements
		The Solution Architecture must include the following elements:
		• A clearly defined Conceptual Design for the KM solution.
		• Holistic identification of key project functional components and other relevant components (e.g. interfaces), with an overview of how they interact across the full scope of the project, including End-to-End Business Architecture for all releases.
		• A comprehensive architecture diagram that will serve as the anchor for all other design artefacts developed throughout the design phase. The diagram must be created in a tool accessible to ESDC and illustrate the following:
		  ○ Key functional components.
		  ○ Supporting components.
		  ○ Interactions and integration points.
		• Definition of each functional role within the solution and its impact or influence on other functions across all functional areas.
		• Demonstration of alignment between functions and processes, clearly describing functional coverage and operational flow.
		Compliance and Standards
		• The Solution Architecture must comply with all applicable Government of Canada design standards.
		• All components must support Protected B requirements and align with IITB KM Operations protocols.
		• The Contractor must ensure interoperability with existing systems and platforms, including the Canada Interoperability Platform where applicable.
		• The architecture must adhere to security, interoperability, and accessibility standards.

ID	Name	Description

WP-01.12	KM Information Architecture	The Contractor must produce comprehensive documentation detailing the Information Architecture and its functionality. This deliverable ensures that the KM solution leverages industry best practices and standards to support business knowledge and operations across the ESDC.
		The Information Architecture must reflect both current and future states and evolve throughout the project lifecycle. The initial approved version will be tracked as part of this work package, and subsequent updates will be managed through the Project Management work package following each release.
		Key Content Requirements
		The Information Architecture documentation must include the following elements:
		• A comprehensive analysis and documentation of the current state content inventory.
		• A defined and detailed information architecture for the future state of content and knowledge articles.
		• Detailed specifications for content structure and management, including but not limited to:
		  ○ Document types
		  ○ Data types
		  ○ Content objects
		  ○ Existing information structures
		  ○ Metadata
		  ○ Taxonomy
		• Architecture definitions specific to project delivery within the scope of the BDM Programme.
		• All diagrams and artefacts must be created and maintained in a tool approved by ESDC.
		Compliance and Standards
		• The Information Architecture must comply with all applicable Government of Canada standards for content management, metadata, and taxonomy.
		• All components must support Protected B requirements and align with IITB KM Operations protocols.
		• The Contractor must ensure interoperability with existing systems and platforms, including the Canada Interoperability Platform where applicable.
		• The documentation must adhere to security, interoperability, and accessibility standards.

WP-01.13	Extended Data Catalogue	The Contractor must create and maintain a comprehensive and up-to-date Data and KM Article Catalogue to support operational visibility, traceability, and content governance throughout the KM solution lifecycle. This catalogue must be delivered in the form of a spreadsheet and updated weekly to reflect the evolving data and knowledge base.
		Key Content Requirements
		The catalogue must include the following elements:
		• Catalogue Overview and Interpretation Instructions: A clearly written introduction explaining the purpose of the catalogue, how to interpret its contents, and how it supports KM operations and reporting.
		• Data and KM Article Metadata: For each entry, the catalogue must include:
		  ○ Data type (e.g., structured, unstructured, transactional, reference).
		  ○ Size information (e.g., file size, record count, storage footprint).
		  ○ Description of fields (e.g., field name, data type, purpose, source system).
		  ○ Document types (e.g., policy, procedure, guidance, FAQ).

ID	Name	Description
		○ Content objects and their relationships (e.g., parent-child, linked articles). ○ Existing information structures (e.g., folders, repositories, tagging schemes). ○ Metadata attributes (e.g., author, creation date, last modified, version). ○ Taxonomy classification (e.g., category, subcategory, topic tags). • Traceability and Governance ○ Identification of source systems and ownership. ○ Status indicators (e.g., draft, approved, archived). ○ Linkage to business processes or functional areas. ○ Notes on data sensitivity and classification (e.g., Protected A/B). • Modernization Review ○ Flag content where the process described is excessive due to limitations in system design and where automation or a stronger UI could replace the process, removing the need for an article • Maintenance and Versioning ○ Weekly update log with timestamps and summary of changes. ○ Version control to track historical changes and ensure auditability. **Compliance and Standards** • The catalogue must comply with all applicable Government of Canada standards for data management, content governance, and operational reporting. • All entries must support Protected B requirements and align with IITB KM Operations protocols. • The spreadsheet must be maintained in a format approved by ESDC and accessible to designated stakeholders.
WP-01.14	AI Technology Capabilities Analysis	The Contractor must produce a comprehensive **AI Technology Capabilities Analysis** to assess, document, and guide the integration of AI functionalities within the KM solution. This deliverable ensures that AI technologies are aligned with business objectives, operational needs, and industry best practices, while supporting innovation and compliance across ESDC. The analysis must reflect both current and future state capabilities and evolve throughout the project lifecycle. The initial approved version will be tracked as part of this work package, and subsequent updates will be managed through the Project Management work package following each release. **Key Content Requirements** The AI Technology Capabilities Analysis documentation must include the following elements: • A comprehensive analysis and documentation of the current state AI tools and services available within ESDC, including their deployment, integration, and use in KM-related functions. • A defined and detailed analysis of the future state, outlining how existing AI technologies available with ESDC can be further leveraged or optimized to enhance AI-enabled capabilities within the centralised KM solution. • Detailed specifications for AI Capabilities, including but not limited to enhancing content discovery, collaboration, and operational efficiency, while supporting both functional and non-functional requirements as outlined in Appendix B. ○ Capability name and functional category

ID	Name	Description
		○ Existing tool or platform used ○ Integration method ○ Supported data types (e.g., structured, unstructured) ○ Content types affected (e.g., documents, metadata, articles) ○ Metadata and taxonomy alignment ○ Security classification support (e.g., Protected B compliance) ○ Operational benefits and performance indicators • Architecture definitions specific to project delivery within the scope of the BDM Programme, including interoperability with Microsoft 365 and other approved platforms. • All diagrams and artefacts must be created and maintained in a tool approved by ESDC, such as Microsoft Visio, or equivalent. **Compliance and Standards** The AI Technology Capabilities Analysis must comply with all applicable Government of Canada standards for AI, data governance, content management, metadata, and taxonomy. All components must support Protected B requirements and align with IITB KM Operations protocols. The Contractor must ensure interoperability with existing systems and platforms, including the Canada Interoperability Platform where applicable. The documentation must adhere to security, interoperability, and accessibility standards.

WP-02: Development and AI Enablement
The Contractor must deliver the following:

ID	Name	Description
WP-02.01	KM Solution Development	The Contractor must complete all development activities required to deliver the KM solution, including both functional and non-functional requirements as detailed in *Appendix B*. This work encompasses the configuration of SharePoint and its associated add-ons, as well as any custom development necessary to implement the Epics, Features, and User Stories previously created and approved in ADO. **Key Content Requirements** KM Solution Development must include the following elements: • Full implementation of all functional and non-functional requirements, including accessibility, performance, and security considerations. • Configuration of SharePoint and its add-ons to meet business and technical requirements. • Development of solution components to deliver all Epics, Features, and User Stories documented in ADO. • Execution of all testing activities required by individual User Stories, including:

ID	Name	Description
		○ Unit testing ○ Integration testing ○ User Acceptance Testing (UAT) ○ Regression testing • Execution of all testing activates required for a release, including: ○ Regression testing ○ Performance testing ○ Security testing ○ Accessibility testing • Resolution of bugs and defects identified during development and testing phases. • Testing and bug fixes related to each release of the KM solution, ensuring stability and readiness for deployment. • Documentation of development activities, including traceability to requirements and test results. • **UX and UI design as needed** **Documentation** • Development Documentation: Maintain traceable records of all development activities and design decisions. • Testing Documentation: Document test cases, results, and defect logs. • User Guides: Provide end-user documentation for AI features. **Compliance and Standards** • All development work must comply with applicable Government of Canada standards for software development, configuration, and deployment. • The solution must meet Protected B requirements and align with IITB KM Operations protocols. • The Contractor must ensure interoperability with existing systems and platforms, including the Canada Interoperability Platform where applicable. • Development must adhere to security, interoperability, and accessibility standards.
WP-02.02	AI Enablement	The Contractor must develop and implement AI-enabled capabilities within the centralised KM solution. These capabilities are intended to enhance content discovery, collaboration, and operational efficiency, while supporting both functional and non-functional requirements as outlined in *Appendix B*. The AI functionalities must be fully integrated into the SharePoint environment and designed to meet Protected B requirements, ensuring alignment with IITB KM Operations protocols. **Key Content Requirements** The AI-enabled development must include the following elements: **Functional Requirements** • Development of solution components to deliver all Epics, Features, and User Stories documented in ADO related to AI capabilities. • AI Search Functionality: Implement natural language processing (NLP)-powered semantic search across KM content, develop advanced filtering options based on metadata and content types, and

ID	Name	Description
		support synonyms, stemming, and concept-based search to improve relevance. Leverage the current implementation of AssistMe. • AI Co-Authoring Tool: Provide real-time suggestions for grammar, style, and content enhancements, and incorporate context-aware recommendations aligned with existing documents and knowledge base articles. • User Interaction and Interface: Design intuitive user interfaces for AI search and co-authoring tools within SharePoint and ensure compliance with WCAG 2.1AA accessibility standards. **Non-Functional Requirements** • Performance: Maintain response times consistent with SharePoint performance standards, including during peak usage. • Security: Implement encryption protocols for sensitive data and enforce role-based access controls for AI feature usage. • Scalability: Design AI components to scale with increasing content volume and user base. • Accessibility: Design AI components to conform to ESDC's Accessibility standards user base. **Configuration and Development** • Development of solution components to deliver all Epics, Features, and User Stories documented in ADO related to AI capabilities. • Leverage ESDC standardize solutions EVA and Microsoft co-pilot when possible, enhancing, extending, and configuring these solutions as needed to meet the requirements. • SharePoint Configuration: Configure SharePoint and relevant add-ons to support AI capabilities and set up Managed Metadata and Search Schema for enhanced AI search. • Custom Development: Develop custom algorithms where off-the-shelf solutions are insufficient and integrate Microsoft Cognitive Services or equivalent AI APIs for NLP capabilities. **Testing Activities** • Unit Testing: Validate individual AI components for logic and performance. • Integration Testing: Ensure seamless interaction between AI components and SharePoint. • User Acceptance Testing (UAT): Conduct UAT sessions to gather feedback on AI search and co-authoring tools. • Regression Testing: Perform regression tests to confirm stability after updates. • Bug Resolution: Identify and resolve defects across all testing phases. • Non function testing including Security, Performance and Accessibility testing. **Documentation** • Development Documentation: Maintain traceable records of all development activities and design decisions. • Testing Documentation: Document test cases, results, and defect logs. • User Guides: Provide end-user documentation for AI features.

ID	Name	Description
		Compliance and Standards • Ensure full compliance with Government of Canada standards for software development, configuration, and deployment. • Meet Protected B requirements and align with IITB KM Operations protocols. • Adhere to recognised standards for security, interoperability, and accessibility. • Ensure compatibility with the Canada Interoperability Platform. **Post-Deployment Activities** • Monitoring and Feedback: Implement tools to monitor AI performance and usage and establish feedback mechanisms for continuous improvement. Continuous Improvement: Plan for ongoing support and enhancement, including retraining AI models with updated datasets.

