

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. 009
Client Reference No. - N° de référence du client 20130092	Date 2013-05-14
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 2013-05-23	
Time Zone Fuseau horaire Eastern Daylight Saving Time EDT	
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 bid solicitation amendment # 009 is issued to provide answers to questions raised by the Industry.

QUESTIONS AND ANSWERS

Question 220

Reference: Bid Solicitation Amendment # 008

Question: Regarding Amendment #8, changes in Mandatory requirements at this late date, (7 days from the 15 May close date) likely has caused bidders to re-evaluate their bid/ no-bid decisions. Also due to the laborious document submission requirement, many bidders have already completed their submissions. To remain compliant or to reconsider their bid response, an extension of an additional week is not sufficient; we request you cancel this procurement and retender.

Answer: The change to the bid solicitation has not modified the potential responsiveness of an existing bid. It is the responsibility of a Bidder to request clarifications early in the bid solicitation process in order to make their business decisions. Canada will not cancel the bid solicitation.

Question 221

Reference: Regarding Amendment #8, Question 193

Question: With due respect, we also feel that PWGSC did not engage industry as much as possible which has resulted in over 200 clarification questions. Questions have been asked repeatedly by multiple bidders throughout the RFI stages and again during the bid solicitation. The Crown did engage the community with an LOI and RFI, little or none of content from the best in class case management software providers to world class service delivery organizations was incorporated in the final bid solicitation. If Canada is interested in industry feedback why have they not taken into account the numerous suggestions and requests in the LOI, RFP and questions regarding this bid solicitation? One example is the requirement around "Mobility". Based on their experience, a number of vendors have submitted inquiries and requests suggesting that Mobility become a mandatory requirement or have a significantly increase point rating. The crown has chosen ignore vendors experience and state "Canada has reviewed the request and the requirement remains the same."

Answer: Canada has reviewed each request and has ensured that any modification did not reduce the competitive nature of the bid solicitation. The requirement described in the bid solicitation is for a flexible and configurable COTS platform from which Canada can quickly configure and deliver numerous business unit solutions, originating from various areas.

Question 222

Reference: Questions and Answers #026, #027, #028, #115, #149, #193

Question: Questions have been asked repeatedly by multiple bidders throughout the RFI stages and again during the RFP Clarification for a clearer definition of the detailed business requirements for the minimum 6 business management functions, namely 1) "Contracts and Grants Management (outreach, application, eligibility, administration, management, audit and evaluation, monitoring and reporting); 2) Courts/Judicial Management (registration, intake/identification, knowledge base, scheduling, appeals management, issues management, monitoring, and case tracking); 3) Compliance Management (registration, intake/identification, monitoring, occurrence management, inspections, licensing, certification and reporting); 4) Entitlement Case Management (intake, eligibility, case workflow, entitlement calculation, contract management, monitoring and payment); 5) Client Service (communication, service initiation, contact centre, knowledge base, sales, channel management, inquiries, case tracking); 6) Investigations (communications, correspondence, scheduling, monitoring and reporting) and any other context that Canada sees fit." Canada has refused to define these in questions #026, #027, #028, #115, #149, #193. Without these detailed Mandatory business requirements, bidders are offering solutions somewhat blindly and the Crown does not have a basis to reject a sub optimal solution. Furthermore, having invested heavily in this opportunity and winning this bid, there could be minimal take-up of the winner's products. We request Canada provide detailed requirements and should this not be possible in the timeframe, the RFP should be retendered to allow time for them to be determined.

Answer: In order to be responsive, a proposed solution must meet the mandatory requirements outlined in Annex C - Statement of Requirements. The requirement described in the bid solicitation is for a flexible and configurable COTS platform from which Canada can quickly configure and deliver numerous business unit solutions, to various Business Units originating from various areas, as stipulated herein. Canada will not increase the scope of the requirements.

Question 223**Reference:** Bid Solicitation Amendment #8, Question and Answer # 188

Question: As the CMSS is planned to be a key Case Management System for the Government of Canada we find it hard to believe that the system does not have to function at 99.9% and that the Crown is willing to accept a solution whereby the functionality for other channels such as office walk-ins, call centre access, internet access could be lost should the email channel not be available. This is not in keeping with the best practices of world class organizations and is not a cost effective way to operate. All modern Case Management Systems can operate on multiple channels and there is no lose of functionality in the other service delivery channels should the email system be down. Your response to make this requirement optional means that the winning case management software will possibly not function in any way if email is down, creating inefficiencies in government operations and

depriving citizens a level of service they expect. This is not acceptable and Canada should require a more stable system. We recommend that this availability issue be addressed immediately thru an additional Mandatory Requirement.

Answer: Canada has reviewed the request and the requirement remains the same. Bidders must refer to Questions and Answers #141 and # 188.

Question 224

Reference: Annex C - Statement of Requirements

Question: There have been many questions asking for amendments to the technical requirements for this bid solicitation to facilitate broad competition amongst COTS case management solution providers that have been denied. There is a serious problem with this bid solicitation. There continues to be elements of the technical description that describe the technical architecture of the software solution "the How" versus the "What or Outcomes"- the basic business functionalities in business terms versus technical architecture terms that the government requires from the COTS case management solution. There are many COTS widely in-use industrial strength case management solutions in the marketplace; each with a unique technical architecture that is part of their IP. Nevertheless, at the business outcome and functionality level, they offer a somewhat common solution set of business functionalities that are able to address the government's needs. Our understanding of this process is that the Crown is seeking a solution for a core set of case management business functionalities and we can meet these requirements if the restrictive and unnecessary technical descriptions of the solution architecture are removed.

Answer: The requirements represent the functionality required for a key initiative aligned with Canada's IT modernization strategy.

Question 225

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."
- Questions and Answers # 056 and # 072
- Mandatory Requirement M-5.7

Question: The Crown has described the technical architecture including the required multi-tenant architecture which is highly restrictive and in our assessment describes architecture for a single case management vendor that is currently in the market place. To make the bid solicitation more fair and open this requirement could be defined using industry standards such as the NIST definition of cloud computing allow additional vendors to be

compliant with the requirements of the RFP. In Mandatory M- 5.7 The Crown has described the technical architecture. "The CMSS must deliver, enable and support the functionality to allow Users to associate and attach emails from the User's email client (MS Outlook Mail) to customer and stakeholder records", whereas this could be described at the business functionality level as the "CMSS should allows users to record emails sent to and from the Case Management System". This would allow each vendor to illustrate their best practices that do not rely on manual intervention of users and replication of data between systems. The above are just two examples. This problem is pervasive throughout this bid solicitation; it has not been resolved through the engagement process prior to the issuing of the bid solicitation and Q&A process. Accordingly, it is requested that this bid solicitation be cancelled and reissued after the technical requirement is scrubbed of all technical architecture requirements. This will facilitate open and fair competition amongst the COTS solution providers of case management software which is not possible under the current bid solicitation.

Answer: The requirements represent the functionality required for a key initiative aligned with Canada's IT modernization strategy. Canada has reviewed the request and the requirement remains the same. Canada will not cancel the bid solicitation.

ALL OTHER TERMS AND CONDITIONS REMAIN THE SAME