



REQUEST FOR PROPOSAL (RFP)	
TITLE	Employment Insurance Long Term Service Delivery Modernization Strategy
SOLICITATION NUMBER	9483-13-0001
SOLICITATION CLOSING DATE	Monday, December 9, 2013 (2:00 p.m.) Eastern Standard Time (EST)
CONTRACTING AUTHORITY	Lisa Plante Contracting Authority Human Resources and Skills Development Canada E-Mail: nc-solicitations-gd@hrsdc-rhdcc.gc.ca
SEND PROPOSAL TO	Human Resources and Skills Development Canada Mail and Distribution Services HRSDC Bid Receiving Unit 140 Promenade du Portage Place du Portage, Phase IV, Level 01 Gatineau, Quebec K1A 0J9

VENDOR/FIRM NAME:	
ADDRESS:	
TELEPHONE NO.:	
E-MAIL:	
FAX NO.:	
NAME AND TITLE OF PERSON AUTHORIZED TO SIGN ON BEHALF OF VENDOR/FIRM (PLEASE PRINT)	
SIGNATURE	DATE
_____	_____
THE SIGNATURE INDICATES ACCEPTANCE OF THE TERMS AND CONDITIONS SET OUT HEREIN	

COMPLETE, SIGN AND INCLUDE WITH YOUR TECHNICAL PROPOSAL



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ADDITIONAL INFORMATION FOR BIDDERS CAN BE FOUND AT THE FOLLOWING WEB SITE:

<http://www.hrsdc.gc.ca/eng/about/contracting/index.shtml>

The following shall apply to the contract:

- Appendix E - General Conditions
- Appendix F – Supplementary Conditions
- Intellectual property – Crown to own Intellectual Property



SECTION A

BIDDER INSTRUCTIONS, INFORMATION AND CONDITIONS

This request for proposal (RFP) is issued by Human Resources and Skills Development Canada (HRSDC).

1. ACCEPTANCE OF TERMS AND CONDITIONS

The first page must be signed by the Bidder or by an authorized representative of the Bidder. Should the page not be signed at bid closing, the bidder will be allowed 24 hours to do so. The signature indicates that the Bidder agrees to be bound by the instructions, information and conditions in their entirety as they appear in this RFP. No other terms and conditions included in the Bidder's proposal will be applicable to the resulting contract notwithstanding the fact that the Bidder's proposal may become part of the resulting contract.

In the event of a proposal submitted by a joint venture, the proposal shall either be signed by all members of the joint venture or a statement shall be provided to the effect that the signatory represents all parties of the joint venture.

2. VENDOR PERFORMANCE

1. Canada may reject a bid where any of the following circumstances is present:

- (a) the Bidder, or any employee or subcontractor included as part of the bid, has been convicted under section 121 (Frauds on the government and Contractor subscribing to election fund), 124 (Selling or purchasing office), or 418 (Selling defective stores to Her Majesty) of the Criminal Code;
- (b) the Bidder is subject to a Vendor Performance Corrective Measure, under the Vendor Performance Policy, which renders the Bidder ineligible to bid on the Work;
- (c) an employee or subcontractor included as part of the bid, is subject to a Vendor Performance Corrective Measure, under the Vendor Performance Policy, which would render that employee or subcontractor ineligible to bid on the Work, or the portion of the Work the employee or subcontractor is to perform;
- (d) with respect to current or prior transactions with the Government of Canada:
 - (i) the Bidder is bankrupt or where, for whatever reason, its activities are rendered inoperable for an extended period;
 - (ii) evidence, satisfactory to Canada, of fraud, bribery, fraudulent misrepresentation or failure to comply with any law protecting individuals against any manner of discrimination, has been received with respect to the Bidder, any of its employees or any subcontractor included as part of its bid;



- (iii) Canada has exercised its contractual remedies of suspension or termination for default with respect to a contract with the Bidder, any of its employees or any subcontractor included as part of its bid;
- (iv) Canada determines that the Bidder's performance on other contracts, including the efficiency and workmanship, as well as the extent to which the Bidder executed the work in accordance with contractual terms and conditions, is sufficiently poor to jeopardize the successful completion of the requirement being bid on.

2. Where Canada intends to reject a bid pursuant to a provision of paragraph 1, other than 1(b), the Contracting Authority will so inform the Bidder and provide the Bidder ten (10) calendar days within which to make representations, prior to making a final decision on the bid rejection.

3. ENQUIRIES REGARDING THE BID SOLICITATION

1. To ensure the integrity of the competitive bid process, enquiries and other communication regarding this procurement are to be directed **only** to the Contracting Authority in writing. Enquiries and other communication are not to be directed to any other government official(s). Failure to comply with this condition during the solicitation period may (for that reason alone) result in the disqualification of the proposal.

2. Enquiries **MUST** be received **no later than seven (7) calendar days** prior to bid closing date to allow sufficient time to provide a response. Enquiries received after that time may not be answered prior to the bid closing date.

3. To ensure consistency and quality of information provided to Bidders, provision will be made to provide, simultaneously to all Bidders to which this RFP has been sent, any information with respect to significant inquiries received and the replies to such inquiries without revealing the sources of the enquiries.

4. PROPOSAL COSTS

No payment shall be made for costs incurred in the preparation and submission of a proposal in response to this RFP.

