

RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:
Bid Receiving - PWGSC / Réception des soumissions
- TPSGC
11 Laurier St./11, rue Laurier
Place du Portage, Phase III
Core 0B2 / Noyau 0B2
Gatineau
Québec
K1A 0S5
Bid Fax: (819) 997-9776

SOLICITATION AMENDMENT
MODIFICATION DE L'INVITATION

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

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

Comments - Commentaires

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

Issuing Office - Bureau de distribution
Alternative Service Delivery/Autres modes de
prestation des services
11 Laurier/11 rue Laurier
7B3, Place du Portage Phase III
Gatineau
Québec
K1A 0S5

Title - Sujet CRMIS INDUSTRY ENGAGEMENT	
Solicitation No. - N° de l'invitation 5P032-150035/B	Amendment No. - N° modif. 001
Client Reference No. - N° de référence du client 5P032-150035	Date 2015-10-15
GETS Reference No. - N° de référence de SEAG PW-\$PSD-003-25403	
File No. - N° de dossier 003psd.5P032-150035	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2015-11-13	
Time Zone Fuseau horaire Eastern Standard Time EST	
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Henderson, Anthony	Buyer Id - Id de l'acheteur 003psd
Telephone No. - N° de téléphone (819) 420-2980 ()	FAX No. - N° de FAX (819) 956-4944
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction:	

Instructions: See Herein

Instructions: Voir aux présentes

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

Solicitation No. - N° de l'invitation

5P032-150035/B

Amd. No. - N° de la modif.

001

Buyer ID - Id de l'acheteur

003psd

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

5P032-150035

File No. - N° du dossier

003psd5P032-150035

CCC No./N° CCC - FMS No/ N° VME

This amendment has been issued to include the New Engagement Process and Bidder's instructions.

Letter of Interest

This Letter of Interest (LOI) does not constitute a commitment by the Government of Canada. The Government of Canada does not intend to award a contract on the basis of this notice or otherwise pay for the information solicited.

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- Annex B Industry Engagement Proposed Topics for Discussion
- Annex C Request for Information (RFI)

1.0 NEW ENGAGEMENT PROCESS

- a. In order to ensure a successful procurement of a Commercial Off the Shelf (COTS) software and Professional Services for the Cultural Resource Management Information System (CRMIS), Industry shall be engaged in an engagement process as the first step in this solicitation. The engagement process includes an “Industry Engagement Session” followed by “One-on-One Industry Meetings” and Industry “Working Group Meetings” if necessary, followed by the conventional Request for Proposal (RFP) process.
- b. The schedule for the Industry Engagement Session is estimated for November 5, 2015 from 9:00 am to 12:00 pm at Parks Canada in a place TBD. One-on-one Industry Meetings may follow this session, if required.
- c. If required, Working Group Meetings may be scheduled to take place in November 2015.
- d. It is desirable that Industry provide comments and recommendations to the Public Works Government Services Canada (PWGSC) Contracting Authority on Annex A, Industry Engagement, by 4 pm on October 30, 2015 to allow Canada to prepare for the One-on-One sessions. The Draft Rules of Engagement and Dispute Resolution Process, as described in Annex A, will be discussed and finalized at the Industry Engagement Session.
- e. To participate in the Engagement process, including the Industry Engagement Session, one-on-one meetings, Working Group Meetings and a review of the final draft RFP, Industry must sign and agree to the Industry Engagement – “Rules of Engagement and Dispute Resolution Process” which is attached at Annex A and will be presented at the Industry Engagement Session.
- f. Also, in order to facilitate the one-on-one meetings, Industry is encouraged to provide written comments and recommendations on the proposed topics outlined in Annex B, Proposed Topics for

Discussion and Annex C, Request for Information (RFI), as part of their response to this Letter of Interest, for discussion as well as any additional topics Industry may wish to discuss.

g. All Industry engagements will be documented and this information is subject to the Access to Information Act. Canada shall not reveal any designated proprietary information to third parties.

h. Industry Engagement Session: The purpose of the Industry Engagement Session is to provide Industry and other interested parties with general information on the project, procurement and engagement process, finalize the Draft Rules of Engagement in Annex A and obtain industry's comments on the engagement process timeline.

