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RETURN RESPONSES TO:

RETOURNER LES RÉPONSES À:

Mark Hall (Contracting Authority)
Bid Receiving Shared Services
Canada | Services partagés Canada
180 Kent Street
13th Floor, Office #K-081
Ottawa, Ontario
K1G 4A8

INVITATION TO QUALIFY
INVITATION À SE QUALIFIER

Comments - Commentaires

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

Title – Sujet		
ITQ – Hosted Contact Center Service (HCCS) IASQ – Service de centre de contacts hébergés		
Solicitation No. – N° de l'invitation 10034679/A	**Date** 10 February, 2014	
Client Reference No. – N° référence du client : RAS 13-14706		
GETS Reference No. – N° de référence de SEAG		
File No. – N° de dossier	**CCC No. / N° CCC - FMS No. / N° VME**	
Solicitation Closes – L'invitation prend fin on – le : March 04, 2014 – 04 mars, 2014	**Time Zone / Fuseau horaire** Eastern Standard Time (EST) / Heure Normale de l'Est (HNE)	
F.O.B. - F.A.B. Plant-Usine: ☐ Destination: ☐ Other-Autre: ☐		
Address Inquiries to : - Adresser toutes questions à: Mark Hall	**Buyer Id – Id de l'acheteur** C71	
Telephone No. – N° de téléphone : 613-218-9250	**Email - Courriel** mark.hall@ssc-spc.gc.ca	
Destination – of Goods, Services, and Construction: Destination – des biens, services et construction : See Herein Voir aux présentes		

Issuing Office – Bureau de distribution
Shared Services Canada / Services
partagés Canada
Procurement and Vendor
Relationships
180 Kent Street
13th Floor
Ottawa, Ontario
K1G 4A8

Delivery required - Livraison exigée See Herein / Voir aux présentes	**Delivery Offered – Livraison proposée**

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INVITATION TO QUALIFY
HOSTED CONTACT CENTER SERVICE
FOR
SHARED SERVICES CANADA

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Annexes:
Annex A: Invitation to Qualify – High Level Requirements
Annex B: Invitation to Qualify – Experience Requirements
Annex C: Security Requirements Check List (SRCL)

Forms:
Form 1 – ITQ Submission

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INVITATION TO QUALIFY (ITQ)

HOSTED CONTACT CENTER SERVICE
FOR
SHARED SERVICES CANADA

PART 1   GENERAL INFORMATION

1.1   Preamble

1.1.1   The Government of Canada (GC) established Shared Service Canada (SSC) on August 4, 2011. Part of its mandate is to operate and transform Canada's Information Technology (IT) infrastructure. Certain departments are required by the *Shared Services Canada Act* to obtain their contact center service from SSC. All entities that obtain such services from SSC are referred to in this Invitation to Qualify as SSC's partners.

1.2   Introduction

1.2.1   The pre-qualified suppliers will be referred to as the Qualified Respondents in this solicitation process. Only the Qualified Respondents will be permitted to bid on the subsequent bid solicitation. Below are the intended phases of the solicitation process.

1.2.2   This Invitation to Qualify (ITQ) is neither a Request for Proposal (RFP) nor a solicitation of bids or tenders and is intended only to pre-qualify suppliers. Together this Invitation to Qualify and the subsequent Review and Refine Requirements Phase (RRR) and bid solicitation are the three parts of the solicitation process. These phases are described in detail within Part 3. No contract will result from this Invitation to Qualify.

1.2.3   Suppliers who do not successfully qualify at the Invitation to Qualify Phase will not be able to participate in subsequent phases of the solicitation process.

Solicitation Process	
Invitation to Qualify	Qualification Phase
Review and Refine Requirement	Refine the Statement of Work and Supply Chain Integrity process
Request for Proposal	Only Qualified Respondents can submit a bid

1.2.4   Given that this Invitation to Qualify or the subsequent bid solicitation may be cancelled by Canada at any time in accordance with the applicable terms, it may not result in the subsequent procurement process described in this document. Because the Invitation to Qualify is not a request for a proposal, suppliers who submit a response can choose not to bid on the subsequent bid solicitation.

1.2.5   The Invitation to Qualify is divided into the following parts:

a)   Part 1: General Information, provides an overview of the requirement.

b)   Part 2: Respondent Instructions, provides instructions, clauses and conditions of the Invitation to Qualify.

c)   Part 3: Procurement Process, provides suppliers with an overview of the phases of the procurement process.

d)   Part 4: Response Preparation Instructions: provides suppliers with instructions on how to prepare and submit their response.

e)   Part 5: Evaluation Procedures and Basis of Qualification: indicates how the evaluation of the responses will be conducted, and the basis for selecting the Qualified Respondents.

f)   The following annexes are part of this Invitation to Qualify:

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1.   Annex A: Invitation to Qualify – High Level Requirements.
2.   Annex B: Invitation to Qualify – Experience Requirements.
3.   Annex C: Invitation to Qualify – Security Requirements Check List

1.3   Overview of the Requirement

1.3.1   This Invitation to Qualify is being issued by SSC. It is intended that the contract resulting from any subsequent bid solicitation will be used by SSC to provide shared services to its partners, which include SSC itself, those government institutions for whom SSC's services are mandatory at any point during the Contract Period, and those other organizations for whom SSC's services are optional at any point during the Contract Period and that choose to use those services from time to time. This solicitation process does not preclude SSC from using another method of supply for these or other entities of the Government of Canada with the same or similar needs.

1.3.2   Canada has a requirement for Hosted Contact Center Services (HCCS) providing the following features: session routing, menu services, Automatic Call Distribution (ACD), multimedia channel routing, Interactive Voice Response (IVR), call recording, speech analytics, desktop analytics, quality management, workforce management, reporting functions, system set-up, and administration, for further details refer to Annex A. The contract period for any resulting contract is intended to be 10 years, with Canada retaining the option to extend up to an additional 2 years. This contract period includes the initial implementation and conversion period.

1.4   Scope of Future Request for Proposal

1.4.1   The scope of the requirement described in Annex A is provided for information purposes only and may be used by Canada for discussion in the subsequent Review and Refine Requirements Phase of the HCCS solicitation process. The inclusion of this information in the Invitation to Qualify does not represent a commitment that future requirements for HCCS in any subsequent Request for Proposal will be consistent with this information.

1.5   National Security Exception, Data Sovereignty and Security, Industrial and Regional Benefits Policy

1.5.1   Canada has invoked the National Security Exception in respect of this requirement and as a result, the trade agreements do not apply to this requirement.

1.5.2   The protection of Canada's data which will be processed by the HCCS is paramount to the integrity of government programs and to national security and is also required pursuant to a number of laws, including privacy laws. While all data stored by Canada must be protected against unauthorized access, personal, confidential and sensitive data require even stronger levels of control. Canada's specifications for the HCCS will be designed considering these parameters and the Request for Proposal and Resulting Contract clauses will incorporate various security measures.

1.5.3   The Canadian Industrial and Regional Benefits (IRB) policy may apply to this procurement. For further information on the IRB policy, please refer to the IRB policy website at www.ic.gc.ca/irb.

1.6   Security Clearance Requirement

1.6.1   Security clearance is an important corporate requirement. Canada will require the successful bidder(s) at the RFP stage to meet the security requirements set out in the Annex C before any contract award.

1.6.2   Due to the length of the security clearance process, Canada highly recommends that respondents commence the process as soon as possible.

1.6.3   For more information on personnel and organization security screening please visit PWGSC's Industrial Security Program (ISP) web site. Respondents can also contact CISD by telephone at 1-866-368-4646, or (613) 948-4176 in the National Capital Region.

1.6.4   Canada reserves the right to revise the security requirements following the ITQ Phase. Canada will provide the final contract security clauses at a subsequent phase of this procurement process.

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PART 2   RESPONDENT INSTRUCTIONS

2.1   Standard Instructions, Clauses and Conditions

2.1.1   All instructions, clauses and conditions identified in the Invitation to Qualify by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual (https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) issued by Public Works and Government Services Canada.

2.1.2   Respondents who submit a response agree to be bound by the instructions, clauses and conditions of the Invitation to Qualify.