No costs incurred before receipt of a signed contract or specified written authorization from the Contracting Authority can be charged to any resultant contract.

5. REVISIONS

After the RFP closing date, no revisions to the proposal or additional documentation will be accepted, unless requested by the Contracting Authority. During the evaluation, the Contracting Authority may, at their discretion, submit questions to Bidders to obtain clarifications.



6. RIGHTS OF CANADA

Canada reserves the right to:

- (a) reject any or all proposals received in response to this RFP;
- (b) enter into negotiations with Bidders on any or all aspects of their proposal;
- (c) accept any proposal in whole or in part without negotiations;
- (d) cancel and/or reissue this RFP at any time;
- (e) seek clarification and verify any or all information provided with respect to this RFP;
and
- (f) negotiate with the sole compliant Bidder to ensure best value to Canada.

7. PRICE SUPPORT

In the event that the Bidder's bid is the sole responsive bid received, the Bidder shall provide, on Human Resources and Skills Development Canada's request, one or more of the following as an acceptable price support;

- (a) a current published price list, indicating the percentage discount available to HRSDC, if applicable;
- (b) a copy of paid invoices for like services performed for other customers or for like items sold to other customers, as applicable;
- (c) a price breakdown showing, if applicable, the cost of direct labour, direct materials, purchased items, engineering and plant overheads, general and administrative overhead, transportation, profit, etc.

8. EXAMINATION OF BIDDER'S CAPABILITY

The Bidder agrees that, during the bid evaluation phase, representatives of Canada may conduct, at their discretion, a survey of the Bidder's proposed facilities and technical capabilities for performance of the Work described herein. The Bidder hereby agrees to make its facilities, including its resources and documentation, available for this purpose.

9. PRICING REVIEW

Bidders are advised that a review of the proposed pricing may be required by Canada. Detailed supporting data may be requested by Canada to validate the rates and other charges proposed.

10. APPLICABLE LAWS

Any resulting contract shall be interpreted and governed, and the relations between the Parties determined, by the laws in force in the Province of Ontario, Canada.

The Bidder may, at its discretion, substitute the applicable laws of a Canadian Province or territory of its choice without affecting the validity of its proposal, by deleting the name of the Canadian province



or territory specified and inserting the name of the Canadian province or territory of its choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidder.

11. CLOSURE OF GOVERNMENT OFFICES

Bidder personnel are employees of the Bidder and are paid by the Bidder on the basis of services rendered. Where the Bidder's employees are providing services on government premises pursuant to this Contract and the said premises become non accessible due to a strike or labour stoppage, evacuation or closure of government offices and consequently no work is being performed as a result of the closure, Canada will not be liable for payment to the Bidder for the period of the closure.

12. AUDITED FINANCIAL STATEMENTS

In order to confirm a Bidder's financial capability to perform the subject requirement, the contracting authority reserves the right to have access, during the proposal evaluation phase, to current Bidder financial information. If requested, the financial information to be provided shall include, but not be limited to, the Bidder's most recent audited financial statements or financial statements certified by the Bidder's Chief Financial Officer.

In the event that a proposal is deemed non-responsive because it was determined that the bidder does NOT have the required financial capability to perform the work, an official notice to this effect will be provided to them.

Should the Bidder provide the requested information to Canada in confidence while indicating that the disclosed information is confidential, then Canada will treat the information in a confidential manner as provided in the *Access to Information Act*.



SECTION B

SUBMISSION AND PREPARATION OF PROPOSALS

1. SUBMISSION OF PROPOSAL

ELECTRONIC BIDS WILL NOT BE ACCEPTED. Due to the nature of this solicitation, electronic transmission of a proposal by such means as electronic mail, facsimile, or commercial telex is not considered to be practical and, therefore, will not be accepted.

When responding, the proposal **MUST** be delivered to the following location, by the time and date indicated on the covering page of this RFP document:

HUMAN RESOURCES AND SKILLS DEVELOPMENT CANADA
MAIL AND DISTRIBUTION SERVICES
(HRSDC BID RECEIVING UNIT)
140 PROMENADE DU PORTAGE
PLACE DU PORTAGE, PHASE IV, LEVEL 01
GATINEAU, QUÉBEC
K1A 0J9

Telephone: 819-953-0675

The Bidder's name and return address, the solicitation number and the solicitation closing date and time should be clearly visible on the envelope or parcel containing the proposal. Proposals submitted in response to this RFP will not be returned.

2. PREPARATION OF PROPOSALS

Bidders shall prepare a proposal on 8 ½ x 11 paper, addressing all the requirements of this RFP.

It is requested that the Bidders submit their proposal in four parts (A, B, C and D) which **MUST BE BOUND SEPARATELY**.

Part A – Technical Proposal (**with no reference to price**): four copies

Part B – Financial Proposal: two copies

Part C – Certification and Other Information: one copy

Part D – Security Requirements: one copy

A – TECHNICAL PROPOSAL

The technical proposal should follow specific instructions as they are presented in Section F.



In order to facilitate the evaluation of the proposal, the Bidder is requested to address the mandatory and the point rated requirements in the order they are presented in the Statement of Work.