i. One-on-One Industry Meetings (if required): Following sign off by Industry of the Rules of Engagement and Dispute Resolution Process, Canada will meet with Industry participants individually to listen to their concerns, recommendations and solutions. Canada will analyze and summarize industry input, identify topics that need to be discussed at Working Group meetings and revise solicitation document(s), if applicable.

j. Working Group Meetings (if required): The objective of the Working Group Meetings is to resolve industry issues and secure an open competitive procurement process. Industry will be invited to Working Group Meetings comprised of representatives from Parks Canada and PWGSC to discuss specific issues, potential solutions and revised solicitation document(s), if applicable. Canada will finalize the solicitation document(s) following these meetings.

k. Draft RFP (if necessary): Following the Working Group Meetings, Canada will document all industry issues, positions and actions. A draft RFP will only be made available to all participants who have signed and complied with the Rules of Engagement for a final review before the official RFP is published on Buy and Sell.

l. Third Party Consultation: Third parties such as Industry Associations will be consulted on an as and when required basis to discuss industry issues and recommendations on industry standard practices.

m. The Letter of Interest (LOI) Closing Date: The LOI closing date described in Item 7, Estimated Procurement Schedule, is not the deadline for comments or inputs. The purpose of industry engagement is to accept inputs and comments at any time up until the formal Request for Proposal (RFP) is posted.

2.0 SCOPE

Parks Canada

Cultural Resource Management Information System (CRMIS) Project

Parks Canada is realigning its various and disparate cultural resource information systems into one standardized national system to be accessed by employees across the country. Furthermore, this is an opportunity to create an efficient and effective tool for reporting and decision making.

Parks Canada is looking for a Commercial Off-the-Shelf (COTS) product which is SPECTRUM compliant and specializes in cultural resource management. A major consideration for the success of the Cultural Resource Management Information System (CRMIS) is that it effectively supports functional areas in managing cultural resources. In so doing, CRMIS elements will constitute a single, authoritative

information source for cultural resource management including: Ideally the solution would allow Parks Canada to consolidate the following systems:

- Archaeological site and heritage place management
- Historic object management
- Archaeological artifact management
- Collections management
- Conservation management

Objectives

- Optimize and streamline Parks Canada's disparate systems that hold heritage conservation information, enabling Parks Canada to more effectively and efficiently manage its heritage places and objects.
- Support collaboration with field units, parks and sites in relation to Heritage Conservation, Visitor Experience and External Relations projects.
- Centralize and replace current information systems that are not functional or at end of life. Only core information will be retained. This is in line with the amalgamation at National Office of the cultural resource management function within Parks Canada.
- Safeguard Heritage Conservation corporate knowledge representing over 40 years of investment by Parks Canada.
- Demonstrate to Treasury Board and the Office of the Auditor General that Parks Canada is working towards fulfilling its information management obligations related to historic sites and collections management.

Provide access to Parks Canada staff, researchers, cultural organizations and institutions, stakeholders and the public to Parks Canada information on heritage places and objects.

3.0 CONTRACTING AUTHORITY

PWGSC Contracting Authority:
Anthony Henderson
Public Works and Government Services Canada
Alternate Service Delivery (ASD) and Special Projects
E-mail: anthony.henderson@pwgsc-tpsgc.gc.ca
Tel. No.: (819) 420-2980

4.0 COMMUNICATIONS

All enquiries and other communications with government officials throughout the solicitation period are to be directed ONLY to the Contracting Authority named above who is responsible for the oversight of the solicitation process. Non-compliance with this condition during the solicitation period may (for that reason alone) result in disqualification of a bidder from the Engagement process.

5.0 INDUSTRY ENGAGEMENT: REGISTRATION

Participants who wish to attend the Industry Engagement Session and Industry One-on-One sessions **are to register in writing by notifying the PWGSC Contracting Authority identified herein via email, by 4 pm EDT, October 30, 2015.** Participants must identify themselves by their legal name, corporate address, the names of representatives attending by their respective title as well as their office address, telephone number(s) and e-mail address.