WP-03: Data Migration and Consolidation

Milestones for WP-03	Deliverables
Milestone 1: Analysis	WP-03.01 Content Inventory and Analysis Report
Milestone 2: Strategy	WP-03.02 Strategy and Approach
Milestone 3: Initial KM migration	WP-03.03 Content Consolidation and Migration - Initial KM Consolidation and Migration
Milestone 4: OAS / CPP migration	WP-03.03 Content Consolidation and Migration - OAS and CPP Content Migration
Milestone 5: EI migration	WP-03.03 Content Consolidation and Migration - EI Content Migration
Milestone 6: Remaining Migration	WP-03.03 Content Consolidation and Migration – Remaining Content Migration

The Contractor must deliver the following:

ID	Name	Description
WP-03.01	Content Inventory and Analysis Report	The Contractor must produce a comprehensive Content Inventory and Analysis Report that supports the development and refinement of the KM solution within the BDM Programme. This deliverable ensures that existing content is systematically assessed to identify opportunities for consolidation, improvement, and alignment with business needs across ESDC. The report must be delivered as part of the initial project phase and updated as required throughout the lifecycle, with version control managed under the Project Management work package. **Key Content Requirements** The Content Inventory and Analysis Report must include the following elements: • Content Inventory: A structured inventory capturing the following attributes for each content item: ○ Source (text description and URL if applicable)

ID	Name	Description
		○ Topic ○ Title ○ Format (e.g. text, diagram, flow chart, picture, form, audio, video) ○ Content Type (e.g. contextual, procedural, referential, glossary, troubleshooting) ○ Date Published / Modified ○ Tags ○ Word Count ○ Associated Business Process or Function, if applicable • Content Analysis: An evaluative summary of the existing content base, including: ○ Identification of duplicate content ○ Detection of knowledge gaps and missing content ○ Flagging of content requiring revision or retirement ○ Flagging of content that could be simplified or removed by automation, better UI design or in system help in the corresponding processing system the content was written for. ○ Mapping of target audience, including role and level ○ Recommendations for content consolidation or restructuring ○ Summary of findings and implications for KM solution design ○ All findings must be presented in a format that supports traceability and decision-making, including visual artefacts where appropriate (e.g. heatmaps, dashboards, or diagrams). **Compliance and Standards** • The Content Inventory and Analysis Report must comply with all applicable Government of Canada design standards. • All components must support Protected B requirements and align with IITB KM Operations protocols. • The Contractor must ensure interoperability with existing systems and platforms, including the Canada Interoperability Platform where applicable. • The architecture must adhere to security, interoperability, performance, and accessibility standards. • All documentation and artefacts must be created and maintained in a tool approved by ESDC.
WP-03.02	Strategy and Approach	The Contractor must produce a comprehensive Strategy and Approach document that outlines the methodology and execution plan for updating and managing content within the scope of the BDM Programme. This deliverable ensures that content is aligned with evolving systems, processes, and standards, and supports the effective delivery of the KM solution across ESDC. The strategy must be delivered early in the project lifecycle and updated as required, with version control managed through the Project Management work package. **Key Content Requirements** The Strategy and Approach must include the following components: • Content Update Strategy and Approach Document: A comprehensive strategy detailing how content will be updated to reflect: ○ Newly implemented systems and platforms ○ Updated templates and formatting standards

ID	Name	Description
		○ Revised Information Architecture (IA) ○ New business processes, roles, and responsibilities ○ The use of AI capabilities ○ This section must also outline guiding principles for content governance, stakeholder engagement, and change management. • A detailed Content Assessment Methodology for: ○ Evaluating existing content for relevance, accuracy, and alignment ○ Determining update requirements based on system, process, or IA changes ○ Prioritising content for revision based on business impact, user needs, and compliance requirements ○ Assessment criteria must be clearly defined and traceable to KM objectives. • Duplication and Gap Analysis identifying: ○ Duplicate or redundant content ○ Gaps in knowledge coverage or accessibility ○ Recommendations to ensure content is accurate, relevant, comprehensive, and consistent with organisational standards ○ This section must include visual artefacts (e.g. dashboards, matrices) where appropriate to support decision-making. • A defined Content Update Execution Plan for: ○ Creating, reviewing, and delivering updated content ○ Aligning content updates with future-state operations and IA ○ Ensuring stakeholder validation and approval workflows are followed ○ The execution plan must include timelines, roles, tools, and dependencies. **Compliance and Standards** • The Strategy and Approach must comply with all applicable Government of Canada design standards. • All components must support Protected B requirements and align with IITB KM Operations protocols. • The Contractor must ensure interoperability with existing systems and platforms, including the Canada Interoperability Platform where applicable. • The architecture must adhere to security, interoperability, performance, and accessibility standards. • All documentation and artefacts must be created and maintained in a tool approved by ESDC.
WP-03.03	Content Consolidation and Migration	This deliverable will be created four times: once for each of the following phases of content consolidation, migration, and reporting deliverables. • Initial KM Consolidation and Migration (shared content across all solutions) • OAS and CPP Content Migration • EI Content Migration • Remaining Content Migration The Contractor must deliver a comprehensive package to support the current phase of content consolidation and migration of shared content across all KM solutions. Each stage sets the standard for subsequent

ID	Name	Description
		migrations and ensures alignment with the centralised KM solution. The deliverable must include a forward-looking migration plan for the next phase. When the word “content” is used below, it refers to all content currently stored in the EI Online Reference Tool (EI ORT), the Common Reference Tool (CRT), IMPACT, the Integrity Operations Manual (IOM) Interactive Reference Tool (IRT) and the Knowledge Management Tool (KMT). In addition, it refers to all content linked from these tools that is stored in SharePoint as they would pertain to the phase of consolidation and migration. **Key Content Requirements** • Centralised Content Staging Environment: Consolidation of all shared content into a Protected B-compliant staging area. • Content Alignment Package: Align the content with the updated IA, style guide, standardised templates, revised processes, and role-based access models. • User Stories Documentation: Identification of representative User Stories to guide standardisation, development, and testing of KM articles. • Content Cleansing: Removal of obsolete content, correction of formatting issues, resolution of broken links, and documentation of cleansing activities. • AI-Driven Content Consolidation: Use of AI tools to aggregate and synthesise content from multiple knowledge bases into a unified repository. • Compliance with Editorial Standards: Adherence to formatting and editorial standards defined in the style guide. • Update: Update or write content as required. Consolidating or breaking out content as needed into the new solution. • Pre-Publication Validation: Verification of standardisation and compliance prior to publication. • Migration of Consolidated Content: Accurate migration of all shared content with validation of integrity and accessibility. • Stakeholder Support: Provide support to stakeholders on the review, update, and modification of the migrated content. **Reporting Requirements** • Migration Report: Documentation of migrated content dropped items, and standardisation outcomes. • Cleansing Phase Report: Summary of content updated during cleansing, with source system references. **Testing and Acceptance** • Testing: Confirm and validate the data migration was successful and confirms to all template, standards, and information architecture. Ensure all data is ready for stakeholder validation and update. **Stakeholder Validation** • Confirmation from stakeholders that migrated content reflects operational needs and expectations.

WP-04:KM Solution - Change Management

ID	Name	Description
WP-04.01	Change Impact Assessment (CIA)	A Change Impact Assessment (CIA) is required to identify the impacts and perception of change in relation to the KM solution and AI integration, based on changes to technology, processes and organization that will occur. This will drive the Change management activities to follow. The Contractor will update the CIA in advance of each release, as it will need to accommodate new business groups onboarding to the KM solution. **Key Content Development Activities** The Contractor must deliver the following activities: • 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. • 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. • Consolidate and summarize impacts captured by stakeholder groups to update and refresh the baseline stakeholder assessment and inform change planning. • Validate the CIA with all impacted stakeholder groups. The assessment for Stakeholder analysis (SA) must be based on the number of stakeholders, down to the role level when applicable, to capture the change to how work is distributed and processed. The Contractor must continue to assess and manage the change impacts and: • Use the overall degree of change and concerns or issues as the primary drivers in defining, planning, and conducting relevant CM activities for these groups. • Categorize and assess the change impacts based on processes, organization, technology, information and data, ways of working and behavior, as well as knowledge and skills. **Key Content Development Criteria** When creating the CIA, the Contractor must conform to the following quality criteria, Level of Detail, and Templates: • Use Change Management Office's (CMO) SA and CIA tool.

		• Clearly and accurately identify Impacted groups within the organization (e.g., contact centre officers, processing officers, content management writers – ESDC representative is insufficient). • Leverage BDM stakeholder profiles provided by the CMO as much as possible. • Version control must be employed for visibility into key project decisions and the downstream impacts; and • Impacts can be easily filtered for consolidation and summarization by areas, features, or impacted stakeholder groups **Compliance and Standards** • Materials must align with government standards for accessibility. • Materials must conform to Government of Canada Official Languages Act and policies, being available of equal quality and content in both official languages (English and French), therefore, enough time must be allowed for ESDC to provide translation
WP-04.02	Stakeholder identification and analysis (SIA)	The Stakeholder Identification and Analysis (SIA) will identify and assess the stakeholders involved in the KM solution and AI enablement to inform change management, training (CM&T) plans, and communications. The Contractor must provide input, update, maintain and refine the stakeholder identification and analysis for all KM Stakeholder groups in advance of each Release. The Contractor will update the CIA in advance of each release, as it will need to accommodate new business groups onboarding to the KM solution. The SIA analysis will be a living document that informs ongoing CM&T planning, activities, and communication throughout the project. **Key Content Requirements** The content must include: • Identification of stakeholders • Analysis of stakeholder interest • Level of influence for each Release, and • Stakeholder transition objectives This deliverable must include the following tabs of the Stakeholder Analysis and CIA tool: • Stakeholder List • Stakeholder Blow Out List • Stakeholder Analysis • Stakeholder Map

WP-04.03	Change Management Strategy and Plans	The Change Management plan defines the tactics proposed to support ESDC stakeholders to transition from current state to future state. Therefore, the change management plan is dependent on knowledge of future state design, it is a key input for the plan to be fulsome. The Change Management milestones must be informed and correlated to key project milestones; the project timelines are a key input to the Change Management plan. The Change Management plan also includes a communications plan outlining products and activities.
		
		Change management plans and communications should be revised for each release to account for new audiences and stakeholders specific to the various business lines.
		
		Key Requirements
		
		The Change Management Strategy and Plans must include the following materials and activities:
		
		• Developing, designing materials, integrating, executing, updating, monitoring, and reporting on the following CM plans:
		  ○ Stakeholder engagement and communication plan to build trust and inform stakeholders about changes, their rationale, and expected outcomes. Building a Change Network is expected to be a key engagement activity within the plan.
		  ○ Leadership activation and sponsor plans to drive buy-in, support and commitment to the change.
		  ○ Resistance management plan to address potential barriers to change and mitigate resistance from stakeholders.
		  ○ Training plan to equip employees with the skills and knowledge needed to navigate and embrace change (see WP-04.05).
		  ○ Change Readiness Plan to provide data driven insights into the readiness of stakeholder groups to adopt and sustain new ways of working.
		• Develop an integrated CM tactical roadmap including:
		  ○ Sequencing of all CM activities that recognize the execution/deployment of events within the ESDC landscape; and
		  ○ The integrated CM tactical road map is aligned to and integrated with the project plan and is tracked in the project management tool (ADO).
		• Facilitate stakeholder engagement and buy-in through the planning, coordination, and delivery by the contractor of engagement sessions, workshops, town halls, and/or one-on-one meetings to address concerns and solicit input and feedback. For any bilingual engagement sessions, ESDC will assist with the coordination, facilitation, and translation of artifacts.
		• Identify and engage change champions and influencers using change networks to support change initiatives and drive adoption within the organization.
		• Collaborate with project teams and cross-functional stakeholders to integrate CM activities into project and programme plans and timelines.
		• Provide ongoing support and coaching to leaders and managers to reinforce change messages and sustain change momentum.

		• Identify and raise CM related risks and issues and develop counter strategies to mitigate issues and risks in advance of each release. The contractor must deliver a communication plan and communication products and activities that include: • Developing accessible plain language key messages. • An approval matrix for communication products. • Promoting awareness and understanding of the KM Solution. • Leveraging National, Regional, and existing communication channels. • Cascading communication through a coalition of leaders and change networks mobilizing stakeholders to act and adopt the common benefits delivery platform. • Define the schedule for communication activities to ensure timeliness and prevent overlap for multiple stakeholders. • Follow direction from Canada on communication timing and distribution; and • All communications materials produced by the Contractor to conduct or support the KM Solution CM, Communications or training activities must conform with Government of Canada Accessibility requirements: o Have a common look and feel. o Meet federal standards for bilingualism (per Compliance and Standards below). o Common set of overarching key messages. o Contribute to a positive integrated narrative about BDM. **Compliance and Standards** • Materials must align with government standards for accessibility. • Materials must conform to Government of Canada Official Languages Act and policies, being available of equal quality and content in both official languages (English and French), therefore, enough time must be allowed for ESDC to provide translation
WP-04.04	Training Needs Assessment (TNA)	The Training Needs Assessment captures the changing nature of work for end users and is used to bridge the skills gaps. It must be reviewed and, if applicable, updated for each release. Key Content Requirements and activities • Identification of Training Needs: The Contractor is required to assess the implications of the changes outlined in the Change Impact Assessment (CIA) to determine the specific learning needs of each stakeholder group. This assessment should include a thorough identification of skill gaps that correspond with the changes specified in the CIA.