B – FINANCIAL PROPOSAL

ALL INFORMATION RELATED IN ANY WAY TO PRICE IS TO APPEAR ONLY IN THE FINANCIAL PROPOSAL.

Bidders are to submit their financial proposal in accordance with the following:

- (a) For Canadian-based bidders, prices must be in Canadian funds with Canadian customs duty and excise taxes as applicable included, and Goods and Services Tax (GST) or Harmonized Sales Tax (HST) as applicable, excluded;
- (b) For foreign-based bidders, prices must be in Canadian funds and exclude Canadian duty, excise taxes and GST or HST, as applicable. Canadian customs duty and excise taxes payable to the consignee will be added, for evaluation purposes only, to the prices submitted by foreign-based bidders;
- (c) The total estimated amount of GST or HST is to be shown separately, as applicable.

C – CERTIFICATIONS

Bidders are requested to sign and submit the attached certifications, Section E.

D - SECURITY REQUIRMENTS

Bidders are requested to complete and submit the attached security requirements, Section G



SECTION C

CONDITIONS PRECEDENT TO CONTRACT AWARD

In order to be considered for contract award, a bidder whose proposal is technically and financially responsive, must comply with the following conditions and must provide the necessary documentation to support compliance.

1. CONTRACT CAPACITY

The Bidder shall have the legal capacity to contract. If the Bidder is a sole proprietorship, a partnership or a corporate body, the Bidder shall provide a statement indicating the laws under which it is registered or incorporated together with the registered or corporate name and place of business. In the case of a joint venture, the names and addresses of each member of the joint venture must be provided and the bid must clearly state that it is submitted as a joint venture.

2. NON-PERMANENT RESIDENT (FOREIGN BIDDER) (if applicable))

The Bidder shall ensure that non-permanent residents intending to work in Canada on a temporary basis in fulfillment of the Contract, who are neither Canadian citizens nor United States nationals, receive all appropriate documents and instructions relating to Canadian immigration requirements and secure all required employment authorizations prior to their arrival at the Canadian port of entry.

The Bidder shall ensure that United States nationals having such intentions receive all appropriate documents and instructions in that regard prior to their arrival at the Canadian port of entry. Such documents may be obtained at the appropriate Canadian Embassy/Consulate in the Bidder's country. The Bidder shall be responsible for all costs incurred as a result of non-compliance with immigration requirements.



SECTION D

FINANCIAL PROPOSAL

1. PROJECT TITLE

Employment Insurance Long Term Service Delivery Modernization Strategy

2. FINANCIAL CONTENT

The Undersigned hereby offers to Her Majesty the Queen in Right of Canada, as requested by the Minister, to furnish all expertise, materials, equipments and others things necessary to the entire satisfaction of the Minister or his authorized representative, the work as described in the RFP according to the terms and conditions of the Department.

3. FINANCIAL PROPOSAL

The financial proposal **MUST** be submitted **IN CANADIAN FUNDS**.

4. TAX WITHHOLDING OF 15 PERCENT (15%) (For Non-Canadian Bidders Only)

The Bidder agrees that, pursuant to the provisions of the *Income Tax Act* (Web site: <http://lois.justice.gc.ca/en/I-3.3/index.html>), Canada is empowered to withhold an amount of 15 percent (15%) of the price to be paid to the Bidder, if the Bidder is a non-resident Bidder as defined in said Act. This amount will be held with respect to any liability for taxes which may be owed to Canada.

5. TOTAL PROJECT COST

TOTAL TENDERED PRICE CANADIAN FUNDS	
Total Tendered Price (HST excluded)	\$
HST @ 13%	\$
Total Tendered Price (HST included)	\$

Note: Bidder shall provide his GST/HST registration number and/or Supplier Registration information number (see www.contractscanada.gc.ca).

GST/HST registration number: _____



6. METHOD OF PAYMENT

Payment shall be made within thirty (30) days following the date on which an invoice and substantiating documentation are received according to the terms of the contract.

7. INVOICING INSTRUCTIONS

The invoice **MUST** clearly state the date, contract number, the deliverable/task and the GST number. Any amount to be levied against Her Majesty in respect of the GST/HST is to be shown separately on all invoices for goods supplied or services provided and will be paid by the Government of Canada. The Bidder agrees to remit any GST/HST paid or due to CRA.



SECTION E

CERTIFICATIONS

BIDDER CERTIFICATION

We hereby certify that all information provided herein is accurate. Furthermore we have satisfied ourselves that the personnel proposed by us for this requirement is capable of satisfactorily performing the requirement described herein. In addition, we certify that individuals proposed will be available until completion of the project. Also that the work specified herein can be met in a timely manner, and will be achieved within the time frame allocated.

Signature of Authorized Representative

Date

VALIDITY PERIOD

The Undersigned agree(s) that this Proposal will remain firm for a period of 90 calendar days after the proposal closing date.

Signature of Authorized Representative

Date

LANGUAGE CAPABILITY

The Bidder certified that it has the language capability required to perform the Work, as stipulated in the Statement of Work.

Signature of Authorized Representative

Date



EDUCATION AND EXPERIENCE

The Bidder hereby certifies that all the information provided in the résumés and supporting material submitted with its proposal, particularly as this information pertains to education achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that the individuals proposed by the Bidder for the requirement are capable of satisfactorily performing the Work described herein.