Please note that:

- a. Although Industry may register as many representatives as required no more than two (2) representatives may attend at any given time due to space limitation.
- b. All attendees have to register in advance with the Contract Authority and will be required to sign-in upon arrival at the venue for security reasons. In addition, please indicate whether a one-on-one session is requested in addition to the Industry Engagement Session.
- c. Interested participants are encouraged to submit their comments, in writing, to the Contracting Authority in regards to the “Industry Engagement Proposed Topics for Discussion” form attached at Annex “B” as well as to suggest additional topics to be discussed at the industry engagement session, one-on-one meetings and working group sessions.
- d. One-on-one sessions will be conducted over a number of days following the Industry Engagement Session. The Contracting Officer will notify you of your designated meeting time. Allotted times will be established on a first-come-first serve basis based on when the registration is received.
- e. One-on-One Sessions will be a maximum of 1 hour in length.
- f. Attendees are responsible for their own transportation, accommodation, meals, parking and all other expenses.
- g. Participation is not a mandatory requirement. For example, choosing not to attend any of the Engagement Sessions will not preclude an interested participant from submitting a formal proposal.
- h. Media cannot participate in the Industry Engagement Session, one-on-one meetings or the working group sessions.
- i. It is requested that participants attending the Industry Engagement Session arrive no later than 09:45 am the day of the session.

6.0 INDUSTRY ENGAGEMENT SESSION AGENDA, November 5, 2015

The following is the proposed Agenda/Format for the Industry Engagement Session:

- a. Opening Remarks: PWGSC/Parks Canada
- b. Engagement Process Agenda & Overview PWGSC
- c. Rules of Engagement PWGSC
- d. Project Overview Parks Canada
- e. Project Next Steps Parks Canada
- f. RFI Overview Parks Canada/PWGSC
- g. Questions and Answers ALL

h. Closing Remarks Parks Canada/PWGSC

7.0 ESTIMATED PROCUREMENT SCHEDULE

- 1.0 Letter of Interest published on Buy and Sell Canada September 28, 2015
- 2.0 Industry Engagement Session – November 5, 2015
- 3.0 RFI Response Deadline – October 30th, 2015
- 4.0 One on One sessions and Working Group sessions – November 15-16, 2015
- 5.0 SOW and RFP Complete and Approved – December 1, 2015
- 6.0 RFP Released on Buy and Sell Canada – December 15, 2015
- 7.0 RFP Closes – January 29, 2016
- 8.0 Product Demonstration – February 5-6, 2016
- 9.0 Contract award – March 20, 2016
- 10.0 Delivery –March 30, 2016
- 11.0 Implementation – April 2016

ANNEX A

INDUSTRY ENGAGEMENT PROCESS

Rules of Engagement

The Draft Terms & Conditions and Dispute Resolution Process of the Rules of Engagement will be discussed and finalized at the Industry Engagement Session. Sign off by participants will be required in order to attend the One-on-One and Working Group meetings.

- 1) An overriding principle of the industry engagement is that it be conducted with the utmost of fairness and equity between all parties. No one person or organization shall receive nor be perceived to have received any unusual or unfair advantage over the others.
- 2) These Rules of Engagement will apply beginning with the signing of this document and conclude with the release of the final Request for Proposal (RFP) on Buy and Sell.
- 3) All Crown documentation provided throughout the industry engagement process, which begins with the Industry Engagement Session and concludes when the official Request for Proposal is published on the Government Electronic Tendering Service (Buy and Sell), will be provided to all participants who have agreed to and signed the Rules of Engagement (“Participant”).
- 4) The Engagement Process will consist of an Industry Engagement Session, Industry Meetings, Working Group Sessions and any other processes deemed necessary by the Contracting Authority.
- 5) The Principal Elements of the Proposed Topics and Questions for Discussion document at Annex B is the basis to move forward with the Engagement Process.
- 6) In order to maximize the benefits of the Engagement Process, Canada will endeavor to solicit comments from Participants on various issues raised.
- 7) Any solutions, ideas or issues raised during the One-on-One sessions will be first analyzed for further consideration by Canada;
- 8) Any issues, recommendations, solutions or ideas raised during the One-on-One meetings and accepted by Canada, shall be raised for discussion during the Working Group Sessions;
- 9) An agenda with discussion topics and any available supporting documentation will be provided to Participants in advance of each Working Group Session;
- 10) Following each Working Group Session, a Record of Discussion will be distributed to all Participants.
- 11) If required, a draft RFP for a final review before the official RFP is published on Buy and Sell will only be made available to Participants.
- 12) Canada will not disclose proprietary or commercially sensitive information concerning a Participant to other Participants or third parties, except and only to the extent required by law.