2.1.3   The 2003 (2013-06-01) Standard Instructions - Goods or Services - Competitive Requirements are incorporated by reference into and form part of the Invitation to Qualify, except that:

a)   Wherever the term "bid solicitation" is used, substitute "Invitation to Qualify";

b)   Wherever the term "bid" is used, substitute "response";

c)   Wherever the term "Bidder(s)" is used, substitute "Respondent(s)";

d)   Subsection 5(4), which discusses a validity period, does not apply, given that this Invitation to Qualify invites suppliers simply to qualify.

e)   Section 3 of the Standard Instructions – Goods and Services – Competitive Requirements 2003 is amended as follows: delete "Pursuant to the *Department of Public Works and Government Services Act*, S.C. 1996, c.16"

f)   Subsections 4 and 5 of section 1 are deleted.

g)   Section 6 and 7 are deleted.

h)   The title of Section 10 is amended to read "Legal Capacity and Ownership and Control Information", the first paragraph is number as 1 and the following is added:

2. The Respondent must provide, if requested by the Contracting Authority, the following information as well as any other requested information related to the ownership and control of the Respondent, its owners, its management and any related corporations and partnerships:

a.   An organization chart for the Respondent showing all related corporations and partnerships;

b.   A list of all the Respondent's shareholders and/or partners, as applicable; if the Respondent is a subsidiary, this information must be provided for each parent corporation or partnership, up to the ultimate owner; and

c.   A list of all the Respondent's directors and officers, together with each individual's home address, date of birth, birthplace and citizenship(s); if the Respondent is a subsidiary, this information must be provided for each parent corporation or partnership, up to the ultimate owner.

In the case of a joint venture Respondent, this information must be provided for each member of the joint venture. The Contracting Authority may also require that this information be provided in respect of any subcontractors specified in a bid.

3. For the purposes of this section, a corporation or partnership will be considered related to another party if:

i.   they are "related persons" or "affiliated persons" according to the Canada *Income Tax Act;*

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ii.   the entities have now or in the two years before the closing date had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or

iii. the entities otherwise do not deal with one another at arm's length, or each of them does not deal at arm's length with the same third party.

i)   For the purposes of this Invitation to Qualify, the PWGSC policies referenced within the Standard Instructions are adopted as SSC policies.

2.1.4   If there is a conflict between the provisions of 2003 and this document, this document prevails. All references to PWGSC contained within the Standard Instructions will be interpreted as a reference to SSC.

2.2   Submission of Responses

2.2.1   Responses must be addressed to the Contracting Authority and the location indicated on page 1 of the ITQ. A cancellation date stamp, a courier bill of lading or a date stamped label from a Delivery Company must indicate that the Response was received on or before the closing date and time. Delivery Company means an incorporated courier company, Canada Post Corporation, or a national equivalent of a foreign country. The Contracting Authority will have the right to ask for information to verify that the Response was received by the Delivery Company on or before the closing date and time. Failure to comply with this request will render the response non-responsive.

2.2.2   Postage meter imprints, whether imprinted by the Respondent or the Delivery Company are not acceptable as proof of timely mailing.

2.2.3   Due to the nature of the ITQ, responses delivered by hand by the Respondent or transmitted by facsimile or e-mail to Shared Services Canada will not be accepted.

2.2.4   Suppliers are requested to send an e-mail notification to mark.hall@ssc-spc.gc.ca prior to the closing date indicating their intention to submit a response.

2.3   Enquiries and Comments

2.3.1   All enquiries must be submitted in writing or electronically to the Contracting Authority identified on the cover page of the Invitation to Qualify no later than 7 calendar days before the Invitation to Qualify closing date. Enquiries received after the date and time specified may not be answered.

2.3.2   Respondents should make enquiries as early as possible and should not make assumptions about the nature of the requirements of this Invitation to Qualify. Respondents who do not raise issues and questions they may have prior to the enquiry deadline do so at their own risk.

2.3.3   Respondents should reference as accurately as possible the section and numbered item of the solicitation process to which the enquiry relates. Care should be taken by respondents to explain each question in sufficient detail in order to enable Canada to provide an accurate answer.

2.3.4   Technical enquiries that are of a "proprietary" nature must be clearly marked "proprietary" at each relevant item. Items identified as proprietary will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the questions or may request that the Respondent do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all respondents. Enquiries not submitted in a form that can be distributed to all respondents may not be answered by Canada.

2.4   Applicable Laws

2.4.1   The relations between the parties will be governed by the laws in force in the Province of Ontario.

2.4.2   A Respondent may, at its discretion, substitute the applicable laws of a Canadian province or territory of its choice without affecting the validity of its Response, by inserting the name of the Canadian province or territory of its choice in Form 1- ITQ Submission. If no other province or territory is specified, the Respondent acknowledges that the laws of Ontario are acceptable to the Respondent.

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2.5 **Language**

2.5.1 Respondents are requested to identify in Form 1- ITQ Submission, which one of Canada's two official languages will be exclusively used for all future communications with Canada and, if successful in the Invitation to Qualify evaluation, for all subsequent phases of the solicitation process.

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PART 3   PROCUREMENT PROCESS

3.1   Overview

3.1.1   The procurement process is shown in Figure 1 and summarized in Table 1.This process will be used until the final Request for Proposal is issued to the Qualified Respondents in the Bid Solicitation Phase. This will allow Canada to conduct due diligence with respect to the HCCS requirements with Qualified Respondents before issuing bid solicitation.
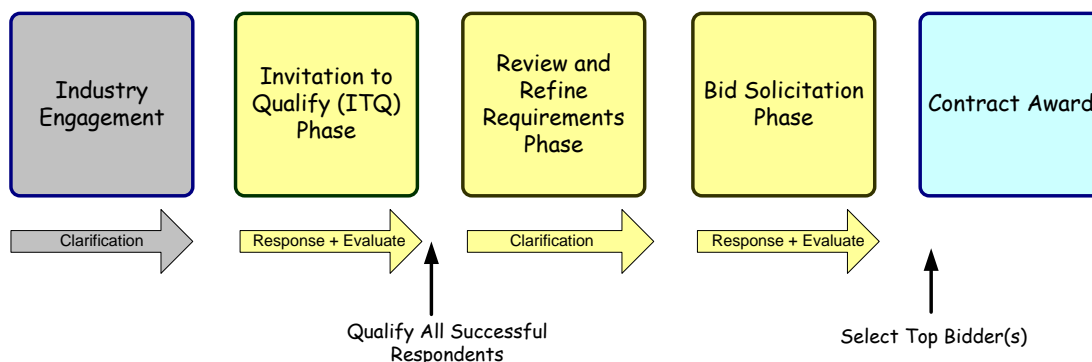

Figure -1 HCCS Procurement Process

Table 1: Summary of HCCS Solicitation Process Phases

Phase	Objectives
Industry Engagement Day 24 Sept 2013	Identify organizations interested in delivering a HCCS for Canada
	Solicit feedback from industry on HCCS and technology trends for the next decade
	This phase has been completed
Invitation to Qualify	Issue Invitation to Qualify on the Government Electronic Tendering Service BuyandSell.gc.ca
	Obtain responses from Respondents
	Evaluate responses
	Select the Qualified Respondents to continue to the Review and Refine Requirements Phase
Review and Refine Requirements	• Qualified Respondents have an opportunity to enhance their understanding of the HCCS requirements and provide feedback on the requirements.
	• Assessment of Supply Chain Security Information
Bid Solicitation	Issue Request for Proposal to all Qualified Respondents
	Obtain bids from the Bidders
	Evaluate the bids
	Select the successful bid

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Contract Award	Award the HCCS contract

3.2   Invitation to Qualify Phase

3.2.1 The purpose of the Invitation to Qualify is to identify the Respondents who have experience in delivering hosted contact center services. Please refer to the detailed evaluation criteria found in Annex B.

3.2.2 Respondents who meet all of the mandatory criteria and requirements will be notified that they are Qualified Respondents and will proceed to the Review and Refine Requirements Phase, described below.

3.2.3 Once the Qualified Respondents have been selected and have been notified that they have qualified for the next phase of the procurement process, Canada intends to proceed with the Review and Refine Requirements Phase. Qualified Respondents may withdraw from the process at any time by providing written notification to the Contracting Authority.

3.3   Review and Refine Requirements Phase

3.3.1 Canada will start the Review and Refine Requirements (RRR) Phase by providing the Qualified Respondents with the detailed process that will be followed for this Phase.