Should a verification by the Minister disclose untrue statements, the Minister shall have the right to declare the proposal non responsive and, pursuant to the default provisions of any resulting contract, terminate any such contract for default.

Signature of Authorized Representative

Date

STATUS AND AVAILABILITY OF RESOURCES

The Bidder certifies that, should it be requested to provide services under any contract resulting from this solicitation, the persons proposed in its proposal will be available to commence performance of the work as required by the Project Authority and at the time specified within or agreed to with the Project Authority.

If the Bidder has proposed any person in fulfillment of this requirement who is not an employee of the Bidder, the Bidder hereby certifies that it has the written permission from such person to propose his/her services in relation to the Work to be performed in fulfillment of this requirement and to submit such person's résumé to the Contracting Authority.

Signature of Authorized Representative

Date

FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY

(OVER \$1,000,000)

The FCP-EE requires that some organizations bidding for federal government contracts, valued at \$1,000,000 or more, make a formal commitment to implement employment equity, as a condition precedent to the contract award. If the Bidder is subject to the Program, evidence of its commitment **MUST** be provided prior to the award of any contract. Note: Contractors that have been declared



“Ineligible Contractors” by HRSDC-Labour

http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml are no longer eligible to receive government contracts over the threshold for solicitation of bids as set out in the GCR (currently at \$25,000), either as a result of a finding of non-compliance by HRSDC-Labour, or following their voluntary withdrawal from the Program for a reason other than the reduction in their workforce. Any bid from ineligible contractors will not be considered for award.

The Bidder is required to certify to its status with FCP-EE, as follows:

The Bidder a.() is not subject to FCP-EE, having a workforce of less than 100 persons in Canada,

b.() is not subject to FCP-EE, being a regulated employer under the *Employment Equity Act*;

c.() is subject to the requirements of FCP-EE, having a workforce of 100 persons or more, but has not previously obtained a certificate number from HRSDC-Labour, (having not bid on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is provided herewith (attached);

d.() is subject to FCP-EE, and has a valid certification number as follows: _____ (i.e. has not been declared “Ineligible Contractor” by HRSDC-Labour).

If the Bidder does not fall within the exceptions enumerated in (a) or (b), the Program requirements do apply, and as such, the Bidder is required to submit a Certificate of Commitment DULY SIGNED as referenced below or a valid Certificate number confirming its adherence to the FCP-EE.

The Bidder acknowledges that the Minister shall rely on this certification to award the contract.

Should verification by the Minister disclose a misrepresentation on the part of the Bidder, the Minister shall have the right to treat any contract resulting from this bid as being in default.

In all cases, the Bidder is required to produce evidence or supporting information on demand prior to contract award, if such evidence is not included with its bid.

Signature of Authorized Representative

Date

FORMER PUBLIC SERVANTS

Contracts with former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny and reflect fairness in spending public funds. In order to comply with Treasury Board policies and directives on contracts with FPS, Bidders must provide the information required below.

Definitions

For the purpose of this clause,



“former public servant” means a former member of a department as defined in the *Financial Administration Act*, R.S., 1985, c. F-11, a former member of the Canadian Armed forces or a former member of the Royal Canadian Mounted Police and includes:

- a) an individual
- b) an individual who has incorporated
- c) a partnership made up of former public servants; or
- d) a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"pension" means, in the context of the fee abatement formula, a pension or annual allowance paid under the [Public Service Superannuation Act](#) (PSSA), R.S., 1985, c.P-36, and any increases paid pursuant to the [Supplementary Retirement Benefits Act](#), R.S., 1985, c.S-24 as it affects the PSSA. It does not include pensions payable pursuant to the [Canadian Forces Superannuation Act](#), R.S., 1985, c.C-17, the [Defence Services Pension Continuation Act](#), 1970, c.D-3, the [Royal Canadian Mounted Police Pension Continuation Act](#), 1970, c.R-10, and the [Royal Canadian Mounted Police Superannuation Act](#), R.S., 1985, c.R-11, the [Members of Parliament Retiring Allowances Act](#), R.S., 1985, c.M-5, and that portion of pension payable to the [Canada Pension Plan Act](#), R.S., 1985, c.C-8.

Former Public Servant in Receipt of a Pension

Is the Bidder a FPS in receipt of a pension as defined above? YES () NO ()

(Note that the information provided in response to the question above may be disclosed publicly, consistent with Treasury Board Policy (http://www.tbs-sct.gc.ca/pubs_pol/dcgpubs/ContPolNotices/2012/10-31-eng.asp))

If so, the Bidder must provide the following information:

- a) name of former public servant,; and
- b) date of termination of employment or retirement from the Public Service.

Work Force Reduction Program

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of a work force reduction program? YES () NO ()

If so, the Bidder must provide the following information:



- a) name of former public servant;
- b) conditions of the lump sum payment incentive;
- c) date of termination of employment
- d) amount of lump sum payment
- e) rate of pay on which lump sum payment is based;
- f) period of lump sum payment including start date, end date and number of weeks; and
- g) number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.

For all contracts awarded during the lump sum payment period, the total amount of fee that may be paid to a FPS who received a lump sum payment is \$5,000, including Goods and Services Tax or Harmonized Sales Tax.

