



NOTICE OF PROCUREMENT PROPOSAL

The Canadian Transportation Agency (the Agency) invites you to submit a proposal for Design and Configuration of Microsoft Dynamics CRM. TBIPS RFP **Solicitation Number: 4111-15-0004**

As a result from this proposal call, the Agency intends to award **1 Contract to a maximum value of \$2M including all taxes.**

The Contract will be for a period of 2 years, plus 3 additional 1-year option periods (maximum total of 5 years).

Proposals must meet the requirements of the attached Instructions to bidders. Please ensure that your proposal is complete; it will be evaluated in accordance with the criteria described in the attached Evaluation criteria (Annex C).

The price(s) quoted in the financial proposal are to be expressed as a ceiling hourly rate(s) for the work described in **Annex A: Statement of work.**

The bidders must not introduce in their proposal cost elements which are not requested in this proposal call.

To be eligible, your technical proposal and your financial proposal (enclosed in a separate, sealed envelope) must be delivered to the following address, **on or before 2:00 pm, Eastern Standard Time (EST), December 16, 2014:**

Canadian Transportation Agency
c/o Canadian Heritage

2nd floor mailroom
15 Eddy Street
Gatineau, Quebec
J8X 4B3

ATTN: Line Brousseau and Cal
Johnston

Solicitation Number: 4111-15-
0004

TO BE OPENED BY
ADDRESSEE ONLY.

Any amendments to proposals must also be sent before the due date. Late proposals will be returned unopened to senders.

Proposals not submitted by mail or courier won't be accepted. However, proposals may be amended by email (line.brousseau@otc-cta.gc.ca) if such amendment is received prior to the closing date and time set herein for receipt of proposals.

No extension to the closing date and time for the receipt of proposals will be given unless the Department is responsible for an omission or an error in the tender documents significant enough in nature to warrant an extension of the bid closing date to allow bidders sufficient time to review their proposals. Bidders are therefore requested to submit, in writing, any technical-type questions concerning this proposal call at least 5 working days prior to the tender closing date.

Please note that the lowest priced, or any proposal, will not necessarily be accepted.

The following SA TBIPS suppliers from the search done November 29, 2014 have been invited:

Accenture Inc.
AZUR Human Resources Limited
BDO Dunwoody LLP
CGI Information Systems and Management Consultants Inc.
Coradix Technology Consulting Ltd.
Donna Cona Inc.
Emtec Infrastructure Services Canada Corporation
Evolving Web Inc.
Fujitsu Consulting (Canada) Inc.
14C Information Technology Consulting Inc.
IBM Canada Ltd.
IT Services Canada
Maplesoft Consulting Inc.
Nisha Technologies Inc., Contract Community Inc., In a Joint Venture
Olay Consulting Corp.
QMR Staffing Solutions Incorporated
Sierra Systems Group Inc.
Somos Consulting Group Inc.
The Halifax Group Inc.
Thinkwrap Solutions Inc.
Zylog Systems (Ottawa) Ltd.

To ensure the integrity of the competitive bid process, communications regarding the request for proposals (RFP) must be directed in writing only to:

Line Brousseau

Senior Procurement Officer

Chief Financial Officer Directorate

Canadian Transportation Agency

line.brousseau@otc-cta.gc.ca

Annex A - Design and Configuration of Microsoft Dynamics CRM

1. Background

Agency Background

- The Canadian Transportation Agency (the Agency) is an independent administrative body of the Government of Canada. It performs two key functions within the federal transportation system:
 - As a **quasi-judicial tribunal**, the Agency, informally and through formal adjudication, resolves a range of commercial and consumer transportation-related disputes, including accessibility issues for persons with disabilities. It operates like a court when adjudicating disputes.
 - As an **economic regulator**, the Agency makes determinations and issues authorities, licences and permits to transportation carriers under federal jurisdiction.
- The Agency has about 230 employees, almost all of them working in the same building in Gatineau, Quebec.
- Further background about Agency activities can be found in our latest [Annual Report](#).