3.3.2 During the RRR Phase, Canada will provide Qualified Respondents with a preliminary Statement of Work (SOW) and interact with Qualified Respondents to seek feedback on and clarify Canada's requirements to refine the SOW further. These interactions could include:

   a) one-on-one sessions;

   b) presentation sessions;

   c) interactive collaborative tools; and/or

   d) written questions and answers.

3.3.3 Canada will consider the feedback provided by Qualified Respondents when finalizing the SOW and its solicitation requirements for use in the Bid Solicitation Phase.

3.3.4 Once the RRR interactions are complete, Canada will distribute the resulting SOW among the Qualified Respondents and will request that Respondents provide the following supply chain security information: a list of IT products (equipment, software, firmware and services) that the Respondent will use to provide HCCS based on Canada's requirements as set out in the SOW, together with network diagrams and a list of subcontractors.

3.3.5 Canada will assess whether, in its opinion, the supply chain security information creates the possibility that the Respondent's solution could compromise or be used to compromise the security of Canada's equipment, firmware, systems or information. More information about this process will be provided to the Qualified Respondents during the RRR Phase.

3.3.6 Only the Respondents who have qualified will continue to be Qualified Respondents and will proceed to the Bid Solicitation Phase described below.

3.4   Bid Solicitation Phase

3.4.1 In the Bid Solicitation Phase, Canada may issue a Request for Proposal to the Qualified Respondents from the RRR Phase.

3.5   Contract Award

3.5.1 Any contract will only be awarded after completion of the Bid Solicitation Phase and any necessary internal approvals have been obtained.

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PART 4   RESPONSE PREPARATION INSTRUCTIONS

4.1   Response Preparation Instructions

4.1.1   **Copies of Response**: Canada requests that Respondents provide their response in separately bound sections as follows:

   a)   Qualification Response (2 hard copies, and 2 soft copies on USB or CD); and

   b)   The soft copies be in a format that is compatible with either Microsoft (.docx) format (e.g., readable with Microsoft Office Suite 2007 or 2010), or Portable Document Format ISO/32000-1 (e.g., readable and searchable with Adobe Acrobat.).

   c)   The Respondents are requested to put a label on the CD(S) and add the following information: The Respondent's name, the Solicitation number, and the signature of the authorized representative.

4.1.2   If there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

   a)   Pricing is not a requirement and should not be included in the response.

4.1.3   **Format for Response**: Canada requests that Respondents follow the format instructions described below in the preparation of their response:

   a)   Either letter 8.5 x 11 inch (216 mm x 279 mm) paper or Legal Size 8.5 x 14 inch (216 mm x 356 mm) paper;

   b)   use a numbering system that corresponds to the Invitation to Qualify;

   c)   include a title page at the front of each volume of the response that includes the title, date, procurement process number, Respondent's name and address and contact information of its representative; and

   d)   include a table of contents.

4.1.4   **Canada's Policy on Green Procurement**: In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process. See the Policy on Green Procurement (http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html). To assist Canada in reaching its objectives, Respondents should:

   a)   use paper containing fibre certified as originating from a sustainably-managed forest and/or containing a minimum of 30% recycled content; and

   b)   use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, and using staples or clips instead of cerlox, duotangs or binders.

4.1.5   **Submission of Only One Response from a Responding Group**

   a)   The submission of more than one response from members of the same responding group is not permitted in response to this Invitation to Qualify. If members of a responding group participate in more than one response, Canada will provide the members of the responding group with 2 working days to identify one response to be considered in this Invitation to Qualify. Failure to meet this deadline will result in all responses being declared non-responsive and disqualified.

   b)   For the purposes of this article, "**responding group**" means all entities (whether those entities include one or more natural persons, corporations, partnerships, limited liability partnerships, etc.) that are related to one another. Regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law, entities are considered "**related**" for the purposes of this Invitation to Qualify if:

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c)   they are the same legal entity (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);

d)   they are "related persons" or "affiliated persons" according to the *Canada Income Tax Act*;

e)   the entities have now or in the two years before the Invitation to Qualify closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or

f)   the entities otherwise do not deal with one another at arm's length, or each of them does not deal at arm's length with the same third party.

4.2 Qualification Response

4.2.1   A complete qualification response consists of the following:

a)   **Form 1 – ITQ Submission (Requested at Invitation to Qualify Closing)**: Respondents are requested to include the Form 1 – ITQ Submission with their responses. It provides a common form in which Respondents can provide information required for evaluation, such as a contact name, the Respondent's Procurement Business Number, the language for future communications etc. Using the form to provide this information is not mandatory, but it is recommended. If Canada determines that the information requested by the Form 1 - ITQ Submission is incomplete or requires correction, Canada will provide the Respondent with an opportunity to do so.

b)   **Annex B - ITQ Experience Requirements.**

    (i)   **Respondent Experience**: Respondents must demonstrate that they have met the experience requirements identified in Annex B. Respondents are requested to provide their responses within Annex B as it provides a common form in which Respondents can provide information required for the evaluation of the respondent's experience.

           Where Respondents are requested to refer to substantiating material in their response, the substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the Respondent has met the requirement. Simply stating that the Respondent is compliant is not sufficient. Where Canada determines that the substantiation is not complete, the Respondent will be declared non-responsive and disqualified. The substantiation should refer to additional documentation submitted with the Response - this information can be referenced in the "Reference to Substantiating Material in Response" column, where Bidders are requested to indicate where in their Response the reference material can be found, including the title of the document, and the page and paragraph numbers; where the reference is not sufficiently precise, Canada may request that the Respondent direct Canada to the appropriate location in the documentation.

    (ii)   **Customer Reference**: The Respondent must provide a customer reference as per Annex B confirming that the Respondent has provided the applicable services. The Respondent may use the same or different customer references.

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PART 5 EVALUATION PROCEDURES AND BASIS OF QUALIFICATION

5.1 Evaluation Procedures

5.1.1 Responses will be assessed in accordance with the entire requirement of the Invitation to Qualify including the evaluation criteria.

5.1.2 An evaluation team composed of representatives of Canada will evaluate the responses. Canada may hire any independent consultant, or use any Government resources, to evaluate any response. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.

5.1.3 Shared Services Canada has engaged Samson & Associés as a fairness monitor for this solicitation process. The fairness monitor will not be part of the evaluation team, but will observe the evaluation of the responses with respect to Canada's adherence to the evaluation process described in this Invitation to Qualify.

5.1.4 In addition to any other time periods established in the Invitation to Qualify:

    a) **Requests for Clarifications**: If Canada seeks clarification or verification from the Respondent about its response, including certifications, the Respondent will have 3 working days (or a longer period if specified in writing by the Contracting Authority) to provide the necessary information to Canada. Failure to meet this deadline will result in the response being declared non-responsive.

    b) **Extension of Time**: If additional time is required by the Respondent, the Contracting Authority may grant an extension in his or her sole discretion.

5.2 Technical Evaluation - Mandatory Technical Criteria

5.2.1 Each response will be reviewed to determine whether it meets the mandatory requirements of the Invitation to Qualify. Any element of the Invitation to Qualify identified with the words "must" or "mandatory" is a mandatory requirement. Responses that do not comply with each and every mandatory requirement will be declared non-responsive and be disqualified.

5.2.2 The mandatory experience requirements are described in Annex B.

5.3 Basis of Qualification

5.3.1 A response must comply with the requirements of the Invitation to Qualify and meet all mandatory evaluation criteria to be declared responsive. A Respondent whose response has been declared responsive is a Qualified Respondent for the next stage of the solicitation process. However, Canada reserves the right to re-evaluate the qualification of any Qualified Respondent at any time during the solicitation process.

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Annex A

INVITATION TO QUALIFY –
HIGH LEVEL REQUIREMENTS

See attached document.

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Annex B

INVITATION TO QUALIFY –
EXPERIENCE REQUIREMENTS

See attached document.

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Annex C

**INVITATION TO QUALIFY –
SECURITY REQUIREMENTS CHECK LIST**

See attached document.