Signature of authorized representative: _____ Date: _____



SECTION F

STATEMENT OF WORK/TERMS OF REFERENCE

Title: Employment Insurance Long Term Service Delivery Modernization Strategy

Objective

The objective of this work is to assist the department in exploring various avenues for a potential modernization initiative that will support continuing improvements in EI service delivery. While the department has achieved significant results over the past decade as a result of ongoing automation and simplification initiatives, given the importance of its programs, the department is looking ahead at possible future service delivery models to meet ever-changing client service expectations and to ensure ongoing cost-effectiveness. EI Service Delivery Modernization is currently in the early stages of discovery and research.

During the coming months, HRSDC will expand its engagement with business & technology leaders with increasing focus on gathering in depth research into business transformation & industry best practices in areas related to service delivery. This will include such activities as common benefits processing potential (multi-program), business process re-design, technical renewal & other modernization themes. To facilitate this effort, HRSDC is seeking the services of an experienced vendor to conduct this work.

This in depth research and analysis on service delivery trends and best practices is intended to expand on our understanding of the potential case for change and allow us to learn more from industry related to success factors, guidelines /conditions in which the best practices could or should be implemented across the enterprise, if we were to advance the thinking around EI Service Delivery Modernization.

Background and Context

Since 2001, HRSDC/SC has been implementing tactical modernization initiatives to automate the Employment Insurance (EI) service delivery, with the dual goal of improving services for clients and achieving efficiencies. The Departmental investments have resulted in significant advancements to date. These improvements have been accomplished by exploiting the current technology and business model to its full capacity. To achieve further significant improvements requires a shift which includes streamlining business processes and exploiting modern technology to support a demanding and dynamic business environment and respond to future service delivery expectations.

An investment to modernize the current service delivery business processes and supporting tools currently delivering EI is needed in order to run and manage the EI Program efficiently and effectively as well as ensure sustainability in the longer term. It



consists of two main components that will support a new service delivery business model for next generation benefits processing and program management including service delivery, processing, appeals, and integrity functions, as follows:

1. **Business:** A business-focused initiative to explore business process simplification to build a more responsive service delivery environment, and
2. **Technology:** replacing a suite of systems and tools built over the last 40 years with a modern, integrated technology solution that is cost-effective and agile (i.e. able to respond quickly to business changes) as well as support expanding service delivery expectations of the future.

Scope

HRSDC must position itself to be able to respond to business changes quickly and continue to improve service delivery while reducing ongoing operational effort and costs. Therefore, HRSDC is looking for an experienced vendor who has been a key partner in previous successful service transformations and demonstrated a proven and successful approach to change management with experience navigating government processes, building awareness and support for major crown initiatives. The scope of this work is to conduct research and analysis and develop concepts in support of EI Service Delivery Modernization.

To date, HRSDC has initiated preliminary and high level investigations into modernization and transformation efforts undertaken by other large organization (both public and private) that have similar roles or provide similar services. This includes both a review of best practices and in some cases, more in-depth case studies. Additionally, work has been done to undertake a current state assessment document and to develop and socialize a standard Business Reference Model that, when combined with design principles, will be the framework for the development of the future state. This information will be made available to the successful bidder.

Key Tasks and Activities

1. **Review and analyze existing key documentation including EI Service Delivery Modernization Contextual Report, Case for Change and supporting documents.**
2. **Conduct Research and Analysis**
Based on review of existing key documentation and on other successful transformation implementations:
 - Develop a research and analysis work plan which will define the areas that require more in-depth research and analysis in order to develop a comprehensive list of options to address the business needs.



- Gather information; conduct targeted in-depth research and analysis in the areas of project/transformation execution, technology, operations, proactive integrity and channel management/alternatives to develop a comprehensive list of options. The objective is to narrow the field of alternatives down to a reasonable number of viable options for rigorous analysis.
- Provide research on industry trends and other jurisdictions in social service delivery which will help shape the long term vision of the program. Areas of research should include but not limited to:
 - Uncovering and examining best practices approach for leveraging technology innovations to enhance end-to-end benefit or program delivery, including multi-channel service delivery considerations, and digital engagement service delivery with clients (web, cloud, telephony, mobile, infrastructure & assets,...)
 - Investigating how or if demographic shifts are impacting clients, workforce and partners (other departments, Provinces and Employers, 3rd party delivery partner) expectations.
 - Examining and evaluating the current and emerging industry technologies or solutions and offerings with a particular focus on innovation and multi-channel operations given that EI Service Delivery Modernization is a potential multi-year initiative expected to span 7-10 years.
- Produce a report to include identification and preliminary findings of comparable best practices in the areas of service delivery project/transformation execution, technology, operations, proactive integrity and channel management/alternatives and consideration of their applicability to the EI Service Delivery Modernization context.

3. Define the long term EI Service Delivery Modernization Vision, develop the Approach and the Multi-year financial Analysis:

- Conduct research on major service delivery business transformations undertaken in the GoC over the past decade to develop a series of comparable project/program metrics (costs, timelines, common issues etc.) and identifying project execution best practices.
- Conduct visioning workshops to support the expansion (or integration) of current departmental work in progress in defining an EI Service Delivery Modernization vision and strategy, and infuse thinking based on research and previous successful industry experience.
- As part of defining the vision, define the scope of intended benefits, identify the problem(s) and opportunities for EI Service Delivery Modernization in



order to define the business need and, ultimately, demonstrate (and where possible, quantify) the value of the investment to the organization.