Overview

In early 2014, the Agency launched a Business Process & Service Transformation (BPST) initiative. The main goal of this initiative is to move to a more client-centric business model as a result of improved processes, which will be enabled by effective information management technologies and a culture of continuous improvement.

Through the BPST initiative, the Agency will better deliver services and meet the needs of its clients through:

- reviewing processes to be as efficient and client-centric as possible;
- replacing the in-house case management system with Microsoft Dynamics CRM; and
- enhancing the website to provide interactive, online services for clients.

The Agency requires assistance with transforming business processes and implementing them into Microsoft Dynamics CRM.

2. Objectives and SCOPE

The scope provides a general idea of work planned over the next two years. Specific tasks will be approved by the Project Authority via task authorizations, as and when required.

High level objective: MS Dynamics CRM 2013 will replace the Agency's legacy case management system, ApplInfo, and enable the transformation of the services provided by the Agency to external clients and stakeholders. CRM will be fully integrated with the web and RDIMS. It will also enable the replacement of manual processes with automated ones wherever possible and feature a robust automated control framework consistent with delegated authorities.

The contractor will be responsible to:

Core Task

To implement 53 Agency business processes in MS Dynamics CRM 2013 within the next 2 years. These processes are currently mapped in Visio and detailed requirement specifications will be available for each process. The use case and test scenario documentation process is underway. By the time of the first Task Authorization, the high level data model, security model, baseline architecture and 2 business processes will have been developed and implemented in CRM. The contractor will take primary role in designing and building all components of the system, while closely working with the Technical Lead, Project Authority and BPST team members, providing support, training and guidance as needed.

Task authorizations will be structured around the following milestones. The order and division of work is preliminary - it will be refined over time to reflect the real quantity of work:

- a. General Case (4 processes)
- b. General Inquiries (1 process)
- c. Air Licensing (28 processes)
- d. Marine Coasting Trade (1 process)
- e. Complaints and Disputes (13 processes)
- f. Rail infrastructure (3 processes)
- g. Enforcement (3 processes)

Supplementary Tasks

1. **Data migration:** Lead legacy data migration, under the assumption that only essential data will be migrated into the new system. The Agency will determine which data is essential with the intent to minimize data migration. The Agency will be responsible for cleaning up all data to be migrated.
2. **Security and user management:** Design and implement a security framework to ensure only authorized users are able to access information within each process.
3. **Document management:** Integrate RDIMS with CRM and ensure that an efficient document management model is implemented to manage the document flow between RDIMS and CRM. The Agency is doing a proof of concept with SeeUnity for this integration and will assume the cost of middleware but may require assistance in extending the native integration of this product with CRM.
4. **Web Integration:** Guide a third party web developer to ensure a seamless integration and two-way flow of information between the website and CRM. The Agency website is built using Drupal 7 (currently WET 3.1, but may be upgraded to WET 4). The web interfaces will display certain types of CRM data on webpages as well as enable clients to process on-line transactions. The contractor will be responsible for setting up appropriate fields in CRM and providing hooks to the web developer to complete push and pull integration with the public web interface. The Agency is considering various middleware options and will assume the cost of middleware and provide assistance in deployment and configuration.
5. **MS Office Integration:** Integrate with MS Office products including Outlook, Word and Excel. The Outlook integration should be robust to allow CRM users to work directly in Outlook to manage correspondence and track cases.
6. **QA and QC:** Perform integration/functional, regression and system testing, and verify test results to ensure the highest level of quality and technical integrity before user testing is initiated. Provide assistance in the preparation of test scenarios and test cases. The Agency will play a role in quality testing through the involvement of Subject Matter Experts and Business Analysts.
7. **Training:** Train end users and administrators and provide training materials and instructional media. The contractor will lead individual and group training sessions with the help of the internal CRM team and internal change management specialist.
8. **CRM environment support:** Work closely with the internal CRM implementation team. The server infrastructure and CRM instance deployment will be managed by an internal IT team, but may require assistance from the Contractor.