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FORM 1 – ITQ SUBMISSION		
Respondent's full legal name [*Note to Suppliers: Suppliers who are part of a responding group should take care to identify the correct corporation as the Respondent.*]		
Authorized Representative of Respondent for evaluation purposes (e.g., clarifications)	Name	
	Title	
	Address	
	Telephone #	
	Fax #	
	Email	
Respondent's Procurement Business Number (PBN) [*see the Standard Instructions 2003*] [*Note to Respondents: Please ensure that the PBN you provide matches the legal name under which you have submitted your response. If it does not, the Respondent will be determined based on the legal name provided, not based on the PBN, and the Respondent will be required to submit the PBN that matches the legal name of the Respondent.*]		
Preferred language for future communications	English _____ French _____	
Applicable Laws: Respondent is requested to indicate the Canadian province or territory they wish to apply for applicable laws, as indicated in Part 3.		
On behalf of the Respondent, by signing below, I confirm that I have read the entire Invitation to Qualify including the documents incorporated by reference into the Invitation to Qualify and I certify that: 1. All the information provided in the response is complete, true and accurate.		
Signature of Authorized Representative of Respondent		

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Annex A

Invitation to Qualify – High Level Requirements

Hosted Contact Centre Service (HCCS)

For

Shared Services Canada

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1. Overview

1.1.1.1   Canada wants to procure a modernized, centrally managed, and fully hosted national multimedia contact center service.

1.1.1.2   The Hosted Contact Centre Service (HCCS) will include session routing, menu services, Automatic Call Distribution (ACD), multimedia channel routing, Interactive Voice Response (IVR), call recording, speech analytics, desktop analytics, quality management, workforce management, reporting functions, system set-up, and administration.

1.1.1.3   The HCCS must route calls and attached data to and from Government of Canada (GC) premise-based IVRs and IVRs that are part of the HCCS. The Contractor must provide a licensed Application Programming Interface (API) that can be used by GC IVR developers to transfer information from GC IVRs to the HCCS.

1.1.1.4   The HCCS must respond to calls and other forms of contact originating from across Canada, the United States, and internationally to locations throughout Canada.

2. Technical and Functional Requirements
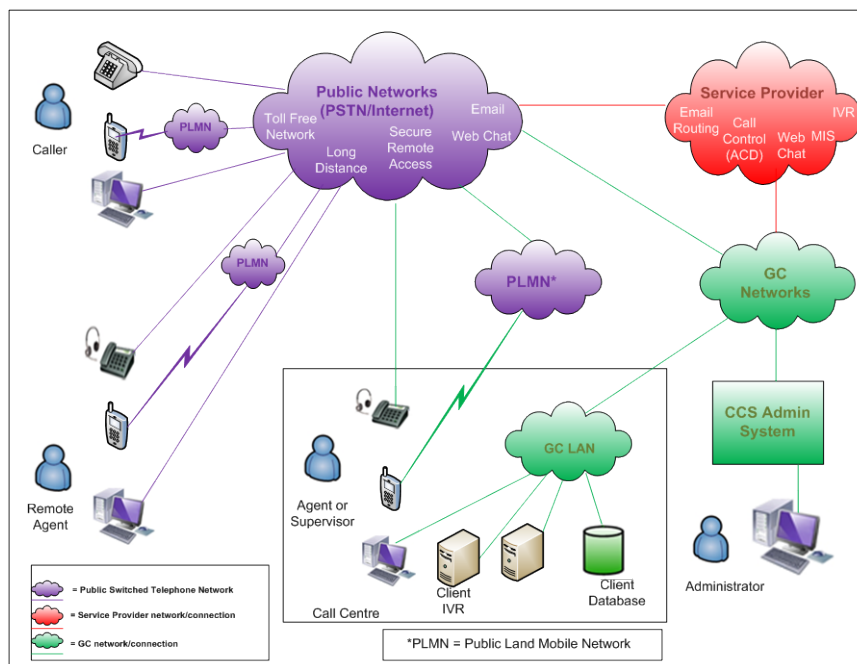
2.1   Target Operational Model

Figure 1: HCCS Network Environment

2.1.1.1   All data and voice traffic must only cross networks within Canada. The only permitted exception is when a person starts an interaction with an agent logged into the Hosted Contact Centre Service from an international location. The voice and data for that interaction only may cross networks outside of Canada.

2.1.1.2   All hardware, software, and support infrastructure for the Hosted Contact Centre Service must reside within Canada. Any contractor personnel accessing the hosted contact centre infrastructure must do so from within Canada and the traffic generated by their actions must cross networks only in Canada.

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2.1.1.3 The HCCS must be hosted at two or more premises provided by the Contractor. Agents, Supervisors, Team Leaders, and contact centre administrators will be located at GC facilities and other locations throughout Canada including their own homes.

2.1.1.4 The Contractor must host the HCCS from a minimum of two locations within Canada that are geographically separated, use different power grids, and served by different Central Offices where the Central Offices can be from one telecommunication service provider or more than one

2.1.1.5 The Contractor must inter-connect the HCCS to the following networks:

   a) Shared Metropolitan Area Network Service (SMS), Secure Channel Network (SC-Net), and the new SSC consolidated network (GCNet) for the purpose of integrating client data sources with the HCCS (databases, calendars, etc.) and for HCCS administration;

   b) GC Voice over Internet Protocol (VoIP) network and the Public Switched Telephone Network(PSTN): to facilitate the delivery of voice calls to an agents; and

   c) SSC Partner specific networks: variable combinations of data and voice oriented services delivered directly to SSC Partner premises.

2.1.1.6 The Contractor must inter-connect the HCCS to the following Public Switched Telephone Network (PSTN) services with no added cost to Canada for accessing these services and regardless of the vendor delivering the local access services:

   a) VoIP, Centrex or PBX digital line services within the GC;

   b) Government Long Distance Service;

   c) Toll-free Service network; and

   d) IVR and call recording services in place at the time of contract award that are not part of the HCCS.

2.1.1.7 The HCCS must interface with Session Initiation Protocol (SIP) trunk connections to GC networks that are identified by Canada, and comply with Internet Engineering Task Force Request for Change (RFC) 3261 in full, and extension RFCs: RFC 3262 and RFC 3265. The RFCs can be found at www.ietf.org.

2.2   General Requirements

2.2.1.1 The Contractor must deliver web-based applications for HCCS users that are compatible with the Microsoft® XP, Windows 7, and more recent Microsoft® Windows operating systems, Microsoft Office 2007 and later, Microsoft Outlook 2007 and later, and the latest 3 major releases of the following web browsers: Opera, Internet Explorer, Chrome and Firefox.

2.2.1.2 The Contractor must deliver APIs that are compatible with the software specified in the previous clause, Windows Server 2008 and more recent Microsoft® Windows operating systems; Exchange 2013 and later.

2.2.1.3 The HCCS must support mobility, visually, and hearing impaired users. Users include Agents, Supervisors, Administrators, and Support Personnel.

2.2.1.4 All user interfaces, documentation, manufacturer system voice prompts, reporting functionality, analytics functionality, and training must be commercially available in both English and Canadian French at contract award. The HCCS must provide a way to transition between English and Canadian French and vice versa without having to install software.

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2.2.1.5 The HCCS must provide integrated multichannel contact routing of the following access channels:

    a) Voice;

    b) Fax;

    c) Email;

    d) Voicemail;

    e) Instant Messaging;

    f) Social Media;

    g) Web Chat;

    h) Video Chat over the web; and

    i) SMS Text Messages.

Not all access channels will be used in all contact centres. Some contact centres will be voice only. Some contact centres will have calls go through an IVR before they are transferred to an agent and some will have calls go directly to agents.

2.2.1.6 The HCCS must allow Canada to add new access channels as they become available.

2.2.1.7 The HCCS must allow authorized users to prioritize the access channels contacts use to reach Canada contact centres. Authorized users must be able to prioritize access channels by business line, queue, skill set, and media type.

2.2.1.8 The HCCS must be able to route calls based on:

    a) Originating number using criteria including but not limited to time of day, numbering plan area code (NPA), NPA/central office exchange code (NXX), queue size, call volumes, and language selected;

    b) Agent skills, an agent possessing a certain skill could be first choice for a particular type of call and a lower choice for other types of calls; and

    c) Time of day, day of week, weekends, holidays.

2.2.1.9 The HCCS must accept calls from Teletypewriter (TTY) devices and call relay systems. TTY calls must be able to be handled on agent workstations instead of requiring a stand-alone TTY device.

2.2.1.10 The HCCS must accept interactions from Internet Protocol versions 4 (IPv4) and 6 (IPv6) enabled devices.

2.3 Volumetrics

2.3.1.1 The Contractor must provide a HCCS with sufficient PSTN facilities to provide a grade of service of P.01 using the Erlang B probability distribution formula.