Terms and Conditions

The following terms and conditions apply to the Engagement Process. In order to encourage open dialogue, Participants agree to the following:

- 1) Participants are expected to discuss their views concerning Parks Canada's CRMIS and the Statement of Work, and to provide positive resolutions to the issues in question. Everyone shall have equal opportunity to share their ideas and suggestions;
- 2) Participants will NOT reveal or discuss any information to the MEDIA/NEWSPAPER regarding this requirement during this engagement process. If participants receive a question from the Media, participants are to direct the Media to contact the PWGSC Media Relations Office at 819-956-2313;
- 3) Participants are to direct inquiries and comments only to authorized representatives of Canada, as directed in notices given by the Contracting Authority from time to time. Any communication to unauthorized representatives of Canada may be subject to full disclosure by Canada on Buy and Sell;
- 4) Media cannot participate in the engagement session, one-on-one meetings or the working group sessions;
- 5) Canada is not obligated to issue any RFP, or to negotiate any contract for the CRMIS.
- 6) If Canada does release a RFP, the terms and conditions of the RFP shall be subject to Canada's absolute discretion;
- 7) Canada will not reimburse any person or entity for any cost incurred in participating in this industry engagement process;
- 8) Participation is not a mandatory requirement. Not participating in this engagement process will not preclude a bidder from submitting a proposal.
- 9) If required, a Draft RFP will be released to all Participants for comments. If required, a Working Group Session will be organized;
- 10) Failure to agree to and sign the Rules of Engagement will result in the exclusion from participation in the one-on-one meetings, working group meetings and review of the final draft RFP; and,
- 11) A dispute resolution process to manage impasses throughout this engagement process shall be adhered to as follows. All requests to use the dispute resolution process shall be directed to the Contracting Authority who will make the appropriate arrangements.
- 12) During the engagement process, documentation may be presented in either official language depending on availability. Documentation will not necessarily be translated.

Dispute Resolution Process

1) By informal discussion and good faith negotiation, each of the parties shall make all reasonable efforts to resolve any dispute, controversy or claim arising out of or in any way connected with this Industry Engagement.

2) Any dispute between the Parties of any nature arising out of or in connection with this Industry Engagement shall be resolved by the following process:

a. Any such dispute shall first be referred to the Participant’s Manager and the PWGSC Manager managing the Industry Engagement. The parties will have 3 Business Days in which to resolve the dispute.

b. In the event the representatives of the Parties specified Article 2.a. above are unable to resolve the dispute, it shall be referred to the Participant’s Project Director and the PWGSC Senior Director of the Division responsible to manage the Industry Engagement. The parties will have 3 Business Days to resolve the dispute.

c. In the event the representatives of the Parties specified in Article 2.b. above are unable to resolve the dispute, it shall be referred to the Participant’s Senior Representative responsible for this project and the PWGSC Director General, who will have 3 Business Days to resolve the dispute.

d. In the event the representatives of the Parties specified in Article 2.c. above are unable to resolve the dispute, it shall be referred to the Participant’s CEO and the PWGSC Assistant Deputy Minister, Acquisitions Branch who will have 5 Business Days to resolve the dispute.

e. In the event the representatives of the Parties specified in Article 2.d. above are unable to resolve the dispute, the Contracting Authority shall within 5 Business Days render a written decision which decision shall include a detailed description of the dispute and the reasons supporting the Contracting Authority's decision.

The Contracting Authority shall deliver a signed copy thereof to the Participant.

By signing this document, the individual represents that he/she has full authority to bind the company listed below and that the individual and the company agree to be bound by all the terms and conditions contained herein.

Name of Company: _____

Name and Title of Company Individual: _____

Signature: _____ Date: _____

PWGSC Contracting Authority:

Anthony Henderson

Signature: _____ Date: _____

Parks Canada Project Authority: _____

Signature: _____ Date: _____

ANNEX B

INDUSTRY ENGAGEMENT PROPOSED TOPICS FOR DISCUSSION

This template is being provided to assist Industry and Canada to prepare for the Industry Engagement Session, One-on-One Meetings and Working Group Meetings and to facilitate the engagement process. Your written response to the Annex C and additional topics are encouraged.