		• Data Collection Methods: Stakeholder input will be documented and incorporated from various methods used to gather information on training needs, including: • Surveys and questionnaires • Interviews with key stakeholders • Focus groups or workshops • Observation of current practices • Review of existing training materials • Analysis of Skills Gaps: The Contractor will compare current capabilities with required skills for new roles or processes, emphasizing gaps that need addressing through training. This will result from the inclusion of various methods of data collection (surveys, interviews, focus groups). • Prioritization of Training Needs: Training needs will be evaluated and prioritized based on the level of impact, number of stakeholders affected, and urgency of the skills required. Training programs will be clearly defined, linked to identified needs. • Recommendations for Training Solutions: The Contractor will propose specific training interventions (e.g., workshops, e-learning modules, hands-on training) that align with identified needs. • Documentation of Findings: The contractor will consolidate findings into a comprehensive report that outlines identified gaps, methodologies used for assessment, and recommended training programs. The TNA findings and proposed training solutions report must be validated and approved by relevant stakeholders.
WP-04.05	Training Plan	The Contractor must provide a training plan and curriculum to upskill end users and bridge skills gaps identified in the TNA. The final Training Plan document must receive endorsement from all relevant stakeholders, ensuring collaborative agreement and support for the training efforts. It must be reviewed and, if applicable, updated for each release. **Key Content Requirements** The Contractor must ensure the following elements are included: • Objectives: Clearly defined goals and objectives tailored to meet the training needs identified in the TNA and stakeholder analysis to support KM practices. The training plan must clearly leverage findings from the stakeholder analysis and TNA to demonstrate that it meets the identified training needs for KM. • Training Strategies: Descriptions of the strategies to be utilized for effective training delivery tailored for various stakeholders, ensuring that diverse learning methods are addressed for varied roles. The

		objectives must articulate measurable outcomes that contribute to the overall success of the KM solution. • Training Activities: Specific activities planned that correlate directly to the training objectives. This section should include workshops, courses, and practical exercises, linked to stakeholder roles and TNA findings. • Roles and Responsibilities (RASCI): Inclusion of a clearly defined RASCI matrix to clarify roles among stakeholders for each training activity (Responsible, Accountable, Supportive, Consulted, Informed). The RASCI matrix must clearly define responsibilities for all training activities, ensuring transparency and understanding among participants. • Role-Based Training Curriculum: Identification of role-based training paths, specifying: o Assigned Subject Matter Experts (SMEs) responsible for delivering training. o Course durations and detailed course objectives that focus on continuous learning and competencies tailored to various roles. • Timeline: Comprehensive timeline outlining the schedule for execution of training sessions (TTT as well as staff), milestones, and assessment points. The Contractor must conduct the TTT sessions and coordinate with ESDC for conducting the sessions for the staff. • Integration: Ensure that the Training Plan is integrated with other Knowledge Management Change Management (CM) plans, referencing synergies and ensuring consistent messaging across initiatives. Evidence of integration with other KM CM plans should be clearly articulated in the plan, demonstrating coherence and alignment with overarching change management strategies. • Evaluation Method: Establish criteria and approaches for assessing training effectiveness, including feedback collection and performance metrics to ensure that learning is being effectively transferred and applied.
WP-04.06	Training Materials (End User)	The contractor is required to develop training materials utilizing various training tools that includes work integrated modalities and establish a feedback mechanism for ESDC to validate the materials. Materials must be updated, if applicable, for each release. **Key Content Requirements** The contractor must use the following criteria in developing and delivering training materials: • Design and develop all types of training materials listed (Job Aids, Quick Reference Guides, Supplemental Content, Training Manuals, Interactive Learning Modules, Video Tutorials, Webinars/Live Training Sessions, and Feedback Mechanism). • The materials cater to the diverse needs and preferences of different user roles; particularly specific needs identified in the Training Needs Assessment (TNA). • All materials include visual aids (screenshots, diagrams, flowcharts) where applicable to enhance understanding and usability.

		• All materials undergo a review process by Subject Matter Experts (SMEs) and stakeholders to verify accuracy and relevance before finalization. • A centralized document repository is established where all training materials can be easily accessed by end users. Coordinate with ESDC to ensure this common repository is easily accessible and confirms to ESDC's training guidelines and policies. • Materials are organized logically and intuitively, allowing users to navigate and find the information they need efficiently. • Interactive elements (e-learning modules, quizzes, and video tutorials) are included to foster engagement and support various learning styles. • Feedback mechanisms (surveys, comment sections) are integrated to allow users to provide input on materials, which will be reviewed regularly to inform updates. • Revisions based on feedback should be made within a specified timeframe to ensure materials remain relevant and effective. • A schedule for developing and validating training materials must be created, allowing sufficient time for ESDC to translate. • Users must have the opportunity to complete and assess their learning through structured evaluations (e.g., quizzes, practical assessments) related to the training materials. • Evaluation metrics should be established to gauge the effectiveness and impact of training on user performance. • All training materials must be ready and available prior to the initiation of formal training sessions and deployments to ensure users have access to resources when needed. • A communication plan is in place to inform end users about the availability of training materials and how to access them. **Compliance and Standards** • Materials must align with government standards for accessibility, written in clear, plain language easily understood by end users. • Materials must conform to Government of Canada Official Languages Act and policies, being available of equal quality and content in both official languages (English and French), therefore, enough time must be allowed for ESDC to provide translation
WP-04.07	Train the trainer (TTT) materials	The Contractor must develop Train the Trainer (TTT) materials and coordinate with ESDC to deliver bilingual sessions for each of the releases. The revised vendor training materials following each release will be used for training system administrators, product owners, SMEs/business champions, and end users in the Knowledge Management (KM) system. These materials must facilitate effective understanding and use of KM tools and processes. **Key Content Requirements**

		TTT Materials will: • Be tailored to the specific needs of various roles (e.g. system administrators, product owners, SMEs/business champions, and end users). • Be fully accessible, adhering to Web content accessibility guideline standards, and available in both official languages (English and French). ESDC will be providing the translated content in French. • A comprehensive suite of resources is provided, including presentations, job aids, manuals, and online courses for each designated role. • Stakeholder review and approval of the revised materials is documented, with feedback incorporated into the final version. • Training sessions utilizing the materials are successfully conducted in both official languages, with participant feedback indicating clarity and effectiveness. • A mechanism for continuous improvement is established, enabling regular gathering of participant feedback to enhance materials and training methods. **Compliance and Standards** • Materials must align with government standards for accessibility, written in clear, plain language easily understood by end users. • Materials must conform to Government of Canada Official Languages Act and policies, being available of equal quality and content in both official languages (English and French), therefore, enough time must be allowed for ESDC to provide translation
WP-04.08	Change Readiness Report	The Contractor must provide a Change Readiness Report that assesses the organization's capability to adopt new technology and adapt to new practices following each release. This report must be completed after training and will inform the Go/No Go decision for each release. **Key Content Requirements** The Change Readiness Report must include the following: • The report must be developed in advance of each release and include data-driven insights to support readiness for the Go/No Go decision. • Definition of readiness, establishment of readiness KPIs, and development of a tactical readiness plan, documented and communicated. • Survey instruments (readiness surveys and training evaluation surveys) must be created, administered in Qualtrics, and used to gather relevant data.

		• Pre- and post-deployment adoption and productivity metrics are included and reported to demonstrate readiness effectiveness. • Qualitative data must be effectively captured through focus groups, interviews, and engagement activity feedback to supplement quantitative data. • Analysis of results must include heatmap and dashboard reporting for impact assessments, ensuring alignment with leadership expectations. • Integration of change management activities into the Readiness Plan must be documented and visible. • Issues tracked and reported once baseline survey information is available. • Establishment and tracking of change adoption KPIs such as user engagement, satisfaction scores, and system utilization rates must be documented and evaluated post-transition. • A monitoring plan for post-transition adoption and productivity levels must be developed and communicated to address any residual change resistance and reinforce adoption, collaborating with operational teams, as necessary.

WP-05: Release Management and Transition

ID	Name	Description
WP-05.01	Release Plan and Scheduling	The Contractor must create a release plan and scheduling documentation that serves as a blueprint for each release process, providing clarity, structured timelines, and defined responsibilities. to detail the stakeholder coordinating efforts, managing risks, ensuring quality, and aligning team objectives and stakeholder expectations. This also includes key content requirements that ensures that all stakeholders are aligned and that the release is executed smoothly, on time, and within scope. All documentation must be delivered in an acceptable format agreed upon with ESDC. **Key Content Requirements** The release plan and scheduling documentation must include the following:

ID	Name	Description
		• A comprehensive release plan along a timeline for various phases of the projects (development, testing, pre prod, prod etc.). • A comprehensive release plan for various releases along with the timelines. • Each release would identify **clear** objectives and scope for what will be delivered in each release, helping teams understand the priorities and focus their efforts accordingly. • Identify potential risks (e.g., dependencies, technical challenges, or integration issues) early in the process, allowing teams to develop mitigation strategies. • Provide a framework for iterative development and continuous improvement, allowing teams to adapt their plans based on feedback from previous releases or changing business priorities. • Establish benchmarks for measuring progress. It helps track whether the project is on schedule and allows for adjustments if delays occur. • Define and measure criteria for successful completion (e.g., completed features, user acceptance criteria) and identify when a release is ready for deployment. • Following each release, review, analyse and document the successes and misses and provide information for future improvements. • Document lessons learned and incorporated the lessons learned in future releases. • Roll-Back playbooks outlining the steps that need to be followed to revert to last working version of the Solution (including data) should the shakedown process uncover issues. • Process for oversight, management and escalation of deployment and cutover issues. **Compliance and Standards** • Ensure that all relevant documentation, including product specifications, release notes, user manuals, and knowledge transfer documents, meet organizational and regulatory requirements. • Maintain proper documentation for auditability, including records of decisions made during the release process, task assignments, and approvals. • Ensure all functional and non-functional requirements are implemented or slated for implementation in all releases. • Ensure compliance with all nonfunctional requirements (performance, security, accessibility etc.).

ID	Name	Description
		• Implement CI/CD practices or any other agree upon process, to streamline the release process, including automated testing and deployment pipelines to improve efficiency and reliability.
WP-05.02	Release inventory and Checklist Validation.	The Contractor must produce the release inventory and checklist validation to ensure that all the necessary elements of a software release are accounted for, that quality standards are met, and that the release is executed smoothly. The Checklist Validation would systematically verify that all items in the release inventory meet their quality and readiness criteria before being deployed. These processes help ensure successful and reliable software releases, significantly reducing the risk of issues arising post-deployment. They promote thorough documentation, accountability, and effective communication among all stakeholders involved in the release process. It involves using a checklist to ensure each aspect of the release has been tested, reviewed, and approved. **Key Content Requirements** • Provide the Release Inventory with a comprehensive list of all items, features, bug fixes, and associated documentation that are included in a particular software release. It serves as a checklist to ensure that everything required for the deployment is in place. o Provide detailed descriptions of all new features implemented in the release, including user stories or requirements linked to each feature. o Provide a list of defects or issues that have been resolved in the current release, along with their severity and the associated ticket or issue ADO IDs. o Confirming that all planned features and bug fixes have been completed and code reviewed. o Ensuring that all components have undergone the necessary testing (unit testing, integration testing, acceptance testing) and were successful. o Verifying that UAT has been performed successfully by end-users and that feedback has been addressed. o Any improvements made to the codebase or system performance that address known technical debts, such as code refactoring. o Any updates to system configurations that are necessary for the release, including database migrations or changes to server settings. o Identification of any user manuals, release notes, or operational documentation that need to be updated or created for the new release. o A list of any external libraries, APIs, or services that the release relies on, including version numbers.

ID	Name	Description
		○ Verification that the release meets necessary compliance requirements for all non-functional requirements. ○ Confirming that all necessary documentation is in place, updated, and distributed to relevant stakeholders. ○ Ensuring that key stakeholders have reviewed and approved the release, including product owners, project managers, and potentially end-users. ○ Detailed steps on how to deploy the release, including any necessary actions for rollback. ○ Checking that the deployment plan is prepared, and rollback procedures are in place in case issues arise. ➢ Ensuring there is a plan for communicating the release to all stakeholders, including users, support teams, and any other affected parties **Compliance and Standards** • Compliance with data protection regulations to ensure that Protected B or sensitive data is handled appropriately in the release process. • Establish a standard format for release inventory and checklist documents to ensure clarity and uniformity (e.g., utilizing templates with specified data fields). • Employ version control systems to maintain an audit trail of changes and updates made to release documents • Adhere to Agile principles that promote adaptive planning and iterative design, particularly for maintaining the release inventory. • Implement DevOps practices that enhance collaboration between teams, streamline automation in testing and deployment, and ensure quick feedback during the checklist validation. • Maintain audit trails of the compliance checks performed during checklist validation, ensuring that all steps comply with established standards and that decisions made are documented, understood, and maintainable.
WP-05.03	Technical Systems Documentation	The Contractor must produce comprehensive Technical Systems Documentation specific to the Knowledge Management (KM) solution. This deliverable ensures that the KM system is well-defined, accurately reflects its architecture, and describes its functionality, thereby supporting effective knowledge sharing and management across the ESDC. The documentation must outline both current functionalities and anticipated future enhancements, evolving in alignment with the

ID	Name	Description
		project lifecycle. The initial approved version will be tracked as part of this work package, with subsequent updates managed through the Project Management work package following each release. The specific documents may vary based on the complexity of the solution, the methodologies used (e.g., Agile, Waterfall), and organizational standards. The Contractor must produce and provide links and version indicators (where required) to the following Solution Artifacts to capture the final Release content. **Key Content Requirements** The Technical Systems Documentation must include the following elements: • System Architecture Overview: A detailed description of the KM solution's architecture, including diagrams that illustrate system components, their relationships, and data flow. • Functional Specifications: Comprehensive descriptions of KM solution features and functionalities, including user roles, permissions, and access controls. • Database and Data Model: Detailed documentation of the data schema, including entities, attributes, relationships, and any data governance practices that support content organization and retrieval. • Integration Points: Specifications for how the KM solution integrates with existing systems and platforms within ESDC, including API definitions and communication protocols where applicable. • Content Management Procedures: Guidelines detailing the processes for creating, maintaining, and archiving knowledge articles, including workflows, user responsibilities, and content lifecycle management. • Security and Compliance Considerations: Documentation of security measures implemented in the KM solution, including user authentication, data protection strategies, and compliance with applicable regulations and standards. • Taxonomy and Metadata Standards: Definitions of the metadata schema and taxonomy used for content classification, retrieval, and curation within the KM solution. • Design Specifications: Comprehensive design specifications of KM solution features and functionalities, including the following: o Functional Design Documents (FDDs) o Interface Design Documents (IDDs) o Technical Design Documents (TDDs) • Provide source code for all Features included in the Release including: o Configurations, Customization and Extensions where relevant o Interfaces Code

ID	Name	Description
		○ Digital Channel Code ○ Reporting and Analytics Code ○ Data Reconciliation Code ○ Third Party Components and Libraries ○ Automated Regression Test Suite used for Regression testing of the Release • Provide a comprehensive troubleshooting guides that will provide step-by-step instructions and procedures for managing and supporting the overall solution, including pre and post deployment procedures and considerations. Documentation must include any manual or automated pre-deployment and post deployment steps as well as service impacts and duration. Aspects should include the following: ○ Content Repositories ○ User Interfaces • The Contractor must provide a rollback procedure for each release to mitigate the risk of failed deployments. The procedure must include: • A rollback verification test to confirm system stability post-rollback. • Rollback conditions, specifying when rollback is mandatory versus when mitigation strategies should be attempted first • The impact on service desks and client communication if rollback affects production environment. Note: For artifacts created by the ESDC, links will be provided in a timely manner prior to Go-Live or will be added post sign-off of the deliverable by the ESDC. All diagrams and artifacts must be created and maintained in a tool approved by ESDC.
WP-05.04	Release management for Release 1 (MVP) and any subsequent Releases	The Contractor must implement a comprehensive Release Management plan for the Knowledge Management (KM) solution, starting with Release 1 (Minimum Viable Product - MVP) and continuing through any subsequent releases. This deliverable ensures that the KM solution is deployed efficiently, effectively, and in a manner that meets the evolving needs of users across the ESDC. Each release will be meticulously planned, executed, and documented, ensuring that all stakeholders are informed and adequately prepared for changes to the system. **Key Content Requirements** The Release Management documentation must include the following elements: • Release Planning:

ID	Name	Description
		○ Detailed timelines and roadmaps outlining the phases of Release 1 (MVP) and subsequent releases. ○ A description of the features and functionalities included in each release, specifically how they support KM objectives including the following: ➢ Create outstanding defects and bugs in ADO. ➢ Produce Release Notes. ➢ Produce a report with the results from the release completion. ➢ Present at an executive showcase. ➢ Produce a release audit log detailing version history, deployment status, rollback events, and approvals ➢ Produce post release lessons learned. ➢ Produce and maintain a post-release checklist and tracking it through tools like ADO. • Change Management Processes: ○ Procedures for submitting, reviewing, and approving change requests for future releases, including roles and responsibilities. ○ A log of all changes made in each release, including enhancements, bug fixes, and new functionalities. • Deployment Strategy: ○ Clear instructions for deploying the KM solution, including pre-deployment validation checks and post-deployment monitoring. ○ Rollback procedures to address any issues that occur during deployment. • Stakeholder Communication Plan: ○ A communication strategy to inform stakeholders about upcoming releases, including training sessions, release notes, and user documentation updates. ○ Feedback mechanisms for users to provide input or report issues related to the KM solution following each release. • User Training and Support: ○ A comprehensive training plan for users that outlines how training will be delivered for new features introduced in each release. ○ Support resources, including FAQ documents, troubleshooting guides, and access to help desk services. • Evaluation Metrics:

ID	Name	Description
		○ Key performance indicators (KPIs) and success criteria to evaluate the effectiveness and user adoption of each release, helping to inform future development cycles. • Lessons Learned: ○ Key performance indicators (KPIs) and success criteria to evaluate the effectiveness and user adoption of each release, helping to inform future development cycles. The Contractor must document all post release lessons learned and maintain a post-release checklist and tracking through tools like ADO. All Release Management documentation must be stored in a centralized location accessible to relevant stakeholders and must follow the tools and templates approved by ESDC. **Compliance and Standards** The Release Management plan must comply with all applicable Government of Canada standards for software deployment and project/product management practices. The processes must align with Protected B requirements, ensuring that all sensitive data managed within the KM solution is appropriately handled during releases. Additionally, the Contractor must ensure that the KM solution adheres to IITB KM Operations protocols, including security, accessibility, and interoperability standards, to facilitate a smooth transition for all users and minimize disruptions in knowledge sharing and operations.
WP-05.05	Implementation Decision Document/Report (IDD/IDR)	The Contractor must produce a comprehensive Implementation Decision Document for the Knowledge Management (KM) solution. This deliverable outlines the key decisions made throughout the implementation process, focusing on the rationale behind choices related to design, technology, data management, and user engagement. The document will serve as a historical record that provides clarity and justification for strategic directions taken during the project's lifecycle, ensuring alignment with organizational goals and industry best practices. **Key Content Requirements** The Implementation Decision Document must include the following elements: • Overview of Implementation Objectives: ○ A clear statement of the objectives guiding the implementation of the KM solution, including how these objectives support ESDC’s strategic vision for knowledge management. • Relevant Stakeholders and Contributors:

ID	Name	Description
		○ Identification of key stakeholders involved in the decision-making process, including KM specialists, IT personnel, business leaders, and end-users, along with their roles and responsibilities. • Decision-Making Criteria: ○ A documented set of criteria used to evaluate options during the implementation process, including factors such as scalability, usability, security, alignment with organizational standards, and compliance with government regulations. ○ A 1-page deliverable including Go/No-Go checklist of Criteria that must be met, completed, and approved before Deployment. References to the 'Approval to Deploy' and 'Acceptance Report' documents which are required as pre-requisites for go-live. ○ Complete the requirement reports for ESDC governance such Acceptance Report and Approval to Deploy Form. 'Approval to Deploy' Document confirms that the release of this solution has been fully developed, tested, and is ready to be deployed/installed, which will include solution readiness, production data readiness, business readiness, security and infrastructure, operational readiness, and department approval to deploy. ○ Acceptance Report' Document will be a grid summary of the 'Approval to Deploy' Document, which contains the acceptance approach, acceptance activity, date completed, and acceptable flag (e.g., solution development completed on DD/MM/YYYY with acceptance flag 'Yes'). • Platform and Tools Selection: ○ Justification for the selection of specific technologies, software, and tools used in the KM solution, including AI tools, content management systems, collaboration tools, and analytical platforms. ○ Rationale for the architecture choices made, detailing how the chosen solutions meet current needs and can accommodate future growth. • Data Management Strategies: ○ Decisions regarding data collection, storage, retrieval, and security, including how metadata standards and taxonomies will be implemented to facilitate effective knowledge sharing. • User Experience Considerations:

ID	Name	Description
		○ Insights and decisions made relating to user interface design and user experience, ensuring that the KM solution is user-friendly and meets the diverse needs of ESDC stakeholders. • Change Management Approach: ○ A description of how changes will be managed during implementation, including training plans, stakeholder communication strategies, and feedback mechanisms. • Risk Assessment and Mitigation: ○ Identification of potential risks associated with the implementation of the KM solution and the strategies put in place to mitigate these risks. • Review and Approval Process: ○ Details on how the document will be reviewed and approved by relevant stakeholders, ensuring accountability and alignment with project goals. All decisions documented must be clearly articulated and substantiated, providing a transparent view of the implementation process for current and future stakeholders. Compliance and Standards The Implementation Decision Document must adhere to all applicable Government of Canada standards and best practices for project documentation and knowledge management initiatives. It should reflect compliance with Protected B requirements, ensuring that sensitive data and decision-making processes are handled with due diligence. Furthermore, the document must align with IITB KM Operations protocols and relevant standards regarding interoperability, security, performance requirements, data governance, and accessibility to ensure comprehensive and responsible implementation of the KM solution.
WP-05.06:	Post-Release Monitoring Support	The Contractor must provide comprehensive Post-Release Monitoring Support for the Knowledge Management (KM) solution following the deployment of each release. This deliverable ensures that the system operates effectively, user feedback is collected, and any issues are promptly addressed to enhance the overall user experience and functionality of the KM solution. Continuous monitoring will facilitate ongoing improvements and align the solution with the evolving needs of ESDC. Key Content Requirements The Post-Release Monitoring Support must include the following elements: • Monitoring Objectives: ○ Clear objectives for monitoring the KM solution post-release, focusing on system performance, user engagement, and overall knowledge management effectiveness. ○ Adress critical incidents.

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		○ Implement hotfixes or rollback within pre-defined and agreed upon response times for issue resolution. ○ Provide post-release support, resolving post-deployment issues and ensuring that user acceptance testing is completed successfully. • Performance Metrics: ○ Established key performance indicators (KPIs) for evaluating the system's performance, including measures such as system uptime, response times, and user access metrics. ○ Metrics to gauge user adoption and satisfaction, such as the number of active users, frequency of interactions, and feedback scores. • User Feedback Mechanisms: ○ Strategies for collecting user feedback regarding the KM solution, including surveys, interviews, and focus groups to assess experience and identify areas for improvement. ○ A structured process for documenting, analyzing, and responding to user feedback. • Issue Tracking and Resolution: ○ A system for identifying and tracking post-release issues, including a clear escalation path for concerns raised by users. ○ Documentation of resolution efforts for identified issues, ensuring transparency and accountability. • Regular Reporting: ○ Schedule for regular reports summarizing monitoring results, user feedback, and system performance, which will be shared with relevant stakeholders to inform ongoing decision-making. ○ Evaluation of the effectiveness of features introduced in recent releases, highlighting successes and areas for improvement. • Continuous Improvement Strategies: ○ Recommendations for adjustments and enhancements based on monitoring data and user feedback, ensuring that the KM solution continues to evolve in line with user needs and organizational goals. ○ Planning for future updates, including prioritizing enhancements based on monitored performance and user input. • Training and Support Materials Updates:

ID	Name	Description
		○ Procedures for revising training materials and user support documents based on insights gained during post-release monitoring, ensuring that all stakeholders continue to receive accurate and relevant information. All monitoring actions and findings should be documented within a centralized repository accessible to stakeholders, allowing for collaborative assessment and ongoing refinement of the KM solution. **Compliance and Standards** The Post-Release Monitoring Support must comply with all applicable Government of Canada standards for software maintenance and quality assurance practices. The Contractor must ensure that all monitoring efforts support Protected B requirements, adequately safeguarding sensitive data. Additionally, the monitoring practices must align with IITB KM Operations protocols and relevant accessibility, security, performance, and interoperability standards, fostering a supportive environment for effective and sustainable knowledge management within ESDC.
WP-05.07:	Post Release Lessons Learned	The Contractor must compile a comprehensive "Lessons Learned" document following each release of the Knowledge Management (KM) solution. This deliverable serves to capture insights gained throughout the implementation and post implementation phases, providing valuable guidance for future releases and projects. The documentation will help refine processes, improve stakeholder engagement, and enhance the overall effectiveness of the KM solution at ESDC. **Key Content Requirements** The Post Release Lessons Learned document must include the following elements: • Overview of the Release: ○ A brief summary of the objectives, features, and functionalities introduced in the release, along with the anticipated outcomes and goals. • Successes and Achievements: ○ Identification of key successes attributable to the release, highlighting effective strategies, user engagement levels, and positive impacts on knowledge sharing and collaboration. ○ Documentation of metrics and KPIs that indicate successful outcomes, such as increased user adoption rates or improved system performance. ○ Identify and document all post release lessons learned. • Challenges and Issues Encountered: ○ A thorough analysis of challenges faced during the release process, including technical difficulties, user resistance, and unexpected issues.

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		○ Insight into how these challenges were addressed, including any immediate resolutions and strategies for long-term improvements. • Feedback Summary: ○ Compilation of feedback gathered from users post-release, including surveys, interviews, and usability testing results. ○ Analysis of common themes or areas of concern raised by users, along with suggested improvements. • Recommendations for Future Releases: ○ Strategic recommendations based on the lessons learned, aimed at improving processes, documentation, and user training for subsequent releases. ○ Insights on how to enhance user experience, system functionality, and overall project management practices. • Process Improvements: ○ Identification of process improvement opportunities based on the experiences from the release, including adjustments to workflows, communication strategies, and stakeholder engagement approaches. ○ Maintain a post-release checklist and tracking through tools like ADO. • Individual Contributions: ○ Recognition of contributions from team members and stakeholders who played significant roles during the release, fostering a culture of collaboration and learning. The Post Release Lessons Learned document should be structured clearly and shared with all relevant stakeholders, providing a foundation for continuous improvement and strategic planning. **Compliance and Standards** The Post Release Lessons Learned document must adhere to all applicable Government of Canada standards for project documentation and knowledge management practices. It should reflect compliance with Protected B requirements, ensuring that sensitive information remains secure while fostering an environment of transparency and collective learning. Additionally, the recommendations and insights should align with IITB KM Operations protocols, incorporating best practices for accessibility, security, performance, and interoperability in future KM initiatives at ESDC.
WP-05.08:	Rollback Procedures	The Contractor must establish comprehensive Rollback Procedures for the Knowledge Management (KM) solution to ensure a smooth and effective method for reverting to a previous system state in the event of issues encountered during or after a release. These procedures will

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		help mitigate risks associated with new deployments and ensure that users can continue accessing critical knowledge resources without significant disruption.
		Key Content Requirements
		The Rollback Procedures must include the following elements:
		• Overview of Rollback Objectives:
		  ○ A clear statement of the purpose and importance of rollback procedures, emphasizing their role in maintaining system stability and user confidence in the KM solution.
		• Criteria for Rollback Activation:
		  ○ Specific conditions and thresholds that necessitate a rollback, such as significant performance degradation, critical system failures, or widespread user dissatisfaction.
		  ○ Documenting rollback conditions, specifying when rollback is mandatory versus when mitigation strategies should be attempted first. In so doing, consider the impact on service desks and ensure client communication if the production environment is affected.
		• Rollback Preparation:
		  ○ Documentation of pre-release activities, including the creation and maintenance of backup copies of data, system states, and configurations prior to deployment.
		  ○ Guidelines for documenting the current state of the KM solution before a release, ensuring comprehensive records are available for restoration.
		  ○ Establish a rollback verification test to confirm system stability post-rollback.
		• Rollback Steps:
		  ○ Clear, step-by-step procedures for executing a rollback, detailing specific actions to restore the system to its previous state, including:
		  ➢ Notifying stakeholders about the decision to initiate a rollback.
		  ➢ Steps for disabling access to the new version of the KM solution.
		  ➢ Procedures for restoring data and configurations from backup.
		  ➢ Verification processes to ensure that the rollback has been conducted successfully and the system is functioning as expected.
		• Testing the Rollback:
		  ○ Guidelines for testing the rollback procedures in a controlled environment to ensure their reliability and effectiveness before they are needed in a production scenario.

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		○ Recommendations for conducting thorough testing to validate data integrity and functionality after the rollback. • Documentation and Communication: ○ Procedures for documenting the rollback process, including lessons learned and any issues encountered during the execution. ○ A communication plan to inform users and stakeholders of the rollback, providing information on expected downtime, system accessibility, and support resources. • Post-Rollback Review: ○ Steps for conducting a review after a rollback has been completed, to assess the effectiveness of the procedures and identify any areas for improvement. ○ Recommendations for enhancing future deployments based on insights gained during the rollback process. All Rollback Procedures must be clearly documented, easily accessible, and communicated to all relevant team members and stakeholders, ensuring a coordinated response to any issues that arise during the deployment of the KM solution. **Compliance and Standards** The Rollback Procedures must comply with all applicable Government of Canada standards for information management and IT security. The procedures should be designed to support Protected B requirements, ensuring that sensitive data is securely managed throughout the rollback process. Additionally, the guidelines should align with IITB KM Operations protocols, incorporating best practices for security, accessibility, performance, and operational continuity within the context of the KM solution.
WP-05.09	Knowledge Transfer Strategy, Approach and Plan	The Contractor must develop a comprehensive Knowledge Transfer Strategy, Approach, and Plan for the Knowledge Management (KM) solution. This deliverable aims to facilitate the effective sharing of knowledge and expertise among stakeholders, ensuring that institutional knowledge is captured, preserved, and easily accessible. The plan will support the organization's goal of continuous learning and improvement, enabling staff to leverage the KM solution to its fullest potential. **Key Content Requirements** The Knowledge Transfer Strategy, Approach, and Plan must include the following elements: • Objectives of Knowledge Transfer:

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		○ A clear definition of the goals and objectives of the knowledge transfer initiative, outlining how it supports the overall KM strategy and enhances organizational capabilities. ○ This includes determining the specific areas of knowledge that need to be transferred, the desired level of proficiency and skillsets for the Recipient team, and any specific timelines to be achieved. • Target Audiences: ○ Identification of key stakeholders and groups that will benefit from knowledge transfer, including employees, management, and external partners, along with their specific knowledge needs. • Methodology and Approaches: ○ Description of the methodologies to be utilized in the knowledge transfer process based on the recipients' unique requirements, resources, and constraints, including how best to deliver KT by target audience: ➢ Training Programs: Development of workshops, seminars, and training sessions and other methods (shadowing, hands on practice, reverse shadowing etc.) tailored to different skill levels and functions, in both official languages. ➢ Documentation: Creation of thorough and user-friendly documentation, manuals, and resources to facilitate self-directed learning in both official languages. ➢ Mentorship and Coaching: Strategies for pairing experienced staff with newer employees to provide ongoing support and knowledge sharing. ➢ Community of Practice: Establishment of forums or groups where individuals can connect, share experiences, and collectively solve challenges. Identifying roles and responsibilities of the Contractor and recipient. • Knowledge Capture and Curation: ○ Procedures for systematically capturing and curating knowledge from various sources, including project documentation, user feedback, and lessons learned. ○ Guidelines for organizing and tagging knowledge assets in the KM system for easy retrieval and use. ○ Planned knowledge transfer artifacts. These must include: ➢ Knowledge Transfer Checklists

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		➢ Progress Reports ➢ Knowledge Transfer / Handover Templates ➢ Risk Analysis of Knowledge Loss ➢ Knowledge prioritization framework ➢ Detailed documentation covering all aspects of the solution, including architecture, design, configuration, workflows, customizations, and integrations. ➢ Required Recipient user groups ➢ Mechanism for knowledge retention / Recipient access to the knowledge base ➢ Methods of knowledge capture ➢ Information security and management guidelines, where not previously defined ➢ Information sharing practices and locations where information will be stored ➢ Prioritized KT topics to be covered, by user group with rationale supporting the priorities. • Implementation Timeline: o A detailed timeline for the rollout of the knowledge transfer activities, outlining key milestones and deadlines for various training sessions, document releases, and feedback collection initiatives. o The plan must include transition of all developed processes and documentation that is not deemed client confidential, including: ➢ Governance ➢ Transition Governance plan, roles, and responsibilities. ➢ Knowledge Transfer ➢ Reporting cadence, along with progress report artifacts ➢ Proposed schedule / timeline of KT, including ramp-up period. ➢ Project Management ➢ Transition risk register and accompanying mitigation and contingency plans. ➢ Proposed schedule for transition activities ➢ Reporting framework to track transition progress. ➢ Acceptance criteria for transition. ➢ Communication plan.

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		○ Artifacts including: • Transition and KT checklists. • Lessons learned plan / template. • Template for Operational Status Reports. • List of stakeholders & transition objectives • Evaluation and Metrics: ○ Identification of metrics and evaluation methods to assess the effectiveness of the knowledge transfer initiatives, including user satisfaction surveys, usage analytics, and competency assessments. ○ Regular intervals for reviewing and adjusting the knowledge transfer approach based on feedback and performance data. • Communication Plan: ○ Strategy for communicating the knowledge transfer initiatives to stakeholders, ensuring awareness and engagement. ○ Regular updates and channels for feedback to enhance ongoing participation. • Sustainability and Continuous Improvement: ○ Plans for maintaining the knowledge transfer process over time, including provisions for continual updates, refresher training, and new knowledge capture as the KM solution evolves. All aspects of the Knowledge Transfer Strategy must be well-documented, easily accessible, and referenced throughout the implementation of the KM solution to reinforce its significance and promote cultural acceptance of knowledge sharing within ESDC. **Compliance and Standards** The Knowledge Transfer Strategy, Approach, and Plan must adhere to all applicable Government of Canada standards for training and knowledge management practices. The approach must ensure compliance with Protected B requirements, safeguarding sensitive information while facilitating open knowledge exchange. Additionally, the plan should align with IITB KM Operations protocols and relevant accessibility standards, ensuring that all stakeholders have equitable access to training and knowledge resources.
WP-05.10	Knowledge Transfer Complete Report	The Contractor must produce a comprehensive Knowledge Transfer Complete Report following the execution of the Knowledge Transfer Strategy and activities for the Knowledge Management (KM) solution. This deliverable document the extent, effectiveness, and outcomes of knowledge transfer initiatives, encompassing insights gained, challenges encountered, and recommendations for future

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		improvements. The report serves as a critical resource for understanding the success of the knowledge transfer process and ensuring the sustainability of knowledge sharing within the organization.
		Key Content Requirements
		The Knowledge Transfer Complete Report must include the following elements:
		• Executive Summary:
		  ○ A high-level overview of the knowledge transfer activities conducted, including objectives, key findings, and overall impact on the organization.
		• Objectives and Scope:
		  ○ A clear outline of the objectives of the knowledge transfer initiatives, specifying the goals intended to be achieved and the scope of the activities undertaken.
		• Description of Knowledge Transfer Activities:
		  ○ Detailed documentation of all training sessions, workshops, mentorship programs, documentation efforts, and community of practice initiatives, including:
		  ➢ Dates and locations of events.
		  ➢ Training materials and resources developed.
		  ➢ Participation metrics and demographics.
		• Effectiveness Evaluation:
		  ○ Analysis of the effectiveness of the knowledge transfer activities, utilizing feedback collected from participants, performance metrics, and comparisons to established success criteria.
		  ○ Summary of user satisfaction surveys, competency assessments, and any observed improvements in job performance or knowledge use attributable to the training.
		• Lessons Learned:
		  ○ Identification of key lessons learned throughout the knowledge transfer process, including successes, challenges, and unexpected outcomes.
		  ○ Recommendations for refining future knowledge transfer efforts based on this analysis.
		• Knowledge Capture Outcomes:
		  ○ Overview of knowledge captured during the transfer process, including curated documentation, templates, best practices, and user-contributed insights.
		  ○ Details on how captured knowledge has been integrated into the KM system for long-term accessibility.

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		○ Completed transition checklists developed according to the plan. ○ Links to repositories for completed knowledge transfer checklists, scheduled progress reports, and completed handover templates. ○ A list of formal sessions (including any supplemental sessions that were added), summary of the content, attendees, and progress against the lesson plan. ○ Progress for all streams against planned schedule ○ Summary of any deviations from the knowledge transfer plan and strategy, accompanied by rationale and alternative actions taken. ○ Identification of areas where additional knowledge transfer may be beneficial (if applicable). • Sustainability Recommendations: ○ Guidance on sustaining knowledge transfer initiatives moving forward, including ongoing training opportunities, periodic refreshers, and strategies to encourage an organizational culture of continuous learning and knowledge sharing. • Next Steps: ○ Suggested actions for the organization based on the findings of the report, including potential areas for further development, enhancement of knowledge management practices, or additional training needs. ○ Recommendations for improved effectiveness, scalability, and proficiency for supporting production environments. The Knowledge Transfer Complete Report should be presented in a clear, professional format that is easily understandable to all stakeholders, including management and end-users, and made accessible for reference in future KM initiatives. **Compliance and Standards** The Knowledge Transfer Complete Report must adhere to all applicable Government of Canada standards for project documentation and knowledge management practices. The report should comply with Protected B requirements, ensuring that sensitive or proprietary information is handled securely. Furthermore, the report should align with IITB KM Operations protocols, reflecting best practices for knowledge transfer, training, and organizational learning.
WP-05.11	ConOps	The Contractor must develop a comprehensive Concept of Operations (ConOps) document for the Knowledge Management (KM) solution. This deliverable provides a detailed description of the operational elements involved in the KM initiative, including objectives, stakeholder interactions,

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		processes, and the envisioned workflow. The ConOps serves as a foundational framework that guides the development, implementation, and management of the KM solution, ensuring alignment with organizational goals and user needs. **Key Content Requirements** The ConOps document must be presented as a PDF and must include the following elements: • Purpose and Scope: o A clear statement outlining the purpose of the KM solution and the specific scope of the ConOps document, including the intended audience and application within the organization. • Goals and Objectives: o Definition of the key goals and objectives of the KM initiative, highlighting how these contribute to the broader missions of ESDC and enhance knowledge sharing and collaboration. • Stakeholder Identification: o Identification of all relevant stakeholders involved with the KM solution, including end-users, management, IT staff, and knowledge experts, along with their roles, responsibilities, and interactions within the KM framework. • Processes and Workflows: o Documentation of the primary processes and workflows associated with the KM solution, detailing steps for: ➢ Content creation and curation ➢ Knowledge sharing and collaboration ➢ Data management and organization ➢ User engagement and support o Flowcharts or diagrams illustrating how these processes interact with each other and how information flows within the KM system. • Use Cases and Scenarios: o Description of typical use cases that demonstrate how end-users will interact with the KM solution in practice. Scenarios should illustrate various user roles, tasks, and workflows, providing a practical perspective on functionality. • Operational Environment: o Overview of the operational environment in which the KM solution will operate, including hardware, software, and integration with existing systems and tools to facilitate knowledge management.

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		○ A thorough overview of all ITSM Processes, including workflows, roles, and responsibilities, for: ➢ Request Management ➢ Incident Management ➢ Knowledge Management ➢ Problem Management ➢ Performance Management ➢ Change and Release Management ➢ Access Management • Operational Duties and Non-Standard Tasks including: ○ Patch Management, Onboarding, Offboarding, Access Management ○ Operational Reporting and Policies ○ Operations Calendar ○ Stabilization (Hypercare), all processes, and workflows developed for the stabilization period, and a plan to transition out of stabilization to regular operations for technical support and services ○ Service review and continuous improvement strategy. • A section on Monitoring, Troubleshooting, and Escalation containing: ○ Known Problems ○ Error Messages & Events Overview ○ Escalation processes ○ Backup, Recovery, and Data Retention Details, processes & scheduling ○ Maintenance Windows, Planned shutdown procedures and planned outage checklists. ○ Security and Compliance Information ○ System Controls & Processes: ➢ Batch Process ➢ Batch Monitoring • Assumptions and Constraints: ○ Identification of key assumptions that underpin the ConOps, as well as any constraints or limitations that may impact the implementation and functionality of the KM solution. • Performance Metrics: ○ Definition of success criteria and performance metrics that will be used to evaluate the effectiveness and efficiency of the KM solution post-implementation. This may include user satisfaction, knowledge retrieval rates, and engagement levels.

ID	Name	Description
		• Risk Management Considerations: ○ Documentation of potential risks associated with the KM initiative and strategies for mitigating these risks, ensuring the successful operational deployment of the solution. The ConOps document should be structured clearly and be easily accessible to all stakeholders, serving as a reference point for both current and future phases of the KM initiative. **Compliance and Standards** The ConOps must adhere to all applicable Government of Canada standards for documentation and project management. It should comply with Protected B requirements, ensuring that sensitive information is handled appropriately throughout the operational lifecycle. Additionally, the ConOps should align with IITB KM Operations protocols, reflecting best practices for knowledge management and ensuring that the KM solution is designed to be secure, accessible, and user-friendly for all stakeholders involved.
WP-05.12	Transition Out Plan and Report	The Contractor must define the transition out activities that will guarantee a successful handover to ESDC., This deliverable aims to ensure business, operational continuity and minimize disruptions. The plan will: a) Define and elaborate the business, operational and technical scope b) Identify key stakeholders, management and internal ESDC teams. c) Identify roles and responsibilities for all stakeholders d) Identify the timelines for key activities, milestones, and any deadlines. e) Inventory of resources, assets and documentation that need to be transitioned for ongoing operations and other critical functions. f) Identify potential risks for the transition out. Develop a risk mitigation plan to address these risks. g) Establish a communication strategy to inform stakeholders and management. h) Provide details on post transition support. The contractor will then produce a comprehensive Transition Out Report following the successful transition of the Knowledge Management (KM) solution from the Contractor to the ESDC team. This deliverable summarizes the transition process, evaluates its effectiveness, and provides insights and recommendations for sustaining the KM solution. The report serves as a formal record of the transition activities, knowledge transferred, and any outstanding issues that require attention.

ID	Name	Description
		The Transition Out Report should be structured clearly and presented in a professional format, ensuring readability for all stakeholders involved. It should be distributed to relevant parties to promote transparency and continuous improvement in the KM initiative. **Key Content Requirements** The Transition Out Report must include the following elements: • Executive Summary: o A concise overview of the Transition Out activities, including objectives, key findings, and the overall effectiveness of the transition process. • Transition Objectives and Scope: o A detailed description of the objectives that guided the transition, as well as the scope of the activities conducted, including systems, tools, and knowledge that were transferred. • Key Activities and Milestones: o A summary of the major activities undertaken during the transition, including: ➢ Knowledge transfer sessions conducted (e.g., training, workshops). ➢ Documentation provided to ESDC. ➢ Engagement with stakeholders and communication efforts. • Knowledge Transfer Assessment: o Evaluation of the effectiveness of the knowledge transfer process, including user feedback and measurements of comprehension and user preparedness post-transition. o Identification of knowledge gaps or areas for improvement based on user experiences and training assessments. o Document Management Structure – Develop document management structure and an evergreening process for project documentation, including: ➢ Requirements ➢ Functional design documentation ➢ Technical design documentation and decisions log ➢ Integration design documentation and decisions log ➢ Testing processes and supporting documentation ➢ Defect reports for the project and Test Automation Framework ➢ Test Automation Framework technical design documentation. ➢ Document support processes and procedures ➢ Code development processes

ID	Name	Description
		➢ Code management and merging processes ➢ Technical support processes ➢ Business support processes ➢ Technology support strategy ➢ Document infrastructure and environment management processes and procedures: ▪ Environment management processes ▪ Processes needed to support design and development in the Solution environments. ▪ Service, Application, and Hardware criticality assessment and assessment framework ▪ Service, application, and hardware downtime and proposed windows of any outages o ADO review and cleanup - document a strategy to ensure the KM project within ADO is ready for transition. o Determine which dashboards will be required to provide a view into various outstanding work item backlogs • Challenges and Lessons Learned: ▪ Analysis of challenges encountered during the transition, including any issues related to knowledge retention, user engagement, or system functionality. ▪ Documentation of lessons learned to inform future transitions, including successful strategies and practices to replicate. • Outstanding Issues and Recommendations: ▪ A list of any outstanding issues or concerns that require further attention or resolution, along with strategies for addressing these items. ▪ Recommendations for ongoing support, maintenance, and enhancement of the KM **Compliance and Standards** The Transition Out Report must comply with all applicable Government of Canada standards for documentation and project management. It should maintain adherence to Protected B requirements, ensuring that sensitive information included in the report is handled securely. Additionally, the report should align with IITB KM Operations protocols, reflecting best practices for knowledge management and supporting the organization's commitment to effective knowledge sharing and collaboration.

ID	Name	Description
WP-05.13	Post Cutover Checklist	The Contractor must develop a comprehensive Post Cutover Checklist for the Knowledge Management (KM) solution following the cutover from the previous system to the new KM platform. This checklist serves as a systematic tool to ensure that all necessary steps are completed, functionalities are confirmed, and that users are adequately supported after the transition. It guarantees that the KM solution is fully operational, secure, and ready for ongoing use in supporting knowledge sharing and management across the ESDC. The Post Cutover Checklist must be presented in a clear, organized format to facilitate ease of use for all team members involved in the cutover process. It should be incorporated into the overall project documentation and referenced in any post-cutover evaluations or reviews. **Key Content Requirements** The Post Cutover Checklist must include the following elements: • Verification of System Functionality and Operational readiness: o Confirm that all critical functionalities of the KM solution are operational, including: ➢ Access to knowledge articles and resources. ➢ Search and retrieval capabilities. ➢ Content creation and management tools. ➢ User roles and permissions are correctly assigned. ➢ System access ➢ Scheduling and shift rosters. ➢ Resolution of, or plan to resolve any post-cutover issues • User Access and Authentication: o Ensure that all users have access to the new system and that their authentication processes are functioning as expected, including: ➢ Successful login attempts for all user roles. ➢ Verification of access permissions based on user roles. • Data Integrity Checks: o Validate that all data has been accurately migrated to the new KM solution, including: ➢ Checking the completeness and accuracy of knowledge articles, metadata, and user-generated content. ➢ Performing sample checks of migrated data against original sources to confirm consistency. • Documentation Availability:

ID	Name	Description
		○ Ensure that all relevant documentation, including user manuals, training resources, and support materials, is readily available and accessible within the KM system. • Training and Support Readiness: ○ Verify that training sessions have been conducted for all end-users, including: ➢ Providing an overview of new features and functionalities. ➢ Addressing common questions and concerns. ○ Confirm the availability of helpdesk support and resources for users post-cutover. • Feedback Mechanism: ○ Establish a process for gathering user feedback regarding the new KM solution, including: ➢ A defined method for users to report issues, ask questions, or provide suggestions. ➢ Initial user satisfaction surveys to evaluate the transition experience and identify areas for improvement. • System Monitoring: ○ Confirm that monitoring tools are in place to track system performance and user engagement, helping to identify any issues or bottlenecks in real-time. • Backup and Recovery Procedures: ○ Ensure that backup protocols are configured and functional, allowing for quick data recovery in the event of unexpected issues or data loss. • Compliance Verification: ○ Check that the new KM solution complies with all relevant Government of Canada standards, including Protected B requirements and IITB KM Operations protocols. • Sign-off and Documentation: ○ Confirm that relevant stakeholders review and sign off on the completion of the cutover activities, documenting any outstanding issues that need further attention and capturing lessons learned during the process. • Communication Plan ○ Communication to users around standard post-stabilization support processes ○ Links to rollback plans in the event of a major issue ○ Link to Roles & Responsibilities and contacts for support activities (e.g.: security, networking, infrastructure) ○ Tasks regarding necessary communication to key stakeholders, including:

ID	Name	Description
		➢ Communication to users around standard post-stabilization support processes ➢ Links to rollback plans in the event of a major issue ➢ Link to Roles & Responsibilities and contacts for support activities (e.g.: security, networking, infrastructure) ➢ Tasks must be presented with a link to supporting documentation, where required, or comments detailing completion in all other cases. **Compliance and Standards** The Post Cutover Checklist must adhere to applicable Government of Canada standards for documentation and project management practices. It should also align with Protected B requirements to ensure that sensitive information is appropriately handled and secured. Additionally, the checklist must comply with IITB KM Operations protocols, reflecting best practices for knowledge management implementation and support.
WP-05.14	Post Deployment stabilization per Release	The Contractor must implement a comprehensive Post Deployment Stabilization plan for each release of the Knowledge Management (KM) solution. This deliverable ensures that the system is functioning optimally following deployment, provides support to users during the transition to the new or updated features, and addresses any issues that may arise. The goal of the stabilization process is to enhance user satisfaction and ensure the KM solution remains robust and reliable as it supports knowledge sharing and collaboration across the ESDC. The Post Deployment Stabilization plan should be structured clearly, enabling all stakeholders to understand their roles and responsibilities during the stabilization efforts. It should serve as a proactive approach to ensure that the KM solution meets user needs and operates effectively following each release **Key Content Requirements** The Post Deployment Stabilization plan must include the following elements: • Stabilization Objectives: o Clearly defined goals for the stabilization period, including ensuring system functionality, addressing user concerns, and preventing disruptions in knowledge sharing. • Duration of Stabilization: o Specification of the stabilization period following each release, including key dates and milestones for assessing system performance and user engagement. • Monitoring and Evaluation Metrics:

ID	Name	Description
		○ Establishment of metrics to evaluate the system's stability and performance post-deployment, including: ➢ User access and engagement levels. ➢ Response times and reliability of core functionalities. ➢ Frequency and severity of issues reported. • User Support and Training: ○ Implementation of dedicated support for users during the stabilization period, including: ➢ Helpdesk availability for troubleshooting and issue resolution. ➢ Access to training resources and workshops to familiarize users with new features. ➢ Ongoing communication channels (e.g., forums, FAQs) for user questions and feedback. • Issue Tracking and Resolution: ○ Development of a robust issue tracking mechanism to monitor and log any problems encountered by users post-release, including: ➢ Categorization of issues based on severity and complexity. ➢ Processes for prioritizing and addressing issues in a timely manner. • Feedback Collection: ○ Strategies for collecting user feedback during the stabilization process, such as: ➢ User satisfaction surveys and focus groups to gauge initial reactions to the new features. ➢ Regular check-ins with key stakeholders to gather insights and suggestions. • Regular Status Reports: ○ Preparation of status reports summarizing key findings, issues identified, and actions taken during the stabilization period, ensuring transparency and accountability. ○ Scheduling regular meetings with stakeholders to discuss progress and gather additional feedback. • Continuous Improvement Plan: ○ Development of a plan for ongoing improvements based on user experiences and feedback gathered during the stabilization period, including: ➢ Recommendations for future enhancements to the KM solution.

ID	Name	Description
		➢ Adjustments to training materials and user support processes based on identified needs. • Knowledge Capture: o Documentation of lessons learned during the stabilization process for future reference, including successful strategies and common challenges faced. . **Compliance and Standards** The Post Deployment Stabilization plan must adhere to applicable Government of Canada standards for software deployment and project management practices. It should be designed to comply with Protected B requirements, ensuring that sensitive information is securely managed throughout the stabilization process. Additionally, the plan should align with IITB KM Operations protocols, incorporating best practices for user support and knowledge management.

WP-06:KM Solution - Project Management and Governance

The Contractor must deliver the following project management and governance deliverables reflective of the project implementation project TA Work:

ID	Name	Description
WP06-01	Project Management Artifacts and Approach	The Contractor must prepare the various artifacts and provide support for the project management activities: • Identify the deliverable review matrix and consolidation of Deliverables and Work Products: The matrix must include all required deliverables and work products for the project. Each item should be listed with a unique identifier and name, ensuring that both in-progress and completed items are included. • Timeline for Each Deliverable: A timeline or deadline must be provided for each deliverable and work product in the matrix. The timeline should be realistic, aligned with the overall project schedule, and account for review and approval periods. • Must work with ESDC to ensure the RAIDD (Risks, Action, Issues, Decisions, Dependencies) registers are updates in ADO as well as PMIS.

ID	Name	Description
		• Provide clear and concise decks and documentation to brief senior management, stakeholders. • Provide the requirement documentation to support the governance process. • Organize and chair the meetings where ESDC is not the lead. ESDC is responsible for chairing the initial kick off meetings

WP-06.02	Project Management Plan (PMP)	A project management plan (PMP) will identify the work breakdown for all releases. The PMP should be considered the primary source for information about the project's organization, sprint schedules, controls, timelines, stakeholder engagement, and project management processes and methodologies, tools, and terminology.
		
		The PMP will be iteratively updated throughout each release because of continuous improvement, retrospectives and lessons learned.
		
		Key Content Requirements
		
		The PMP will include the following:
		• A project definition which identifies work breakdown, feature breakdown structure, sprint management plan and schedule, release plan including release schedule, deliverables, and dependencies as required.
		• A Risk, Actions, Issues, Dependency and Decision Register.
		• A high-level summary of the DevOps information (sprint plan, backlog, user stories, sequencing).
		• The technical environment and tools required.
		• A schedule management Plan
		• Project Management Processes and project controls plan including:
		  ○ A deliverables and work product review and approval process
		  ○ Risk, actions, issues, decisions, dependencies, and issues management
		  ○ Scope management
		  ○ Change control process (scope, schedule, and cost)
		  ○ Dependency management
		  ○ Project status and communications reporting plan
		  ○ Vendor Governance
		• Team structure
		• Resource Management Plan including management escalation process, onboarding and offboarding information
		• Quality Management Plan for all artefacts

ID	Name	Description
WP-06.03	Deliverable Review Matrix	The Deliverable Review Matrix (DRM) will continuously assess and track the status, quality, and acceptance of specific deliverables throughout the releases before they are finalized or approved. The Deliverable Review Matrix will be iteratively updated throughout each release. **Key Content Requirements** Each item in the DRM must: • Have a unique identifier, name, and be linked to a category and work area. • Include frequency of deliverable (if applicable, such as for Sprints), a deadline that is realistic, and aligned with the overall project schedule, accounting for translation (when applicable), review, and approval periods. • List the responsible ESDC and contractor lead.
WP-06.04	KM Initiative Schedule	The contractor must deliver an overall project schedule, along with interdependencies between the various streams of work within the project. They must consider business blackout periods and busy periods ensuring releases or training does not interrupt delivery of services to Canadians. The project schedule will be iteratively updated throughout the duration of the project. **Key Content Requirements** • The project schedule must include all releases, as there will be overlap, listing key activities, deliverables, milestones, dependencies, and dates for all activities. • The schedule must be accompanied by a Release on a Page on PowerPoint to support weekly progress reporting and exec briefings. The schedule must also be accompanied by a resource plan which includes roles and responsibilities of all resources (primary and backup Core Team, other resources to the Manager level) to complete the work including: • name and title of the resource. • location of resource and Security Clearance level • A resource plan which includes a description of the management escalation process. • A resource plan which includes a description of the training and skills acquisition approach. A resource plan which includes Onboarding and Offboarding

ID	Name	Description
WP-06.05	Executive Showcases	The Contractor must deliver Executive Showcases Quarterly (once very 4 months) to provide project leadership with a visual opportunity to reconcile progress with status reporting. **Key Activities and Content Requirements** The Contractor must conduct showcase events that will consist of: • A stakeholder focused summary of Release outcomes and update on impacts and activities coming up for stakeholders (Change Management and Training focused) • A visual opportunity and or a live demo to see the progress of design and configure phases and demonstrate system capabilities of the releases by providing a business-process focused solution demonstration for executive audience. • Develop and provide a PowerPoint presentation used in the showcase. • Record all showcases for use in other forums.
WP-06.06	Sprint Showcases	The Contractor must deliver Sprint Showcases at the end of each sprint to demonstrate progress, validate outputs and gather feedback on the development progress. **Key Activities and Content Requirements** The Contractor must conduct showcase events that will consist of: • A clear, visual presentation and/or a live demo of the outcomes achieved during the sprint. This can include charts, graphs, dashboards, or other visual aids that effectively communicate progress and accomplishments. Additionally, it is important to address any expected outcomes that were not met during the sprint. In such cases, the Contractor will identify the reasons behind the shortfall, assess any underlying issues, and develop action plans for improvement. • A demonstration of key work completed during the sprint, showing their functionality or progress and evaluate if the component meets expectations. These deliverables should align with the goals and objectives set at the beginning of the sprint. • Identifying new or updated requirements. • Highlight any lessons learned, as needed. • Develop and provide a PowerPoint presentation used in the showcase. • Record all showcases for use in other forums.

ID	Name	Description
WP-06.07	Executive Summary reports	The Contractor must deliver High level Status PowerPoint reports which includes dashboards/data from ADO, every two weeks to allow the appropriately monitoring and control of the project. **Key Content Requirements** The reports will include: • Overview: A concise overview of the project's status, highlighting key achievements, and any critical issues or risks. • Monitoring: information that allows executives to monitor the project's progress and performance against the project plan, including budget, scope, and timeline. • Metrics: essential metrics, such as progress updates, percentage completion, risk status, and financials, in a clear and digestible format for executive stakeholders. • Actionable Insights: The report should offer actionable insights, outlining any required decisions or escalations needed to keep the project on track and within scope
WP-06.08	Sprint Reports	The Contractor must develop and deliver a report which includes dashboards/data from ADO, after each sprint that aligns with the Sprint Showcase. **Key Content Requirements** The Sprint report must include the following: • Sprint Overview (Planned vs. Actual): The report must provide an overview of the sprint's progress in terms of Design, Configure, Build, Test and Deploy. It should clearly compare the planned activities against the actual outcomes, highlighting any deviations from the original plan and reasons for the differences. • Summary of Requirements and User Story Statuses: The report must include a detailed summary of all requirements and user stories, both for the current sprint and overall project. It should specify the status of each user story (e.g., in progress, completed, pending) and show the overall progress towards completion. • Functional, Technical, and Interface Design Document (FDD, TDD, IDD) Statuses: The report must provide a status update for the Functional Design Document (FDD), Technical Design Document (TDD), and Interface Design Document (IDD). This should include the completion percentages for each document and any ongoing work, both for the sprint and the overall project. • Risks, Actions, Issues, Dependencies, and Blockers: The report must include in detail any risks, issues encountered, dependencies, and blockers that affected the

ID	Name	Description
		sprint's progress. For each risk or issue, the report should include the status, impact on future sprints, and any mitigation or resolution actions taken.
WP-06.09	Weekly Status Report Summaries	The weekly Status Report Summary provides ongoing and frequent visibility on the project's progress to proactively addresses challenges that may arise and facilitate decision making. **Key Content Requirements** The Contractor must deliver a weekly Project Level status report which includes dashboards/data from ADO that includes the following: • Project Progress: The report must provide a clear update on the overall progress of the project, including, tasks completed and tasks still in progress, including decisions that require leadership action. It must track the completion of deliverables and work products against the project timeline. • Schedule Adherence: The report must indicate whether the project is on track, behind, or ahead of schedule, with specific focus on key deliverables. Any changes to the timeline, such as delays or accelerated deliverable completion, must be highlighted. • Risks, Issues, and Deliverable Impacts: The report must summarize identified risks and issues, noting any potential or current impact on deliverables. It should include the status of each risk or issue, its effect on the schedule or deliverables, and the mitigation actions being taken. • Report on Burn Down for Budget, Resources, and Deliverables: The report must include a burn down section showing the remaining budget, resource utilization, and deliverable completion. It should highlight any variance between actual and projected expenditures, resource availability vs. usage, and the progress of deliverables over time. Deliverables that are at risk due to resource constraints or budget issues must be flagged for attention.
WP-06.10	Ongoing Project Management Activities	Once WP-01 – 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 from WP-01, and to address new insights and feedback that arise, the contractor must take appropriate action and provide necessary updates accordingly. This includes: • Identify and create User Stories not defined in WP-01, from functionalities that emerge during execution;

ID	Name	Description
		• In collaboration with ESDC, update existing User Stories defined in WP-01 or create new User Stories based on information gathered throughout development, testing and usage of the solution; • Regularly review User Stories defined in WP 01, updating them based on new information as needed; and 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. Additionally, upon completion of WP-01, the contractor must: • In collaboration with ESDC, when applicable, update existing documents, architectures, strategies, and frameworks to ensure they remain current; and • Review these same artifacts quarterly to ensure their completeness
WP-06.11	Governance Model and Delivery Approaches	The Contractor must use their expertise and recommend industry best practices to assist ESDC in finalizing its proposed Governance Model and Project Delivery approaches as listed below. **Key Content Requirements** For each deliverable referenced below, and as listed in Appendix H, ESDC will provide a recommended approach for the Contractor to review, enhance by incorporating their expertise, and finalize accordingly. • Governance Model. The Contractor must provide documented feedback on: o ESDC's proposed governance model. o The Terms of Reference for each of the proposed governance committees. o Supporting documentation (Reports/Decks) that ESDC will prepare for various committees/approvals. o The implementation of the proposed Governance RASCI. o A RASCI outlining the teams including specific responsibilities and key deliverables. • Delivery Approach – Team structures. The Contractor must provide documented feedback on the proposed Delivery Approach Team Structures and provide feedback for its implementation. The Contractor must also deliver the following: o Deck with the various teams' structures.

ID	Name	Description
		○ Document describing in detail the team structures, leadership (solution train), Product group (core team and client), Enabler Group (other stakeholders). ○ A RASCI outlining the teams including specific responsibilities and key deliverables. • Delivery Approach – Planned phases/releases. The Contractor must provide documented feedback on: ○ The implementation of the proposed delivery approach for Planned phases/releases. ○ Various phases for the projects and outcomes for each phase. • Delivery Approach – ADO structure. The Contractor must provide documented feedback on: ○ The implementation of the proposed delivery approach for the ADO structure. ○ An Azure DevOps (ADO) structure including templates for each work item in support of project management. ○ Weekly Report of issues, tasks entered in ADO. • Delivery Approach – Ways of working. The Contractor must provide documented feedback on: ○ The implementation of the proposed delivery approach for Ways of Working ○ Final documented ways of working/ConOps. • Release Management approach. The Contractor must deliver the following documented information: ○ Release process preparation and high-level roadmap. ○ Release types ○ Release readiness ○ Org and People readiness ○ Release execution – cutover plan • Clear explanation of the circumstances and justification for the proposed adjustment.
WP-06.12	Deployment Strategy and Roadmap	In preparation for the release management WP (WP-05), the contractor must frame a deployment strategy and roadmap. The deployment strategy and roadmap will be iteratively updated throughout the duration of the project. **Key Content Requirements** The Contractor must include the following:

ID	Name	Description

		• An overview of the deployment scope including assumptions, guiding principles and contractors.
		• Sequence the progression from one environment with the acceptable approvals.
		• Define and implement the deployment between the KM solution, AI capabilities, and the data migrations to avoid any conflicts.
		• Develop the deployment setup and maintenance.
		• Define how the Contractor will conduct any dry runs or dress rehearsals that are required for the releases to validate that the cutover plan/steps are complete and ready for execution.
		• List of activities (cutover spreadsheet) that are required to complete an E2E deployment of the KM solution, AI capabilities, and the data migration in Production. Each activity will have the below associated fields:
		  ○ Owner
		  ○ Start Date, Completion Date and Duration
		  ○ Dependencies (if applicable)
		  ○ Validations (exit criteria of different phases of the Cutover to ensure each phase is completed successfully)
		  ○ Link to repos, pipelines, and artifacts (if applicable)
		• List of owners of activities in the Cutover spreadsheet and their contact information (name, email address, and phone number)
		• Environment Shakedown test suite to validate the health of the environment post-deployments
		• Roll-Back playbooks outlining the steps that need to be followed to revert to last working version for different areas/components of the Solution (including data) should the shakedown process uncover issues
		• Defines a contingency plan that will be followed if a deployment release cannot proceed
		• Hyper Care model description
		• Process for oversight, management and escalation of deployment and cutover issues
		
		The contactor must also provide a cutover readiness checklist to confirm that all requirements for the execution of the Cutover plan have been met. This includes:
		
		Identification of owners of deployment activities
		• Confirmation of availability of team members
		• Creation of Active Directory (AD) group
		• Production infrastructure already deployed

ID	Name	Description
		• ATO (Authority to Operate), CAB (Change Advisory Board) Approval, Acceptance Report, Approval to Deploy The activities table will have the below fields: • Activity Description • Primary Owner • Completion Date • Outcome of completion (ex: AD group has been created)
WP-06.13	Environment Management Strategy and Plan	The Contractor must develop an Environment Management Strategy and Plan based on the approved environment strategy. Note that ESDC must approve as available all tools referenced in the deliverable or approve the timeline for their availability. Any referenced changes to architecture will have to be approved by the EARB. **Key Content Requirements** The Environmental Management Strategy and Plan must include: • A definition of environments and their components that aligns with the approved environment strategy. • A configuration management strategy and plan (i.e., which releases or builds and how they will be progressed through the environments - Dev, Test, Training, etc.). • A process of how and which builds in which environment will be tracked, managed, and communicated. • A list of all the integration points for every Environment (e.g. Interop, legacy, Cúram, etc.) • A description of how test data will be used and refreshed in the Environments. • Safeguards to ensure environments do not get refreshed accidently or incorrectly. • A plan to enable the required support for monitoring and management of the Solution and associated infrastructure. • Application Programming Interfaces (API) and contracts with ESDC Interoperability Platform to support interfaces. The document must inventory the types of in-scope applications and infrastructure, including API endpoints.

ID	Name	Description
		The Contractor must outline specific requirements that govern the scope and development of the Test Environment Monitoring Management Plan, including: • A definition of environments and their components and support for all testing types. • A configuration management plan (i.e., what, how loads will be progressed through the test environments). • A process of how which builds in which environment will be tracked, managed, and communicated. • How test data will be used and refreshed in the environments. • Safeguards to ensure test environments do not get refreshed accidently or incorrectly.

WP-06.14	Code Promotion Strategy and Management	The Code Promotion Strategy and Management document will guide Development and DevSecOPs teams as to the processes used to promote code within the project.
		
		Key Content Requirements
		
		The Contractor must detail the following key aspects that will be used to promote code:
		
		• The required tools to enable the promotion across the planned environments.
		• The respective gates that will exist as code is being promoted.
		• Code Management including:
		  ○ Code check-in
		  ○ Tagging
		  ○ Merge strategy
		  ○ Code acceptance
		  ○ Change commit
		  ○ Conflict resolution
		  ○ Design, document, and implement repository configuration including branching patterns and backout strategies
		• Scheduling, including:
		  ○ An integration builder that runs each time a developer checks in code.
		  ○ A nightly builder that runs each night, builds all check-ins from all developers that day and deploys them to a nightly environment for Dev and Test.

ID	Name	Description
WP-06.15	Operational Security Procedures	The Contractor must develop operational security procedures following Government of Canada and industry security standards. **Key Content Requirements** The operational security procedures must: • Explicitly define the authorization boundary for the KM solution. • Describe relationships with or connections to other external information systems. • Provide an overview of the security controls for the KM solution. • Describe the rationale for security controls including the tailoring and supplementation decisions. • Include a component diagram that clearly shows the KM solution architecture, the allocation of Service components to security zones, and security-related data flows. • Include documentation of any gaps where security controls could not be applied in the design of the solution in adherence to its security control profile (example, PBMM), due to (as example) capability limitations of the solution, and describe any mitigating controls introduced as a mitigation strategy to reduce the risk where initial controls could not be implemented. Additionally, the document must also include: • Reporting schedule and procedures. • Access control. • Authorization boundary for the Service. • Audit and accountability. • Identification and authentication. • System and communications protection. • Awareness and training. • Configuration Management. • Contingency planning. • Incident management. • Maintenance. • Personnel security; and • System and information integrity.
WP-06.16	System Security Strategy	The Contractor must deliver a system security strategy applicable to the configuration of the KM Solution. This strategy includes various components including System Security and Incident Response Plans, and a Security Control Traceability Matrix to ensure that all

ID	Name	Description
		security controls (e.g., technical, administrative, and physical) are adequately addressed throughout the system development lifecycle. As well, to demonstrate that the controls are in place and working as intended, the Contractor must provide evidence in the form of documentation, data, or other artifacts. This evidence is used to verify compliance with security standards, policies, and regulations, and it is typically required during security assessments, audits, or compliance checks. **Key Content Requirements** The Contractor must deliver a System Security Plan that: • Aligns with the Security Obligations as defined in the requirements. • Is consistent with the solution architecture. • Explicitly defines the authorization boundary for the Service. • Describes relationships with or connections to other external information systems. • Provides an overview of the security controls for the Service. • Describes the rationale for security controls including the tailoring and supplementation decisions; and • includes a component diagram that clearly shows the Services architecture, the allocation of Service components to security zones, and security-related data flows The Contractor must deliver a Security Incident Response Plan based on configuration, development and operational support that includes: • How the Contractor plans to identify, report, and escalate Security Incidents, including developing and distributing communications to the department. • A roadmap for implementing the Security Incident response capability that includes preparation, detection, analysis, containment, and recovery. • A description of the structure, organization of the Security Incident response capability. • A definition of metrics for measuring the Security Incident response capability. • A high-level approach for how the Security Incident response capability fits into the overall organization. • A definition of reportable Security Incidents. • A definition of the escalation timelines. • A definition of resources and management support needed to effectively maintain and support.

ID	Name	Description
		The Contractor must deliver a Security Control Traceability Matrix (SCTM) that includes: • Control Requirements: The specific security requirements that the system must meet. • Security Controls: The measures or safeguards implemented to meet the security requirements. • Mappings: Links between security requirements and the corresponding controls that fulfill them. • Test Methods: How each control will be verified or tested. • Status/Traceability: Indicates whether a control has been implemented, tested, and verified. The Contractor must provide Security Control Evidence to prove compliance with security standards, policies, and regulations, and it is typically required during security assessments, audits, or compliance checks. Evidentiary documents include: • Policies and Procedures: Written documents outlining security protocols, such as an organization's access control policy or incident response plan. • System Configurations: Screenshots, configuration files, or system logs that show a control (e.g., encryption, firewall settings) is correctly implemented. • Audit Logs: Records of system activity that demonstrate monitoring and logging controls are in place. • Test Results: Reports from vulnerability assessments, penetration tests, or other security testing methods that validate control effectiveness. • Training Records: Documentation showing that employees have completed required security training. • Access Control Lists (ACLs): Evidence that shows who has access to certain systems or data and how permissions are enforced.