

RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:
Bid Receiving - PWGSC / Réception des soumissions -
TPSGC
Place du Portage, Phase III
Core 0A1/Noyau 0A1
11 Laurier St./11, rue Laurier
Gatineau
Québec
K1A 0S5
Bid Fax: (819) 997-9776

SOLICITATION AMENDMENT
MODIFICATION DE L'INVITATION

The referenced document is hereby revised; unless otherwise indicated, all other terms and conditions of the Solicitation remain the same.

Ce document est par la présente révisé; sauf indication contraire, les modalités de l'invitation demeurent les mêmes.

Comments - Commentaires

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

Issuing Office - Bureau de distribution
Shared Systems Division (XL)/Division des systèmes
partagés (XL)
4C1, Place du Portage Phase III
11 Laurier St./11, rue Laurier
Gatineau
Québec
K1A 0S5

Title - Sujet Case Management Software Solution	
Solicitation No. - N° de l'invitation EN578-130092/B	Amendment No. - N° modif. 002
Client Reference No. - N° de référence du client 20130092	Date 2013-04-12
GETS Reference No. - N° de référence de SEAG PW-\$\$XL-123-25647	
File No. - N° de dossier 123xl.EN578-130092	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2013-05-15	
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Jalbert, Denise	Buyer Id - Id de l'acheteur 123xl
Telephone No. - N° de téléphone (819) 956-1083 ()	FAX No. - N° de FAX (819) 953-3703
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction:	

Instructions: See Herein

Instructions: Voir aux présentes

Delivery Required - Livraison exigée	Delivery Offered - Livraison proposée
Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Telephone No. - N° de téléphone Facsimile No. - N° de télécopieur	
Name and title of person authorized to sign on behalf of Vendor/Firm (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)	
Signature	Date

The amendment 002 is issued to:

- (a) provide answers to questions raised by the Industry;
- (b) modify Annex C - Statement of Requirements; and,
- (c) extend the bid closing date from April 30, 2013 to May 15, 2013.

MODIFICATION # 001

M-6.25 - The CMSS must deliver, enable and support the functionality for a user to access and edit multiple cases concurrently."

MODIFICATION # 002

The bid solicitation is hereby amended to include the following Mandatory Requirement in Section M-6 of Annex C - Statement of Requirements:

M-6.26 - The CMSS must deliver, enable and support the functionality to allow a user to "follow" or subscribe to notifications and alerts to monitor and track a specific case.

QUESTIONS AND ANSWERS

Question 044

Reference: Annex C - Section R-8: Mobile Access and Applications and Collaborative Technologies

Question: The Crown should consider mobile as a mandatory requirement with a significantly higher point basis as well. Mobile is not a nice to have, but a must have. Any modern application without a mobile capability across any HTML 5 device will inadvertently constrain the Crown to solutions that have been developed in the previous century and decade. Please consider making mobile a mandatory with a points value at a minimum level of 100 points. The points can be found within the overwhelming bias to contracting resources rated at 200 points. The cost impact of subsequent modernization efforts of applications that are not natively mobile will significantly increase systems integration costs and exacerbate the use of 'body shop' resources and result in a counterintuitive solution that raises costs vs. lowering and modernizing the application environment.

Answer: Canada has reviewed the request and the requirement remains the same.

Question 045

Reference: Appendix 1 – Management Bid Evaluation Criteria, Section 4 - Professional Services Availability:

Question: Requirement # 12 indicates that points will be awarded "... for every authorized supplier...". This implies the Crown's expectation is only the Software Publisher of the Case Management Software, with a network of authorized professional services suppliers, will be submitting a response to this solicitation. Please confirm if this is the Crown's expectation.

Answer: This assumption made is inaccurate. The bid solicitation is not limited to bid response from software publishers of the proposed software products.