Header Information in Company's format

Industry Engagement

Proposed Discussion Topics

DATE

Company ABC Response

On this title page, please provide:

Company Information (Company Name, Address, Web address, etc.)

Contact Information (Name, Title, Phone, E-mail Address)

Document Protection Level (Optional)

Footer Information in Company's format Page X of X

The intent of this document is to present possible topics for discussion to promote open dialogue while working in collaboration with Industry in the development and costing of feasible solution options. This collection of topics is by no means exhaustive and Canada encourages participants to bring forward any other key issues that they consider to be relevant.

Consideration of and responses to this document will play an important role in this engagement process by fostering open discussion.

Initiatives that fall within the scope of the requirement are encouraged and are open to discussion during the One-on-One and Working Group sessions if necessary.

Instructions:

This document template is intended to provide guidance to Industry in preparing for the Industry Engagement Session, One-on-One meetings, Working Groups, and their discussion papers. It is not expected that all questions will elicit a response; neither should submissions be constrained by the questions or topics of discussion;

Use the written format of your choice, but keep the same section numbering to facilitate Canada's analysis of all responses;

The number of pages of your response is not limited. However the expected length should not exceed 30 pages single sided standard business format.;

Written responses are to be provided electronically in MS Word or PDF format.

Section 1: Executive Summary

- 1) Describe if you intend, should you bid on this requirement, to be the prime contractor or a potential subcontractor or whether a joint venture.
- 2) What services or products are you currently providing that are similar to this requirement?
- 3) Outline your suitability for the CRMIS Project.
- 4) Outline your key assumptions, constraints, conclusions and recommendations.
- 5) Up to a maximum of four (4) pages for the Executive Summary. Use the other Sections to provide details.

Section 2: RFI

Please answer questions on Annex C - RFI.

Section 3: Other Comments

- 1) Indicate any other areas of concern that Canada may be interested / concerned with that would aid in providing a recommendation for improvement.
- 2) Are there any other key issues that you consider relevant?
- 3) What would you consider to be the minimum qualifications required for a company to participate in this Project?
- 4) What established partnerships do you have with other industries, if any, that would be of benefit to the development of the CRMIS solution?

ANNEX C

STATEMENT OF WORK (or Requirement)

Questions to the Industry

#	Question
1	Is the format of the Statement of Work easy to understand? Should any sections be clarified?
2	The Government of Canada has very strict language rules. All systems, their associated documentation and interfaces must be bilingual in French and English. Will this requirement create any issues?
3	Would you prefer working with Parks Canada in English or French?
4	Parks Canada is considering using one of two approaches for contracting. The first approach would be a fixed price contract for the complete system as described in the Statement of Work. The second approach being considered is a hybrid. This approach would be a fixed price for the product, licensing, support and configuration. Task based authorization would be used for customization. Please provide your preference and comments on the matter.
5	<p>Are Parks Canada's requirements realistic for an out of the box solution based on the information provided for the items below as well as in general terms? If no, what level of effort would be required (high, medium, low) in terms of customization and/or configuration?</p> <ul style="list-style-type: none"> • General requirements and features • Collections – Historic objects • Collections - Archaeological artifacts • Conservation management • National Historic Site information
6	Is the Parks Canada archaeological provenience system clearly defined? Can your system align to the Parks Canada archaeological provenience system? Is this something that would require customization/configuration? If so, what level of effort would be required (high, medium, low)?
7	Based the information provided, can your software accommodate site information without customization/configuration (eg. Archaeological sites). If no, what level of effort would be required (high, medium, low)?
8	Does your product have GIS capacity?

9	Do you offer various licensing options? Do you have concurrent user licensing, flex licensing, server based licensing? Please explain your licensing options.
10	Based the information provided, will your proposed system be compliant to the Parks Canada technical environment? If not, what modifications would be required in our environment to allow your system to function?
11	Is your system compliant to Parks Canada Database requirements (MS SQL, Oracle, Self-contained)? If not, what modifications would be required on behalf of Parks Canada in order to allow your system to function?
12	Is digital asset management part of your system?
13	Does the information in the Data Dictionary example require further detail? If so, please explain.
14	Are the features requested in the product demonstration realistic? If not, please explain.
15	In order for the RFP to be effective and efficient, do you see any other concerns that have not been identified in this questionnaire? If so, please detail.