- Reflective of the research conducted through, consultations with Senior Executives, Central agencies and visioning workshops, develop recommendations to define the scope of this potential initiative, the modernization approach, and the sequencing of the various components.

The EI Service Delivery Modernization Approach must include at a minimum:

- Problem identification statement and opportunities
 - Vision Statement
 - Recommended Scope boundaries (initial and long term)
 - Business Outcomes
 - EI Service Delivery Modernization financial considerations.
 - Estimate an order of magnitude of the total potential cost of this modernization initiatives
 - Strategic fit within the broader GOC context
 - Constraints
 - Considerations of fundamental high-level partnering approach options
 - Define high level business capabilities needed to enable the vision and strategy
- Review and validate the vision, approach and financial analysis with key stakeholders.

4. Develop a global program design and more detailed Concept of Operations for the future state:

- Based on market trends and established and emerging solution leaders, develop alignments that will allow industry innovation, technology directions and strategies to be fully leveraged to the future state service delivery model.
- Engage key resources and stakeholders to define primary architectural and design principles and priorities.
- Identify the primary or critical guiding principles that would support the decision making architectural and design framework, taking into consideration the possibility of an end state solutions that comprises elements of “build, buy and leverage”.
- Develop a multi-faceted strawman “Concept of Operations” document that defines the people, process and technology elements from the key stakeholder perspectives – the client, the staff, employers/business and the organization.

5. Provide strategic advice and thought leadership on additional planning and scoping elements, and implementation options related to the advancement of the EI service modernization roadmap.



Deliverables

Deliverables	% of contract price	Estimated duration**
Approved Project Plan for completion of the deliverables**	5%	15 to 20 days after contract award)
Research and Analysis <ul style="list-style-type: none"> • Research and analysis Work Plan. • Report on identification and preliminary findings of comparable best practices and consideration of their applicability to EI Modernization context 	20%	3 months
EI Service Delivery Modernization Approach <ul style="list-style-type: none"> • Preliminary – for consultation • Draft - for Comment • Final 	10% 10% 10%	6 months
Concept of Operations <ul style="list-style-type: none"> • Initial understanding of industry landscape – COTS, current leading and emerging vendors/products/architectures/technologies. • Concept of Operations Reports <ul style="list-style-type: none"> ○ Preliminary– for consultation ○ Draft- for Comment ○ Final 	 10% 15% 20%	9 months

* Deliverable due dates are to be negotiated after contract award

**These are indicative level of effort and are not sequenced in a particular way. Effort, sequence and timelines will be revised based on the Contractor’s review of



documentation and interpretation of the requirements and documented in an approved Project Plan for delivery of these deliverables.

Contract Period

- The Contract Period will begin on the date the Contract is awarded and ends twelve (12) months from that date.

Cost

- The maximum allocated budget for all costs related to the project is \$1,600,000 excluding taxes.
- Any cost to bring resources from other location will be at the contractor's expense.

Location of Work

- The majority of the work will be completed on-site in the National Capital Region (NCR) at Service Canada's location located at Place Vanier, 333 North River Road, Ottawa, Ontario.
- HRSDC will make Crown facilities available for work related meetings and interactions as required.

Travel

- The Contractor will not be required to travel outside of the NCR.

Performance and Monitoring

- Written status reports will be required on a bi-weekly basis detailing:
 - Status of the all activities/tasks and deliverables in progress;
 - Any outstanding risks or issues
 - Planned activities/ tasks and Specific milestones for the next reporting period
- All reports must be completed using Microsoft Office software (MS Word, Excel and PowerPoint version 2010 or older) and must be provided to HRSDC electronically. 10 color hard copies of the Interim and Final reports must be provided.

Language

The working language of the work is English and all deliverables must be submitted in English.



EVALUATION PROCESS

MANDATORY REQUIREMENTS

The mandatory requirements listed will be evaluated on a pass/fail (i.e. compliant / non-compliant) basis. Proposals that fail to meet the mandatory requirements will be discarded at this stage without further consideration.

Proposals must demonstrate compliance with all of the following specifications and requirements and must provide the necessary documentation to support compliance in order to be considered.

BASIS OF SELECTION:

To be considered responsive, a bid must:

- meet all the mandatory requirement of this solicitation; and,
- obtain the required minimum score in each of the rated requirements.

Highest combined rating of technical merit and price

The compliant bidder with the highest combined rating technical merit (**80%**) and price (**20%**) shall be selected as the preferred supplier to implement the Project, as exemplified in the table below.

Proposals not meeting the requirements will not be evaluated further and will be deemed non-responsive.