2.3.1.2 The HCCS must accommodate peak traffic volumes that may fluctuate depending on programs and services being offered to the public. The HCCS must accommodate call traffic with peaks of up to 17,000,000 calls per month.

2.3.1.3 The HCCS must accommodate:

    a) Up to 12,000 agents logged in concurrently. Agent groups can range in size from 1 to 1,000;

    b) Up to 10,000 IVR ports in use concurrently;

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    c)   Up to 5,000 queues in use concurrently;

    d)   Up to 10,000 skill sets in use concurrently;

    e)   Up to 250 geographically-distributed sites in use concurrently;

    f)   Up to 10,000 calls per hour. Call count includes both agent assisted and IVR only calls;

    g)   Up to 100,000,000 calls per year. Call count includes both agent assisted and IVR only calls; and

    h)   Average call duration of 6 minutes.

2.4   Centralized Queuing

2.4.1.1   The HCCS must keep inbound and outbound dialer dialled outbound telephone-based contacts in queue waiting for the next available agent regardless of the agent's physical location. Telephone-based contacts must be staged at a centralized point until an appropriate agent is available. The call is not transferred to the agent's location until the agent is available to handle the client.   The HCCS must provide multiple centralized queues.

2.5   User Profiles

2.5.1.1   The HCCS must allow authorized users to define multiple hierarchy settings that limit visibility to specific individuals or groups. For example, agents must be able to view their individual statistics and potentially rolled up statistics of groups within their own location but they must not be able to view another agent's statistics. The hierarchy levels include; but are not limited to; Agent, Quality Support Agent, Supervisor (Team Leader), Supervisor, Traffic Controller, Learning and Development, Manager, Director, and SSC support.

2.6   Message/Queuing Functionality

2.6.1.1   The HCCS must be able to queue at least 5,000 concurrent calls for each queue in the HCCS.

2.6.1.2   The HCCS must provide music and pre-recorded messages to callers waiting on-hold and in-queue. Callers must automatically be connected and re-connected to a music source when not listening to an in-queue or on-hold message, without it affecting their position in queue.

2.6.1.3   The HCCS must allow SSC Partners to:

    a)   Provide their own music source for callers waiting on hold;

    b)   Use Contractor-provided SOCAN licensed or non-copyrighted music;

    c)   Record their own announcements (facilitated by SSC Partners' administrators with access control rights to the HCCS);

    d)   Use Contractor-provided announcements;

    e)   Optionally disable background music;

    f)   Optionally disable the announcement of the time left in the queue; and

    g)   Optionally disable the ability for callers to leave voice messages.

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2.7 Storage

2.7.1.1 The HCCS must have the flexibility of storing any data generated as the result of using any HCCS services or application at GC facilities.

2.7.1.2 The HCCS must provide storage capacity to store 3 years of all reporting data and audio from every call. Canada reserves the right to record 100% of all calls processed by the HCCS.

2.7.1.3 The HCCS must allow SSC to segregate recordings by SSC partner so that the recordings can be managed and controlled exclusively by the applicable SSC Partner as cited by the Technical Authority.

2.7.1.4 Upon request from the Technical Authority, and within 10 working days of the request, the Contractor must provide the Technical Authority with all HCCS configuration data in CSV format and IVR recordings in MP3 or WAV format.

2.8 Reporting Functionality

2.8.1.1 Provide real-time and historical reporting at an agent, team, supervisor, site, and business line level.

2.8.1.2 The HCCS must provide system reports that include:

a) HCCS configuration;

b) Audit trail information including component accessed, user name, date, and time of access; and

c) Error reports.

2.8.1.3 The HCCS must provide cradle to grave reporting of each voice call. The HCCS must report on a contact from the time the call is presented to the GC toll-free network until the call is ended by the agent or the caller. The HCCS must report what toll-free number was called, what terminating directory number the call was routed to, if the call was answered, how long the call waited in queue before it was answered, how long the call spent in the IVR before it was transferred to an agent, how long the caller talked to the agent, and how long the agent took performing after call work.

2.8.1.4 The HCCS must report on instant messaging contacts, web chat contacts, email contacts. The reports must include where the contact originated from, the name of the agent who handled the contact, the amount of time spent on the contact, if the contact was transferred to another agent, and how long the agent took performing after call work.

2.8.1.5 The HCCS must report on a specific account across multiple contact channels. The HCCS must allow an authorized user to specify an account (or multiple accounts) and produce a report that lists all contact channels that account used.

2.9 IVR Functionality

2.9.1.1 The HCCS IVR must receive and interpret spoken natural language commands by the caller, in both English and Canadian French.

2.9.1.2 The HCCS IVR must receive and interpret dual-tone multi-frequency tones (DTMF).

2.9.1.3 The HCCS IVR must perform voice authentication using voice print technology.

2.9.1.4 The HCCS IVR must have text-to-speech and speech-to-text functionality.

2.9.1.5 The HCCS must provide reports specific to the HCCS IVR. These reports must include time spent in the IVR, the path the caller took in the IVR, and where the caller asked to transfer to an agent.

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2.10 Call Recording Functionality

2.10.1.1 The HCCS must be able to record complex calls. i.e., when the agent puts the caller on hold and consults with helpdesk, transfer the call (simple or supervised transfer), or creates a three-way conference call. The conversation of the agent with all the parties must be recorded; if the system has to generate several recordings for one of the above scenarios the recordings must be easy to identify and review as the recordings from one conversation.

2.10.1.2 The HCCS must recreate the call and the related desktop experience.

2.10.1.3 The HCCS must record in stereophonic format for speaker separation purposes.

2.10.1.4 The HCCS must allow recorded calls to be searched, filtered and retrieved.

2.11 Speech Analytics

2.11.1.1 The Contractor must provide a speech analytics component that can perform real-time and historical analytics. Real-time analytics must be performed without storing audio on a permanent storage device.

2.11.1.2 The speech analytics component must allow calls to be re-categorized without having to access the original audio recording.

2.11.1.3 The speech analytics component must allow new categories to be created without having to re-process audio from calls that were already categorized.

2.11.1.4 The HCCS must identify trending phrases that a caller uses during a call. A phrase can be as short as one word.

2.11.1.5 The speech analytics component must perform all requirements of this section using the recording platform provided by the Contractor.

2.11.1.6 The speech analytics component must have an audit mechanism to track every user who accessed voice recordings and transcripts, what actions they performed, and any configuration changes they made that affect call categorization and searching.

2.11.1.7 The speech analytics component must allow users to specify English and Canadian French words in the same search.

2.11.1.8 The HCCS must consolidate search results for English and French terms that are the same in the same result set.

2.12 Multimedia Contextual Analytics

2.12.1.1 The HCCS must recognize words in e-mails, text messages, Instant Messages (IM), Web chats, and Social Media and the HCCS must trigger/initiate contact with an agent based on the recognized words.

2.12.1.2 The HCCS must automatically categorize e-mails, chat messages, and text messages based on categories defined by authorized users.

2.12.1.3 The HCCS must perform the contextual analysis in real-time and historically.

2.13 Quality Management and Surveys

2.13.1.1 The HCCS must allow authorized users to perform remote quality listening. The authorized user must be able to listen to an agent's conversation with a client in real-time and see what the agent is seeing on their screen, with or without the agent's knowledge.

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2.13.1.2 The HCCS must allow authorized user to perform remote quality listening using any communications device they choose (cell phone, Centrex device, VoIP extension, etc.) to listen in to agent conversations with clients.

2.13.1.3 The HCCS must allow authorized users, using a web browser, to assess an Agent's performance by listening to an Agent call recording and score the results (that is an Agent Call Quality Assessment) using a Call Quality Assessment Form.

2.14 Computer Telephony Integration (CTI)

2.14.1.1 The HCCS must provide screen pop functionality to allow selected applications to "pop" information screens to agents based on calling number, digits entered by the caller, or other information passed from the IVR. The screen must be presented to the agent at the same time as the call.

2.14.1.2 The supported API or toolkit must enable customization of CTI screen pop-up functionality to interface with available external client information sources.

2.15 Outbound

2.15.1.1 The HCCS must provide outbound dialing capabilities: Preview Dialing, Power Dialing, Progressive Dialing, and Predictive Dialing. The dialer must allow multiple campaigns to be running at the same time in any combination of preview, predictive, power and progressive dialing modes. Canada must be able to add telephone numbers to a do-not-call list to prevent the dialer from dialing certain numbers. The dialer must maintain call history for each outbound call attempt made.

2.15.1.2 The HCCS outbound dialer must accurately detect and record the following call results: Busy; No Answer; Standard Information Tones (SIT); Fast Busy; Answering Machine; Fax Machine; Human Answer; and Pager.

2.15.1.3 The HCCS must route an outbound call dialled by the dialer based on the call result detected by the dialer.

2.15.1.4 The HCCS must allow authorized users to configure the HCCS so that it does not dial a phone number outside of the acceptable time periods governed by the Canadian Radio and Telecommunications Commission (CRTC).

2.15.1.5 The HCCS must allow authorized users to exclude one or more area codes from the dialler on one or more dates, for example do not dial certain area codes during a local emergency or during a provincial holiday.

2.15.1.6 The HCCS outbound dialer must dial any valid telephone number. The dialer must dial local, long distance, and international telephone numbers.

2.16 Workforce Management (WFM)

2.16.1.1 The HCCS must provide the following automated workforce management functions; forecasting, scheduling, shift optimization, real-time shift and schedule adherence, and vacation automation.

2.16.1.2 The HCCS must use data and statistics from all other components of the HCCS to forecast, schedule agents, etc.

2.16.1.3 The HCCS must utilize connects ratio and accessibility rates in calculations to forecast outbound agent requirements.

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2.17 Compatible with Electronic Viewing Board

2.17.1.1 HCCS must allow authorized users to display messages to external display devices in real-time.

3. Security for HCCS Equipment and Services

3.1 Location of Facilities, Databases, Data, and Network Traffic Routing

3.1.1.1 The Contractor must provide the HCCS facilities, including those for data storage and network redundancy in Canada.

3.1.1.2 The Contractor must locate all the databases containing any information related to the GC, including billing and/or call detail information, in Canada such databases and data will remain the property of the GC.

3.1.1.3 The Contractor must ensure that all data relating to this Contract is accessed and processed only in Canada, including all HCCS design, implementation and support documentation.

3.1.1.4 The Contractor must ensure that all domestic network traffic (meaning traffic initiated in one part of Canada to a destination or individual located in another part of Canada) is routed exclusively through Canada.

3.2 Network Connectivity and Access Control

3.2.1.1 The Contractor must safeguard the network and all databases including GC data or information all times by taking all reasonable measures to secure it and protect its integrity and confidentiality.

3.2.1.2 The Contractor must maintain an audit log that automatically records all attempts to access the HCCS, as well as any databases that include GC data or information maintained by the Contractor about GC departments (including but not limited to billing information and call detail information).

3.2.1.3 The Contractor must ensure that every action, transaction or business function performed on the Contractor's network, systems, or databases relating to the HCCS is traceable to an individual user or account (by ensuring that user identifiers and accounts are unique and cannot be shared or transferred from one individual to another).

3.3 Authorizations and Access Profiles

3.3.1.1 The Contractor must provide a HCCS that supports separation of duties, and that allows administrators to create Access Profiles for agents and supervisors, which grant and restrict levels of access to HCCS functionality by, but not limited to:

    a)   Job function;

    b)   Program within a GC department;

    c)   Site of agent/supervisor; and

    d)   Security clearance.

3.4 Privacy and Data Segmentation

3.4.1.1 The Contractor must comply with requirements of the Privacy Act.

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3.4.1.2   SSC partner data must be segmented so that only the SSC partner that owns it can access it.

3.5   Security Assessment and Authorization (SAA)

3.5.1.1   The Contractor must complete a Security Assessment including:

a)   A list of all personnel to whom the Contractor has granted access to the network or to GC departmental data, and the current level of security clearance granted to each individual by the GC; and

b)   A completed Security Requirements Traceability Matrix (SRTM), for all components in the HCCS, with evidence to support all assertions.   The SRTM, based on ITSG-33, will be provided to the Contractor by SSC as a Microsoft Excel spreadsheet at the time of contract award.

3.5.1.2   The Contractor must provide a Safeguard Action Plan (SAP), which must include:

a)   A list of all risks identified during the SA&A process; and

b)   Details for addressing each risk, including planned mitigation activity, level of effort required to complete, resources required and target completion dates.

4. HCCS Portal

4.1   General Requirements

4.1.1.1   The Contractor must provide a web-based, secure central access and exchange point for all HCCS information including, receipt and submission of Quotations, Hosted Contact Centre Service Order (HCCSO) requests, price lists and tables, notifications, HCCS Call Detail, Service Management and Historical reports, invoices, acceptance plan test results, Site Migration Schedules service documentation, contacts, escalation processes, and Incident Management processes.

4.1.1.2   The HCCS Portal must conform to the TBS Standard on Web Usability (http://www.tbs-sct.gc.ca/clf2-nsi2/index-eng.asp)

5. HCCS Support and Maintenance

5.1   Configuration

5.1.1.1   The HCCS must allow authorized users to perform Create/Delete/Modify to the following parameters on site or remotely: Users, Users' profiles, Skills, Queues, Queue Menus, E-mail Queues, Voice Mail Queues, E-mail Groups, Instant Message groups, Session Initiation Protocol (SIP) Groups, Not Ready Codes, Line of Business Codes, Transfer Directory Numbers, Reports, etc.

5.2   HCCS Availability

5.2.1.1   The HCCS must be available 24 hours a day/7 days a week/throughout the year, momentary interrupts caused by transferring from active to standby for required maintenance work must be approved in advance by SSC.

5.2.1.2   The HCCS must have a monthly availability of 99.999% or better for each HCCS business line. This excludes the PSTN, the Toll-free network and GC-owned networks.

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6. Professional Services

6.1.1.1   Canada may choose to procure professional services under this Contract to assist in the migration of contact centre services from the incumbent's facilities over to this contract. The types of professional services Canada may require are: Technology Architect, Contact Centre Consultant, Technical Support Specialist, IT Security Analyst, Application Developer, Database Administrator, System Tester, and Web Design Business Analyst.

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Annex B

Invitation to Qualify – Experience Requirements

Hosted Contact Centre Service (HCCS)

For

Shared Services Canada

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Criteria 1: Respondent Experience

Criteria	Reference to Substantiating Material in Response
The Respondent must demonstrate that they have provided a hosted contact centre service to an organization for a period of at least 24 continuous months in the last 3 years leading up to the first published response closing date, where the contact centre, as implemented, included all of the following:	
a) a minimum of 5 sites where each site has at least 1 hosted contact centre service agent handling contacts. Each site must be in a different city where no one city can be within 100KM of the other. The Respondent must provide the 5 civic addresses and city of these sites.	
b) a minimum of 1,000 agents logged in concurrently for a minimum consecutive period of 2 hours per day Monday to Friday, excluding statutory holidays. The Respondent must provide a report which demonstrates this requirement.	
c) a minimum of 500 IVR ports in use concurrently for a minimum of 2 hours per day Monday to Friday. The Respondent must provide a report that demonstrates compliance with this requirement.	
d) the hosted contact centre service agents must have handled voice, email, SMS text message, voice mail, and Instant Message contacts using the contact centre service. The Respondent must provide a report for the calendar year 2013 that lists the number of voice, email, SMS, text message, voice mail, and instant message contacts that were handled by the agents using the hosted contact centre service.	
e) a minimum of 100 agent skills. *For example: English, French and collections are all skills.* The Respondent must provide a configuration report that demonstrates compliance with this requirement.	

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CRITERIA 1: CUSTOMER REFERENCE (PAGE 1 OF 2)

Name of Respondent:	
Solicitation number:	**10034679**

The Respondent has provided a hosted contact centre service to an your organization for a period of at least 24 continuous months in the last 3 years leading up to the first published response closing date, where the contact centre, as implemented, included all of the following:

a) a minimum of 5 sites where each site has at least 1 hosted contact centre service agent handling contacts. Each site must be in a different city where no one city can be within 100KM of the other.

b) a minimum of 1,000 agents logged in concurrently for a minimum consecutive period of 2 hours per day Monday to Friday, excluding statutory holidays.

c) a minimum of 500 IVR ports in use concurrently for a minimum of 2 hours per day Monday to Friday.

d) the hosted contact centre service agents must have handled voice, email, SMS text message, voice mail, and Instant Message contacts using the contact centre service.

e) a minimum of 100 agent skills.

For example: English, French and collections are all skills.