Question 046

Reference: Terms and Conditions, Part 1, Article 1.2 - Summary

Question: Would Canada reconsider the requirements as noted for professional services? It is of benefit to Canada to have a consistent and repeatable implementation for multiple departments and agencies rather than an approach that opens this up to firms that do not have the highly skilled resources and expertise required to have a successful implementation. It is of benefit to Canada to use other procurement vehicles on occasion to supplement resources - however, we believe, as do our many customers who have successful implementations that a consistent approach with the right expertise will provide the best result of implementation to Canada. We believe that a consistent services approach for the winning bidder (consortium) is critical so that it does not delay implementation and adoption.

Answer: Canada has reviewed the request and the requirement remains the same.

Question 047

Reference: Terms and Conditions, Part 7, Article 7.24 states: "Training and professional services will be required to install the Case Management Software Solution, as described in 7.24 - Professional Services, within Canada's designated technical environments. Professional services to be requested under task authorizations will be limited to installing the Licensed Software into two or more distinct environments (in accordance with approved Installation Plan by Canada) for the purpose of creating a functioning development environment."

Question: Can the development environment be provided as Software as a Service if it meets the functional and security requirements in the bid solicitation?

Answer: No, a development environment provided as "Software as a Service" will not meet the mandatory requirements of this bid solicitation and will be deemed non responsive. The proposed Case Management Software Solution will be deployed on on Canada's technical architectures.

Question 048

Reference: Terms and Conditions, Part 7, Article 7.24 - Professional Services

Question: With respect to this RFP, would you please confirm that professional services (installation & configuration) can be done remotely and does not have to be done onsite?

Answer: The bidder must provide personnel on-site for installation and configuration of the proposed solution. Remote installation and configuration services will not be considered compliant.

Question 049

Reference: Annex C - Statement of Requirements - Mandatory Requirement M-1.4

Question: Mandatory requirement M-1.4 states that the solution must support 250 individual users per business Unit (3000 maximum users). Based on this requirement, we believe that all references projects must meet this minimum to ensure the CMSS does not fail to meet Canada's requirement. In order to reduce Canada's risk we recommend the following changes to Section 1.1 (iii): To qualify, the reference project must (a) be currently in production for at least one year prior to the closing date of the bid solicitation, (b) have deployed at least 3 of the required functions from the list below, and (c) have two references with a minimum of 250 active users and one reference of a minimum of 3000 active users:

- Customer and stakeholder management;
- Case Management;
- Event Management;
- Document Management;
- Dashboards and Analytic;
- Reporting; and,
- Resource Management

Answer: Canada has reviewed the request and the requirement remains the same. The evaluation criteria for each reference project are within Form 2 - Reference Project (Product(s)) Evaluation Criteria.

Question 050

Reference: Appendix 1 - Management Bid Evaluation Criteria

Question: Section 2, criteria # 3 states that the bid must include references which include at least 3 key function areas. It appears it is acceptable that the CMSS reference does not need to include the Case Management Function. Therefore a bidder could get full points for a project which does not include Case Management. This seems to significantly increase the risk to Canada as well as does not fairly assess bidders offering a true Case Management System. We recommend that the Case Management function is mandatory for all reference projects.

Answer: Canada has reviewed the request and the requirement remains the same. Within Form 2 - Reference Project (Product(s)) Evaluation Criteria, Canada has established criteria that take into account the requirements.

Question 051

Reference: Article 4.7 - Usability Testing and Appendix 2 - Usability Testing Evaluation Criteria

Question: Usability Testing Scenarios indicate that the bidder will be provided with all the data necessary, when will this be available?

Answer: The necessary data for the Usability Testing will be provided at the time of the notification that the bidder has been informed of its participation to the Usability Testing.

Question 052

Reference: Article 4.7 - Usability Testing and Appendix 2 - Usability Testing Evaluation Criteria

Question: Please provide skill sets of the users that are going to be conducting the usability testing? Will the users be Case Management Users or IT personnel? This will affect the language, format and terms used in the documentation and training video.

Answer: Canada Testers will include novice and experienced users.

Question 053

Reference: Article 4.7 - Usability Testing and Appendix 2 - Usability Testing Evaluation Criteria

Question: To ensure a fair test, please confirm each Testers experience in any of the following software Solutions: (a) MS Outlook; (b) MS Office; (c) MS Dynamics; (d) WordPerfect; (e) Siebel CRM; (f) Salesforce.com; (g) SAP; (h) PeopleSoft; (i) Adobe Flash; (j) Cognos; (k) Lotus Notes; (l) GroupWise.

Answer: Canada Testers are experienced in at least one of the above mentioned software products.

Question 054

Reference: Appendix 2 - Usability Testing Evaluation Criteria, Section 1.1

Question: Please confirm that the Bidder's Testing Package is to be in both English and French?

Answer: The Bidder may deliver their training video and desk guide in either or both languages, at their discretion.

Question 055

Reference: Appendix 2 - Usability Testing Evaluation Criteria, Scenario 5 (Task 1) Step 5 of Task 1 states : "The Tester is able to toggle between French and English while entering the case profile information."

Question: This is not a mandatory or rated requirement – Will Canada consider removing this from the usability testing requirements?

Answer: The requirement remains the same. Mandatory Requirement M-1.12 states: "The CMSS must work and interoperate as a secure web browser-based solution that provides users the ability to: (a) work in English and French in its components; and (b) switch from English to French and vise-versa".

Question 056

Reference: Annex C - Statement of Requirements - Section 2.1 (Glossary) states: "Multi-tenant architecture is defined as one that is capable of supporting multiple business units through a single n-tier software installation, while each business unit having their own physical database or virtual database."

Question: Concerning Multi-tenancy environment/architecture -- If a solution is J2EE based and would require a unique cluster instance for each Business Unit configuration. We would have a 'base configuration' template that would be installed once, but for each Business Unit configuration it would script the creation and deployment of a specific instance based on the

template for the Business Unit to configure going-forward. Will this be an acceptable approach for the crown as multi-tenant.

Answer: No, it is not an acceptable approach and will render the bidder's bid response non-responsive.

Question 057

Reference: Annex C - Statement of Requirements - Mandatory Requirement M-1.4 (d) states: "Encryption: one of the tenants require the use of an encrypted database."

Question: Is this a fully encrypted database or encryption and protection of certain data fields such as Healthcare ID #, Tax ID #, etc?

Answer: The requirement is for fully encrypted database.

Question 058

Reference: Annex C - Statement of Requirements - Rated Requirement R-1.10

Question: Concerning the required signature: Do the signatures need to be original, "wet," signatures, or can documents be electronically signed with signature images?

Answer: Canada's requirement and evaluation criteria related to "signature" are outlined in Rated Requirement R-1.10.

Question 059

Reference:

Annex C - Statement of Requirements; and,
Terms and Conditions - Part 3 - Bid Preparation Instructions.

Question: How would the crown like us to respond to Annex C - Statement of Requirements? Add a column for our answers, insert our answers under each requirement, or in a separate document? Do you require responses to each individual requirement listed?

Answer: Bidders should refer to Part 3 - Bid Preparation Instructions. Bidders must be aware that they must address each requirement and provide the technical documentation, where applicable, to validate that they meet each requirement. Bidders may add a column in order to provide the answers, or insert answers under each requirement as they see fit.

Bidders must be aware that simply stating "Compliant or Responsive", "Fully Compliant or Fully Responsive" or just repeating the requirement will not necessarily constitute meeting a

mandatory or a rated requirement. In its response, the Bidder must demonstrate its understanding of the requirement and must describe how the proposed Software meets the requirement. Where Canada determines that the substantiation related to a mandatory requirement is not complete, the bid will be considered non-responsive and will be disqualified.

Links to websites are not acceptable and if provided to validate a mandatory requirement, it will render the bid response non responsive.

Question 060

Reference: Annex C - Statement of Requirements, Mandatory Requirement M-1.9

Question: The solution resulting from the Enterprise E-mail Bid Solicitation has not yet been selected and awarded, please confirm that MS Outlook is the only acceptable e-mail client.

Answer: Confirmed.

Question 061

Reference: Annex C - Statement of Requirements

Question: Modern case management solutions support all channels in one console. Integration of cases, leads, contacts with social channels including live chat, web, e-mail, phone, and for example; Facebook and Twitter are integral to a CMS. Constituents are using these channels currently to communicate to the Crown and communities. We are asking the Crown to include this as a mandatory requirement. Additionally, although the Crown has attributed some value to social and collaborative technologies, the point value is very low in relation to its' significance. Would the Crown please consider modifying the point value to attribute a higher percentage of points to social, mobile and collaborative technologies to ensure that the selected CMSS is built for present day and future communication channels.

Answer: Canada has reviewed the request and the requirement remains the same.

Question 062

Reference: Annex C - Statement of Requirements - Section 1.4 (Solution Architecture) states: "The CMSS will utilize Web interfaces for users and customers and stakeholders and will incorporate the use of mobile and remote access technologies."

Question: Mobile is a critical requirement for any modern case management solution. We are in agreement that there is an advantage to the Crown to ensure that mobile support is available natively within the solution. However, the point value attributed to requirements for

social, mobile and collaboration is quite low in relation to the significance. Can the Crown please consider modifying these requirements to attribute a greater point value to solutions that have native mobile support built in to their CMS?

Answer: Canada has reviewed the request and the requirement remains the same.

Question 063

Reference: Annex C - Statement of Requirements - Section R-8 Mobile Access and Applications and Collaborative Technologie

Question: We have noted that the Crown has not listed any requirements to allow for the ability for users to collaborate outside the call centre and leverage Subject Matter Experts that may not be a CMS user. Modern Case Management Solutions allow users the ability to collaborate and leverage expertise outside their four walls. Would the Crown consider modifying the requirements so that the solution will allow for employee engagement and enable this collaborative approach to case management so that problems are resolved in a more timely and efficient manner.

Answer: Canada has reviewed the request and the requirement remains the same.

Question 064

Reference: Annex C - Statement of Requirements - Section R-8, Mobile Access and Applications and Collaborative Technologies

Question: We have noted that there is a lack of requirements for an integrated CMS console in this bid solicitation. Has the Crown considered how agents will manage multiple cases at one time as well as handling multiple phone, e-mail and social inputs? Can the Crown consider modifying the requirements to contemplate the agents' ability to manage multiple cases at once (multi-task) ?

Answer: Canada has reviewed the request and the bid solicitation has been amended as per Modifications 1 and 2, above.

Question no. 065

Reference: Terms and Conditions, Part 3 - Bid Preparation, Article 3.2
Section I: Technical Bid -- Sub-paragraph (b) (iii) states: "The Bidder must provide technical documentation such as user manuals, screenshots, design or system management documents (or other information sources) to support the Bidder's response to each requirement must be provided."

Question: Given that some of the requirements are complex (e.g. two-factor authentication with MyKey) and can be implemented in different methods, and that several vendors provide their latest documentation and support manuals online, would the Crown accept links to publically available information?

Answer: No. Links to websites are not acceptable and if provided to a mandatory requirement, it will render the bid non-responsive.

Question 066

Reference: Annex C – Statement of Requirements, Section 1.2 – Objectives and Goals, subparagraph 3 states "...The implementation of the Case Management Software Solution should provide document management functional capabilities while allowing the repository in which documents are stored to be GC standard repositories for all documents and media (i.e. GCDocs, RDIMS)."

Question: Would the Crown confirm that its' expectation is that the "functional requirements" such as those listed in Annex C, Section 3 CMSS Mandatory Requirements M-8.1 through M-8.9 will be delivered through the document and media handling component provided by the CMSS which will house the documents and media for a duration of time and then will subsequently be stored in GCDocs?

Answer: The assumption made is inaccurate. The CMSS must be capable of storing documents and media in real time in the repository required by Business Units. The repository may be the CMSS solution, GCDocs or other GC standard EDRMS, at Canada sole discretion.

Question 067

Reference: Appendix 2 – Usability Testing Evaluation Criteria, Scenario 4 – Create a Workflow

Question: It seems that a single business end-user will determine what tasks and processes that their manager and an investigator will perform. Given this unusual proposition, would the Crown please revise this scenario to reflect a pre-configured workflow that is enforcing the business rules and evaluating the end-user's ability to achieve the desired outcome?

Answer: No. Canada has reviewed the request and the requirement remains the same. The objective of the test is to assess the ease with which a user can create a workflow within the proposed CMSS.

Question 068

Reference: Appendix 2 – Usability Testing Evaluation Criteria, Scenario 8 – Manage Documents

Question: Would the Crown please add alternative methods (such as in Scenario 1) for attaching files?

Answer: The test does not restrict the method that can be used. Points are awarded if the desired methods are used as described in the scenario.

Question 069

Reference: Terms and Conditions - Part 3, Article 3.3 (b) states: “The Bid must include a description of one project where the proposed case management software products have been deployed to a minimum of 100 active users and include at least 3 of the following key functions: a) customer and stakeholder management; b) case management; c) event management; d) document management; e) dashboards & analytic; f) reporting; and g) resource management. The software products must be in use, in the production environment, for at least one year prior to the closing date of this bid solicitation. The Bidder should include up to three relevant reference projects. Canada will rate these reference projects in accordance with Form 2 - Reference Project (Product(s)) Evaluation Criteria.

Question: Can bidders use three large project references from the private sector to meet the requirement?

Answer: Yes, reference(s) from the private sector could be used to meet the mandatory requirement. Bidders must be aware that each project will be assessed against Form 2 - Reference Project (Product(s)) Evaluation Criteria. It is the bidders' responsibility to determine which projects to submit in the bid response. There are points allocated toward public sector reference project(s).

Question 070

Reference: Terms and Conditions - Article 7.19 - Maintenance and Support Services

Question: Please confirm that Support Services will only be accessed by authorized Government of Canada's technical resources after the initial trouble (ticket) has been triaged through its own GoC Help Desk.

Answer: Confirmed. Support calls to the Contractor will be initiated from a central office, per installation. There must be a minimum of five authorized Users that are allowed to contact the Contractor per installation.

Question 071

Reference: Part 7 -- Resulting Contract Clauses - Article 7.1 (b)

Question: Canada has identified two initial clients - Industry Canada and Public Works and Government Services Canada. Would Canada also identify the 10 independent and non-related business units (tenants)?

Answer: No. The quantities listed in Article 7.1 (e) have been provided in order to allow Canada to evaluate the Bidder's proposed Installation Plan.

Question 072

Reference: Annex C - Statement of Requirements states: "...all business units will be hosted on multi-tenant instances with appropriate segregation of access, security, user profiles and data. Individual business unit data will be secure and private within that specific department or agency."

Question: Are multiple instances acceptable or is a single instance mandatory?

Answer: A single instance must support multiple tenants.

Question 073

Reference: Annex C - Statement of Requirements

Question: Would Canada provide the name of the tenant that requires an encrypted database?

Answer: No. The requirement is not limited to one tenant.

Question 074

Reference: Bid Closing Date

Question: Given the scope of the RFP, would Canada consider an extension of the RFP due date to May 10th, 2013?

Answer: The bid solicitation is hereby extended from April 30, 2013 to May 15, 2013.

Question 075

Reference: Bid Closing Date

Solicitation No. - N° de l'invitation

EN578-130092/B

Client Ref. No. - N° de réf. du client

20130092

Amd. No. - N° de la modif.

002

File No. - N° du dossier

123xIEN578-130092

Buyer ID - Id de l'acheteur

123x1

CCC No./N° CCC - FMS No/ N° VME

Question: With regard to the complexity and volume of material to be assembled for a proposal, would the Crown extend the RFP submission date to May 14?

Answer: The bid solicitation is hereby extended from April 30, 2013 to May 15, 2013.

Question 076

Reference: Terms and Condition, Part 4 - Article 4.4 (e) - Consideration of Additional Software Use of Terms

Question: Would the Department of Public Works and Government Services Canada (PWGSC) allow bidders to respond based on the terms and conditions of existing Supply Arrangements between PWGSC and the Suppliers rather than the terms and conditions of this bid solicitation for a Case Management Software Solution." Please confirm this is acceptable.

Answer: No. This is not acceptable and will render the response non-responsive.

Question 077

Reference: Terms and Conditions - Article 7.4 - Standard Clauses and Conditions

Question: In Section 7.4 Standard Clauses and Conditions, the link to the SACC Manual appears not to work. Can PWGSC please provide PDF versions of the SACC manual to all vendors via MERX.

Answer: The Manual is available to all vendors via Buy and Sell Website:
<https://buyandsell.gc.ca>

Question 078

Reference: Article 5.4 - Bidder Certifies that all Software is "Off-the-Shelf"

Question: In Article 5.4, as the bidder must certify that "All Software" is "Off-the-Shelf", please confirm that the proposed CMSS solution shall include all core modules to meet the Mandatory and Rated requirements as well as all fully compatible extensions/ third party software required to meet all of Canada's variety of programs and services outlined in Part 1 – General Information paragraph 1.2.

Answer: The proposed Case Management Software Solution must deliver the functionalities in accordance with Annex C - Statement of Requirements.

Question 079

Reference: Terms and Conditions, Part 1, Article 1.2 - Summary

Question: Please confirm that the proposed CMSS must include all extensions and shall meet the following functional areas at the time of bidding: (a) Contacts & Grants Management, (b) Courts/ Judicial Management, (c) Compliance Management, (d) Entitlement Case Management, (e) Client Service and (f) Investigations. No additional software modules, extensions and/or third party software can be added to the CMSS solution after the bid closes or after contract award

Answer: No. The proposed Case Management Software Solution must deliver the functionalities in accordance with Annex C - Statement of Requirements.

Question 080

Reference: Part 7 - Resulting Contract Clauses, Article 7.18 - License to use the Licensed Software

Question: Please define "Canadian French" - providing a detailed differentiation to "French" to ensure vendors remain compliant.

Answer: The Licensed Software must allow "Users" to work in Canadian French as opposed to Parisian French or other.

Question 081

Reference: Summary of Rated Points for Management Bid

Question: How will the points for the references be calculated? The Evaluation Summary and Section 2 of Appendix 1 indicates a score out of 60 for each category of references yet Forms 2 and 3 each show a score of 100 points. Please clarify

Answer: The Bidders' scores will be prorated against the maximum points stated in Appendix 1 - Management Bid Evaluation Criteria.

Question 082

Reference: Terms and Conditions, Part 3, Article 3.3 (c) - Description of Qualifications of Proposed Professional Services Resources

Question: Based on this requirement Canada is requesting 15 CVs. Please explain how

the CVs for the Professional Services Resources are to be presented and how they will be assessed. Further, as this is a significant number of CVs to be presented, how does this figure in the evaluation scoring?

Answer: The curriculum vitae must demonstrate that the Bidder has a pool of qualified individuals that have the qualifications and the demonstrated experience to deliver the Work described in Part 7, Article 7.24 - Professional Services.

Question 083

Reference: Bid Closing Date

Question: In light of the extensive requirements, anticipated question and answer process and important nature of this RFP, we respectfully request a four week extension in order to prepare a response of suitable quality.

Answer: The bid solicitation is hereby extended from April 30, 2013 to May 15, 2013.

Question 084

Reference: Bid Closing Date

Question: Due to the detail required by the Crown to deliver an acceptable response, please extend the Close Date until 15 May 2013.

Answer: The bid solicitation is hereby extended from April 30, 2013 to May 15, 2013.

Question 085

Reference: Bid Closing Date

Question: We respectfully request an extension to the close date of this RFP by 2 weeks.

Answer: The bid solicitation is hereby extended from April 30, 2013 to May 15, 2013.

ALL OTHER TERMS AND CONDITIONS REMAIN THE SAME