9. **Documentation:** Thoroughly document all complex implementation points, issues and workarounds. The documentation should be sufficient to allow internal developers to fully take over CRM maintenance and issue resolution in the future.
10. **Multilingual Application:** Ensure the proper components are in place to provide a fully functional application in both English and French. The Agency will be responsible for providing French translations.
11. **User Help File:** Augment help files provided by Microsoft to provide information specific to the Agency's configuration of CRM. The Agency will be responsible for providing French translations.
12. **Business Transformation Advice and Guidance:** Provide advice and guidance on using an Agile development cycle for business transformation; provide advice and guidance on format and content of business requirements documents produced by the Agency (use case definition, test case definition, detailed requirements specifications). We expect this documentation to evolve as we implement each business process.

The Agency will be responsible for providing:

1. Access to business process experts, process owners and other staff as needed,
2. Optimized business process maps in Visio format,
3. High level functional data model,
4. Field-level schema,
5. Detailed requirements specifications for each process,
6. Use case documentation for each process,
7. Internal server environment,
8. French translations,
9. Deployed development, QA and production CRM instances, and
10. Office space, essential supplies, software and hardware.

3. REQUIRED RESOURCES

1. Two (2) ERP System Analysts Level 2 for MS Dynamics CRM possessing the following skillset:
 - Perform business analyses of requirements to identify information, procedures, and decision flows.
 - Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems.
 - Develop data dictionary.
 - Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems.
 - Prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes.
 - Translate business requirements into systems design and specifications.
 - Establish acceptance test criteria with client.
 - Develop the test strategy; test planning and coordination.
 - Manage and monitor test plans for all levels of testing.
 - Develop test scenarios and test scripts.
 - Establish and maintain test procedures and script libraries.
 - Establish a validation and verification capability which assumes functional and performance compliance.
2. Two (2) ERP Programmers/Technical Analysts Level 2 for MS Dynamics CRM
 - Analyses of functional requirements leading to the execution of the design, development and implementation of changes to the application.
 - Develop technical specifications for systems development, design and implementation

- Responsible for developing and maintaining configuration and programs based on approved requirements working both independently and within a team.
- Create and modify configuration and code for software as per technical specifications.
- Produce reports, manuals, programs, data files, and procedures for applications.
- Analyze and recommend alternatives and options for solutions.
- Analyze Code and objects to determine functional fit.
- Execute tasks related to the implementation of application and database design and fixes, coding and technical documentation.

3. One (1) Courseware Developer/Trainer

- Perform needs assessment/analysis for training purposes.
- Plan and monitor training projects.
- Perform job, task, and/or content analysis.
- Recommend instructional media and strategies.
- Develop training materials.
- Prepare end-users for implementation of courseware materials.
- Communicate effectively by visual, oral, and written form with individuals, small group, and in front of large audiences.
- Conduct training sessions in either official language.

4. SELECTION PROCESS

To be considered for the process, the bidder will have to meet all the mandatory criteria discussed in the evaluation matrix (Annex “B”) and earn at least 60% of the rated criteria. As part of the rated criteria, the bidder will be required to prepare and present a high-level project plan including time estimates, work breakdown structure and quality assurance and control approach. Only the plan itself will be rated, not the presentation. The project plan should not exceed 1000 words.

If the bidder meets mandatory criteria and earns at least 60% on the rated criteria the Agency will contact bidder’s references and ask the bidder to present their project plan and answer questions. The presentation will be scheduled during the evaluation phase. The bidder will make themselves available to present during the evaluation phase. The Agency will contact the bidder at least 2 business days in advance to arrange specific date and time for this presentation. This presentation must be done in person.

5. Technical Environment

Currently, the Agency uses an in-house case management software called ApplInfo. Documents are managed in RDIMS.