*The customer reference is requested to complete the chart below and confirm whether they have received all of the services as described above by indicating either, "**Yes", "No", "UR" or "N/A"**.*

_____
("Yes", "No", "UR" or "N/A")

The customer reference is requested to list the five (5) civic address of each site below in reference to section (a) above.

1. _____

2. _____

3. _____

4. _____

5. _____

The customer reference must enter "Yes" or "No", "UR" where "UR" means Unable to Respond or "N/A" where "N/A" means Not Applicable.

By responding "Yes", the customer reference confirms that the Respondent has delivered the relevant goods and /or services to the customer reference.

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CRITERIA 1: CUSTOMER REFERENCE (PAGE 2 OF 2)

By responding "No", the customer reference confirms that the Respondent has not delivered all of the goods and/or services to the customer reference.

By responding "Unable to Respond (UR)", the customer reference confirms that they are unwilling or unable to provide any information about whether the Respondent has delivered the goods and/or services to the customer reference.

By responding "Not Applicable (N/A)", the customer reference confirms that they are unable to provide any information about whether the Respondent has delivered the goods and/or services to the customer reference.

Business name of customer reference:	
Name, title and phone number of customer reference:	
Signature of the authorized representative of the customer: By signing, I confirm that I am an authorized representative of the organization identified above as the customer reference and that I have read and confirm the information provided is true and accurate.	

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CRITERIA 2: RESPONDENT EXPERIENCE

Criteria	Reference to Substantiating Material in Response
The Respondent must demonstrate that they have provided hosted contact centre service support that has included the following:	
a) 24 hours per day, 7 days per week, 365 days per year (24x7x365) service monitoring	
b) (24x7x365) change management and incident tracking	
c) provided bilingual (English and French) support	
d) (24x7x365) event/incident escalations	
e) provided 4 hour or less service restoration times	
f) provided maintenance windows outside of normal business hours (08:00 – 17:00) or if within normal service hours, on a client approved basis	

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CRITERIA 2: CUSTOMER REFERENCE

Name of Respondent:	
Solicitation number:	**10034679**

The Respondent has provided contact centre service support to your organization that has included the following:

    a) 24 hours per day, 7 days per week, 365 days per year (24x7x365) service monitoring

    b) (24x7x365) change management and incident tracking

    c) provided bilingual (English and French) support

    d) (24x7x365) event/incident escalations

    e) provided 4 hour or less service restoration times

    f) provided maintenance windows outside of normal business hours (08:00 – 17:00) or if within normal service hours, on a client approved basis

*The customer reference is requested to complete this chart and confirm whether they have received all of the services described above by indicating either, "**Yes", "No", "UR" or "N/A**".*

_____
("Yes", "No", "UR" or "N/A")

The customer reference must enter "Yes" or "No", "UR" where "UR" means Unable to Respond or "N/A" where "N/A" means Not Applicable.

By responding "Yes", the customer reference confirms that the Respondent has delivered the relevant goods and /or services to the customer reference.

By responding "No", the customer reference confirms that the Respondent has not delivered all of the goods and/or services to the customer reference.

By responding "Unable to Respond (UR)", the customer reference confirms that they are unwilling or unable to provide any information about whether the Respondent has delivered the goods and/or services to the customer reference.

By responding "Not Applicable (N/A)", the customer reference confirms that they are unable to provide any information about whether the Respondent has delivered the goods and/or services to the customer reference.

Business name of customer reference:	
Name, title and phone number of customer reference:	
Signature of the authorized representative of the customer: By signing, I confirm that I am an authorized representative of the organization identified above as the customer reference and that I have read and confirm the information provided is true and accurate.	

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CRITERIA 3: RESPONDENT EXPERIENCE

Criteria	Reference to Substantiating Material in Response
The Respondent must demonstrate that they have provided a minimum of 1 customer accessible service portal for a period of at least 24 continuous months in the last 3 years leading up to the first published response closing date, where the service portal(s) met or exceeded all of the following:	
a) 24 hours per day, 7 days per week, 365 days per year (24x7x365) secure web browser on-line access using TLS (Transport Layer Security)	
b) provided online help	
c) provided incident and change recording and tracking	
d) provided service reporting including reporting on service level metrics	
e) provided service order recording and tracking	
f) provided service documentation including operations guides and procedures	
g) provided billing information online	

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CRITERIA 3: CUSTOMER REFERENCE (PAGE 1 OF 2)

Name of Respondent:	
Solicitation number:	**10034679**

The Respondent has provided your organization with a minimum of 1 customer accessible service portal for a period of at least 24 continuous months in the last 3 years leading up to the first published response closing date, where the service portal(s) met or exceeded all of the following:

- **a)** 24 hours per day, 7 days per week, 365 days per year (24x7x365) secure web browser on-line access using TLS (Transport Layer Security)

- **b)** provided online help

- **c)** provided incident and change recording and tracking

- **d)** provided service reporting including reporting on service level metrics

- **e)** provided service order recording and tracking

- **f)** provided service documentation including operations guides and procedures

- **g)** provided billing information online

*The customer reference is requested to complete this chart and confirm whether they have received all of the services described above by indicating either, "**Yes", "No", "UR" or "N/A**".*

_____
("Yes", "No", "UR" or "N/A")

The customer reference must enter "Yes" or "No", "UR" where "UR" means Unable to Respond or "N/A" where "N/A" means Not Applicable.

By responding "Yes", the customer reference confirms that the Respondent has delivered the relevant goods and /or services to the customer reference.

By responding "No", the customer reference confirms that the Respondent has not delivered all of the goods and/or services to the customer reference.

By responding "Unable to Respond (UR)", the customer reference confirms that they are unwilling or unable to provide any information about whether the Respondent has delivered the goods and/or services to the customer reference.

By responding "Not Applicable (N/A)", the customer reference confirms that they are unable to provide any information about whether the Respondent has delivered the goods and/or services to the customer reference.

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CRITERIA 3: CUSTOMER REFERENCE (PAGE 2 OF 2)

Business name of customer reference:	
Name, title and phone number of customer reference:	
Signature of the authorized representative of the customer: By signing, I confirm that I am an authorized representative of the organization identified above as the customer reference and that I have read and confirm the information provided is true and accurate.	

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CRITERIA 4: RESPONDENT EXPERIENCE

Criteria	Reference to Substantiating Material in Response
The Respondent must have provided the following billing services:	
a) one invoice for a service where the invoice is then broken down by individual business unit within the same organization	
b) a monthly detailed usage report that is broken down by business unit within the same organization	
c) a monthly report that tracks the amount invoiced that is broken down by business unit within the same organization	

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CRITERIA 4: CUSTOMER REFERENCE

Name of Respondent:	
Solicitation number:	**10034679**

The Respondent has provided to your organization the following billing services:

a)   one invoice for a service where the invoice is then broken down by individual business unit within the same organization.

b)   a monthly detailed usage report that is broken down by business unit within the same organization

c)   a monthly report that tracks the amount invoiced that is broken down by business unit within the same organization

*The customer reference is requested to complete this chart and confirm whether they have received all of the services described above by indicating either, "**Yes", "No", "UR" or "N/A"**.*

_____
("Yes", "No", "UR" or "N/A")

The customer reference must enter "Yes" or "No", "UR" where "UR" means Unable to Respond or "N/A" where "N/A" means Not Applicable.

By responding "Yes", the customer reference confirms that the Respondent has delivered the relevant goods and /or services to the customer reference.

By responding "No", the customer reference confirms that the Respondent has not delivered all of the goods and/or services to the customer reference.

By responding "Unable to Respond (UR)", the customer reference confirms that they are unwilling or unable to provide any information about whether the Respondent has delivered the goods and/or services to the customer reference.

By responding "Not Applicable (N/A)", the customer reference confirms that they are unable to provide any information about whether the Respondent has delivered the goods and/or services to the customer reference.

Business name of customer reference:	
Name, title and phone number of customer reference:	
Signature of the authorized representative of the customer: By signing, I confirm that I am an authorized representative of the organization identified above as the customer reference and that I have read and confirm the information provided is true and accurate.	

Annex C - Security Requirements Checklist (SRCL)

Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat
13 – 14 7086 0
Security Classification / Classification de sécurité Unclassified

SECURITY REQUIREMENTS CHECK LIST (SRCL)
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE

1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine **Shared Services Canada**	2. Branch or Directorate / Direction générale ou Direction **TSSD**

3. a) Subcontract Number / Numéro du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant

4. Brief Description of Work / Brève description du travail

Provide a Hosted Contact Centre Service(HCCS), that the Contractor will host from their premises, where contacts from citizens and employees will be routed through the HCCS to Government of Canada agents located anywhere in Canada.

	No / Non	Yes / Oui
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?	✓	
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?	✓	

6. Indicate the type of access required / Indiquer le type d'accès requis

	No / Non	Yes / Oui
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)		✓
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.		✓
6. c) Is this a commercial courier or delivery requirement with **no overnight storage**? S'agit-il d'un contrat de messagerie ou de livraison commerciale **sans** entreposage de nuit?	✓	

7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès

Canada	✓	NATO / OTAN		Foreign / Étranger	

7. b) Release restrictions / Restrictions relatives à la diffusion

No release restrictions Aucune restriction relative à la diffusion	✓	All NATO countries Tous les pays de l'OTAN		No release restrictions Aucune restriction relative à la diffusion	
Not releasable À ne pas diffuser					
Restricted to: / Limité à :		Restricted to: / Limité à :		Restricted to: / Limité à :	
Specify country(ies): / Préciser le(s) pays :		Specify country(ies): / Préciser le(s) pays :		Specify country(ies): / Préciser le(s) pays :	

7. c) Level of information / Niveau d'information

PROTECTED A / PROTÉGÉ A		NATO UNCLASSIFIED / NATO NON CLASSIFIÉ		PROTECTED A / PROTÉGÉ A	
PROTECTED B / PROTÉGÉ B	✓	NATO RESTRICTED / NATO DIFFUSION RESTREINTE		PROTECTED B / PROTÉGÉ B	
PROTECTED C / PROTÉGÉ C		NATO CONFIDENTIAL / NATO CONFIDENTIEL		PROTECTED C / PROTÉGÉ C	
CONFIDENTIAL / CONFIDENTIEL		NATO SECRET / NATO SECRET		CONFIDENTIAL / CONFIDENTIEL	
SECRET / SECRET		COSMIC TOP SECRET / COSMIC TRÈS SECRET		SECRET / SECRET	
TOP SECRET / TRÈS SECRET				TOP SECRET / TRÈS SECRET	
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT)				TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT)	

Security Classification / Classification de sécurité
Unclassified

Canadä

Contract Number / Numéro du contrat

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Unclassified

PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS?
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité : — ☑ No / Non ☐ Yes / Oui

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? — ☑ No / Non ☐ Yes / Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel :
Document Number / Numéro du document :

PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

☑ RELIABILITY STATUS COTE DE FIABILITÉ ☐ CONFIDENTIAL CONFIDENTIEL ☐ SECRET SECRET ☐ TOP SECRET TRÈS SECRET

☐ TOP SECRET– SIGINT TRÈS SECRET – SIGINT ☐ NATO CONFIDENTIAL NATO CONFIDENTIEL ☐ NATO SECRET NATO SECRET ☐ COSMIC TOP SECRET COSMIC TRÈS SECRET

☐ SITE ACCESS ACCÈS AUX EMPLACEMENTS

Special comments:
Commentaires spéciaux : _____

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.
REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? — ☐ No / Non ☑ Yes / Oui

If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté? — ☐ No / Non ☑ Yes / Oui

PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?
Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS? — ☐ No / Non ☑ Yes / Oui

11. b) Will the supplier be required to safeguard COMSEC information or assets?
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC? — ☑ No / Non ☐ Yes / Oui

PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?
Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ? — ☑ No / Non ☐ Yes / Oui

INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? — ☐ No / Non ☑ Yes / Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? — ☐ No / Non ☑ Yes / Oui

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité
Unclassified

Canadä

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Security Classification / Classification de sécurité
Unclassified

PART C - (continued) / PARTIE C - (suite)

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.
Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.
Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category Catégorie	PROTECTED PROTÉGÉ			CLASSIFIED CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET TRÈS SECRET	NATO RESTRICTED NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET COSMIC TRÈS SECRET	PROTECTED PROTÉGÉ A	B	C	CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET TRÈS SECRET
Information / Assets Renseignements / Biens		✓														
Production																
IT Media / Support TI		✓														
IT Link / Lien électronique		✓														

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? ✓ No / Non ☐ Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
Dans l'affirmative, classifier le présent formulaire en indiquant le niveau de sécurité dans la case intitulée
« Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE? ✓ No / Non ☐ Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
Dans l'affirmative, classifier le présent formulaire en indiquant le niveau de sécurité dans la case intitulée
« Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

Security Classification / Classification de sécurité
Unclassified

Canada

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The following clause is intended to be incorporated in any resulting contract.

SECURITY REQUIREMENT FOR CANADIAN SUPPLIER:
PWGSC FILE # 13-14706-0

1.   The Contractor must, at all times during the performance of the Contract, hold a valid Designated Organization Screening (DOS) with approved: Document Safeguarding at the level of PROTECTED B, issued by the Canadian Industrial Security Directorate, Public Works and Government Services Canada.

2.   The Contractor personnel requiring access to PROTECTED information, assets or work site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).

         Until the security screening of the Contractor personnel required by this Contract/Standing Offer has been completed satisfactorily by the Canadian Industrial Security Directorate, Public Works and Government Services Canada, the Contractor personnel **MAY NOT HAVE ACCESS** to PROTECTED information or assets, and **MAY NOT ENTER** sites where such information or assets are kept, without an escort.

3.   The Contractor MUST NOT utilize its Information Technology systems to electronically process, produce or store PROTECTED information until the CISD/PWGSC has issued written approval. After approval has been granted or approved, these tasks may be performed at the level of PROTECTED B, including an IT Link at the level of PROTECTED B.

4.   Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.

5.   The Contractor must comply with the provisions of the:

         (a)   Security Requirements Check List and security guide (if applicable), attached at Annex C;
         (b)   Industrial Security Manual (Latest Edition)

Solicitation No. - N° de l'invitation	Amd. No. - N° de la modif.	Buyer ID - Id de l'acheteur
10034679/A	Original	C71
Client Ref. No. - N° de réf. du client	File No. - N° du dossier	CCC No./N° CCC - FMS No./N° VM
RAS 13-14706		

La clause suivante est destiné à être incorporé dans un contrat qui en résulte.

EXIGENCE EN MATIÈRE DE SÉCURITÉ POUR ENTREPRENEUR CANADIEN: DOSSIER TPSGC No 13-14706-0

1. L'entrepreneur doit détenir en permanence, pendant l'exécution du contrat une attestation de vérification d'organisation désignée (VOD) en vigueur, ainsi qu'une:cote de protection des documents approuvée au niveau PROTÉGÉ B, délivrées par la Direction de la sécurité industrielle canadienne de Travaux publics et Services gouvernementaux Canada.

2. Les membres du personnel de l'entrepreneur devant avoir accès à des renseignements ou à des biens PROTÉGÉS, ou à des établissements de travail dont l'accès est réglementé, doivent TOUS détenir une cote de FIABILITÉ en vigueur, délivrée ou approuvée par la Direction de la sécurité industrielle canadienne (DSIC) de Travaux publics et Services gouvernementaux Canada (TPSGC).

    Tant que les autorisations de sécurité du personnel de l'entrepreneur requises au titre du présent contrat n'ont pas été émises par la Direction de la sécurité industrielle canadienne (DSIC), ces derniers **NE** peuvent **AVOIR ACCÈS** aux renseignements et/ou biens de nature délicate **PROTÉGÉS** de plus, ils **NE** peuvent **PAS PÉNÉTRER** sur les lieux où ces renseignements ou biens sont entreposés sans une escorte.

3. L'entrepreneur NE DOIT PAS utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données et(ou) de production au niveau PROTÉGÉ tant que la DSCI, TPSGC ne lui en aura pas donné l'autorisation par écrit. Lorsque cette autorisation aura été délivrée, ces tâches pourront être exécutées au niveau PROTÉGÉ B, compris un lien électronique au niveau PROTÉGÉ B.

4. Les contrats de sous-traitance comportant des exigences relatives à la sécurité NE doivent PAS être attribués sans l'autorisation écrite préalable de la DSIC de TPSGC.

5. L'entrepreneur doit se conformer aux dispositions des documents suivants :

    a) de la Liste de vérification des exigences relatives à la sécurité et directive de sécurité (s'il y a lieu), reproduite ci-joint à l'Annexe C;
    b) le *Manuel de la sécurité industrielle* (dernière édition).