Example of Best Value Determination			
	Bidder 1	Bidder 2	Bidder 3
Technical Points	88	82	76
Price Quoted	\$120,000	\$110,000	\$100,000
CALCULATION			
	Technical Points	Rated Price Points	Total Points
Bidder 1	$\frac{88}{88} \times 80 = 80.00$	$\frac{100}{120} \times 20 = 16.67$	96.67



Bidder 2	$\frac{82 \times 80}{*88} = 75.55$	$\frac{**100 \times 20}{110} = 18.18$	93.73
Bidder 3	$\frac{76 \times 80}{*88} = 69.10$	$\frac{**100 \times 20}{100} = 20.00$	89.10
<p>* Represents the highest technical score (including Bonus Points) ** Represents the lowest priced proposal</p>			

Assumption: Three valid bids have been received. The maximum total score that can be obtained is 100 points. The highest technical score and lowest price proposal received full rated percentage and other proposals are pro-rated accordingly.

The winner is the bidder scoring the highest total points established by adding the technical and rated price points. Based on the above calculation, a contract would be awarded to Bidder 1, which offers the highest technical score taking into consideration



Statement of Compliance

The mandatory requirements listed will be evaluated on a pass/fail (i.e. compliant / non-compliant) basis. Proposals that fail to meet the mandatory requirements will be disqualified at this stage without further consideration.

Proposals must demonstrate compliance with all of the following specifications and requirements and must provide the necessary documentation to support compliance in order to be considered.

Definition: “Bidder” means the legal entity submitting the bid.

For the purposes of this section recent and significant experience is defined as experience gained working with at least three major national or international clients within 5 years of the 10 years prior to the bid closing date.

Item#	Mandatory Criteria	Met/Not Met	Supporting Detail
*Tier 1- M1	- The Bidder must demonstrate recent and significant experience in developing business cases for program modernization including demonstrated ability to provide benchmark analysis (i.e. hard numbers and program review materials) to support development of a going forward strategy and associated funding submission.		

* Bidders must meet this mandatory to be considered further in the evaluation process. Proposals that fail to demonstrate, Tier 1, M1 above, will be disqualified at this stage without further consideration.

Item#	Mandatory Criteria	Met/Not Met	Supporting Detail
Tier 2 M1	- At time of bid closing, the Bidder must hold a valid Designated Organization Screening (DOS) with approved Document Safeguarding at the level of SECRET issued by the Canadian and International Industrial Security Division (CIISD), Public Works and Government Services Canada.		



	<ul style="list-style-type: none">- At time of bid closing, the Bidder's proposed senior personnel for the core team requiring access to PROTECTED /SECRET information, assets or work site(s) must each hold a valid SECRET STATUS granted or approved by a Departmental Security Office or the Canadian and International Industrial Security Division (CIISD), Public Works and Government Services Canada.- All other proposed personnel requiring access to PROTECTED information, assets or work site(s) must <u>each</u> hold a valid RELIABILITY STATUS granted and approved by a Departmental Security Office or the Canadian and International Industrial Security Division (CIISD), Public Works and Government Services Canada at bid solicitation closing date.		
M2	The Bidder must demonstrate a minimum of 10 years in the past 15 years of business experience leading technology modernization projects of \$5 Million or higher within the public or private sectors by providing 5 examples (at least 2 of them must be inside Canada).		
M3	The Bidder's proposal MUST not exceed the maximum allocated budget of \$1 600,000 excluding taxes.		
M4	The Bidder must include resumes of proposed resources to demonstrate the experience, skills and competencies offered.		



POINT RATED – Technical Evaluation Criteria for – Firm (i.e “bidder”)

Rating Scale definitions	
Explanation	
Poor:	Covers some points; approach and methodology weak; required knowledge and experience very limited or not applicable at all.
Below average:	covers some points; approach and methodology weak; required knowledge and experience limited or not applicable.
Average:	covers some major points and demonstrates a satisfactory understanding of subject matter, demonstrates average ability. Experience relatively applicable
Above average:	Covers all major points and demonstrates a thorough understanding of subject matter, demonstrates an-above-average ability. Experience applicable
Excellent:	covers all major points and demonstrates a thorough understanding of subject matter, demonstrates a well-above-average ability. Experience very applicable

For the purposes of this section recent and significant experience is defined as experience gained working with at least three major national or international clients within 5 years of the 10 years prior to the bid closing date.

Item#	Rated Criteria	Rating	Max Points	Score	Supporting Detail / Cross Reference to Resume
R1	The Bidder should demonstrate National and International experience working with clients within the public sector.	<ul style="list-style-type: none"> • Excellent -5 points • Above Average – 4 points • Average – 3 points • Below Average – 2points • Poor – 1 point 	5		



Item#	Rated Criteria	Rating	Max Points	Score	Supporting Detail / Cross Reference to Resume
R2	The Bidder should demonstrate recent and significant experience in delivering presentations on complex projects and providing strategic advice to senior public service officials. (Director level and above)	<ul style="list-style-type: none"> • Excellent -5 points • Above Average – 4 points • Average – 3 points • Below Average – 2points • Poor – 1 point 	5		
R3	The Bidder should demonstrate recent and significant experience in modernizing major public facing programs with emphasis on entitlement / benefits or taxation programs (as distinct from licensing or permitting programs).	<ul style="list-style-type: none"> • Excellent -5 points • Above Average – 4 points • Average – 3 points • Below Average – 2points • Poor – 1 point 	5		



Item#	Rated Criteria	Rating	Max Points	Score	Supporting Detail / Cross Reference to Resume
R4	<ul style="list-style-type: none"> • The Bidder should provide a description of their proposed modernization methodology. • Produce a list of projects and a short summary that demonstrates the application of the proposed methodology. 	<p>For the proposed methodology</p> <ul style="list-style-type: none"> • Excellent -5 points • Above Average – 4 points • Average – 3 points • Below Average – 2points • Poor – 1 point • Demonstrated Experience: <ul style="list-style-type: none"> • 1 project • 2 projects • 3 projects • 4 projects • 5+ projects 	5		
R5	<p>The Bidder should demonstrate recent and significant experience in transformation of service delivery to incorporate modern multi-channel and self-service models, with emphasis on application in delivery of entitlement / benefits programs.</p>	<ul style="list-style-type: none"> • Excellent -5 points • Above Average – 4 points • Average – 3 points • Below Average – 2points • Poor – 1 point 	5		



Item#	Rated Criteria	Rating	Max Points	Score	Supporting Detail / Cross Reference to Resume
R6	<p>The Bidders proposal will be rated on its editorial quality since it is considered indicative of the quality of work required under this proposed contract.</p> <p>The following proposal elements will be assessed:</p> <ul style="list-style-type: none"> - Grammatical and typographical correctness; - Organization, conciseness and clarity; and - General appearance 	<ul style="list-style-type: none"> • Excellent -5 points • Above Average – 4 points • Average – 3 points • Below Average – 2points • Poor – 1 point 	5		
	Maximum Points Available		55		
	Passing score		35		



POINT RATED – Technical Evaluation Criteria for – Team (excluding the Team Leader)

Within the technical proposal, the bidder’s team will be assessed against the following criteria:

Item #	Rated Criteria	Rating	Max Points	Score	Supporting Detail / Cross Reference to Resume
R7	<p>The Bidder’s Team will be evaluated, using information provided in their resumes, on:</p> <ul style="list-style-type: none"> • the experience of the proposed resources; • the applicability of the experience to this statement of work; and • the overall composition of the team in terms of the mix of experience, skills and competencies. 	<ul style="list-style-type: none"> • Excellent – 20 points • Above Average – 16 points • Average – 12 points • Below Average – 8 points • Poor – 4 points 	20		
R8 to R10	<p>Project team members should have the following combined experience. Not all members are required to meet each point, but the overall team must have the following experience:</p>				



Item #	Rated Criteria	Rating	Max Points	Score	Supporting Detail / Cross Reference to Resume
R8	- Work researching, analyzing, and developing an approach to business transformation of entitlement / benefits programs.	<ul style="list-style-type: none"> • Excellent -5 points • Above Average – 4 points • Average – 3 points • Below Average – 2points • Poor – 1 point 	5		
R9	- Transformation of service delivery – multi-channel, self-service.	<ul style="list-style-type: none"> • Excellent -5 points • Above Average – 4 points • Average – 3 points • Below Average – 2points • Poor – 1 point 	5		
R10	- Application architectures and COTS platforms for development of flexible solutions (e.g. to meet changing business requirements).	<ul style="list-style-type: none"> • Excellent -5 points • Above Average – 4 points • Average – 3 points • Below Average – 2points • Poor – 1 point 	5		
	Maximum Points Available		35		
	Passing score		21		



POINT RATED Technical Evaluation Criteria for - Team Leader:

Within the technical proposal, the bidders team Leader will be assessed against the following criteria:

Item#	Rated Criteria	Rating	Max	Score	Supporting Detail / Cross Reference to Resume
R11	The Bidder should provide a minimum of 5 project summaries that the proposed resource worked on or led within the past 10 years in strategic planning or case studies for projects that are similar in size and scope to the SOW.	<ul style="list-style-type: none"> • <= 4 project – 1 point • 5 projects – 2 points • 6 projects – 3 points • 7 projects – 4 points • 8+ projects – 5 points 	5		
R12	The Bidder should demonstrate the proposed resource's extent and relevancy of experience in relation to direct planning and management of project teams.	<ul style="list-style-type: none"> • <= 4 project – 1 point • 5 projects – 2 points • 6 projects – 3 points • 7 projects – 4 points • 8+ projects – 5 points 	5		
	Maximum Points Available		10		
	Passing score		6		



SECTION G

SECURITY LEVEL

At time of bid closing, the Bidder must hold a valid Designated Organization Screening (DOS) with approved Document Safeguarding at the level of SECRET issued by the Canadian and International Industrial Security Division (CIISD), Public Works and Government Services Canada.

At time of bid closing, the Bidder’s proposed senior personnel for the core team requiring access to PROTECTED/SECRET information, assets or work site(s) must each hold a valid SECRET STATUS granted or approved by a Departmental Security Office or the Canadian and International Industrial Security Division (CIISD), Public Works and Government Services Canada.

All other proposed personnel requiring access to PROTECTED information, assets or work site(s) must each hold a valid RELIABILITY STATUS granted and approved by a Departmental Security Office or the Canadian and International Industrial Security Division (CIISD), Public Works and Government Services Canada at bid solicitation closing date.

For proposed personnel, who will require access to PROTECTED information, assets and/or sensitive work sites Bidders should provide the following information as part of their proposal. HRSDC will not delay award of contract pending required security clearances.

Team Member	Security Level Clearance	Security Clearance Number	Department Holding Clearance	Date of Birth