Secure file upload is managed via the Linoma GoAnywhere Director file transfer solution.

The Agency implemented an internal MS Dynamics development environment. All development will be conducted within this environment until a centralized Government of Canada hosting environment is ready.

The Agency website is built using Drupal 7 (currently WET 3.1 but may be migrated to WET 4). The website will be further enhanced using Drupal and potentially a middleware product for interactions between external users and MS Dynamics CRM.

6. Specifications and Standards

All work must be undertaken in compliance with the following policies, guidelines and directives, as and when applicable:

- Web Standards of the Government of Canada, including; Standards on Optimizing Websites and Application for Mobile Devices, Standards on Web Interoperability, Standards on Web Usability, Standards on Web Accessibility; and the Official Languages Act;
- Treasury Board of Canada Secretariat, Operational Security Standard - Management of Information Technology Security Standard (MITSS);
- Communications Security Establishment (CSE) IT Security Standards; and
- Harmonized Threat and Risk Assessment Methodology (HTRA) for the Government of Canada.

7. Language of Work

The working language of the project team will be English. The content and content administration of the Dynamics CRM will be done in both French and English.

8. Contractor's Obligations

Quality Control

The Agency places high value on quality assurance and control. The Contractor will assist in various testing phases required by the project, including but not limited to unit testing, system integration testing, performance and availability testing, troubleshooting and defect resolution.

All deliverables and services rendered under the Contract are subject to inspection by the Project Authority. The Project Authority has the right to reject any deliverables that are not considered satisfactory, or require their correction before payment will be authorized.

Reporting

The Contractor must provide a weekly status report electronically to the Project Authority outlining what work was undertaken during the reporting period, what work is still outstanding, and any issues or concerns that the resource wants to identify to the attention of the Project Authority.

Change Management

No increase in the total liability of the Agency or in the price of work resulting from any design changes, modifications or interpretations of specifications, made by the Contractor, will be authorized or paid to the Contractor unless such changes, modifications or interpretations, have been approved, in writing, by the Project Authority, prior to their incorporation into the Work. The Contractor should not be obliged to perform any work or provide any service that would cause the total liability of the Agency to be exceeded, unless an increase is authorized by the Project Authority.

On site work

The Contractor will come on site to work with Agency staff and to configure Agency infrastructure and Microsoft Dynamics CRM.

The Agency's regular working hours are Monday to Friday, 9 a.m. to 5 p.m. Eastern Time. The Contractor is expected to be capable of providing services within the regular working hours, as identified above, with occasional requirements for availability to provide services outside the regular working hours, as required to support planned system upgrades or required system maintenance.

Courteous behaviour

The Agency strives to maintain a courteous and respectful work environment in line with public service values and ethics. The Contractor will be expected to respect the spirit of these values at all times. Failure to do so may constitute a motive for contract termination.

9. Agency's Obligations

The Agency will provide to the Contractor:

1. Access to the Agency Project Authority who will be responsible for coordinating the overall project, providing as-required direction and guidance to the Contractor, and accepting and approving Contractor deliverables on behalf of the Agency.
2. Logistical support:
 - a. Access to the appropriate subject matter experts from within the Agency as required.
 - b. Access to ApplInfo (legacy case management system), Microsoft Dynamics CRM, and all other associated IT infrastructure.
3. Comments on submitted deliverables within seven (7) working days.
4. Other assistance, support and background information as required.

10. Location of Work and Travel

Upon request, company staff must be available to meet with Agency staff at the Agency offices within 2 working days. Companies must be in the National Capital Region or be willing to have staff available in the region for the duration of the contract. The Agency will not pay for any travel costs associated with meeting the requirements of this contract.

11. Security

Contractors must possess an enhanced reliability security clearance.

12. Project Authority to be given upon contract award

The Project Authority is responsible for the management of the contract and will be the point of contact or reference for the Contractor: