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**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**  
Business Management and Consulting Services  
Division / Division des services de gestion des affaires  
et de consultation  
11 Laurier St. / 11, rue Laurier  
10C1, Place du Portage  
Gatineau, Québec K1A 0S5

<b>Title - Sujet</b> RESOURCE ALIGNMENT REVIEW OF SSC	
<b>Solicitation No. - N° de l'invitation</b> 24062-170040/A	<b>Amendment No. - N° modif.</b> 003
<b>Client Reference No. - N° de référence du client</b> 24062-170040	<b>Date</b> 2016-07-12
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$ZG-423-30269	
<b>File No. - N° de dossier</b> 423zg.24062-170040	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2016-07-20</b>	<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Daylight Saving Time EDT
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input checked="" type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Lavergne, Ivan	<b>Buyer Id - Id de l'acheteur</b> 423zg
<b>Telephone No. - N° de téléphone</b> (873) 469-3959 ( )	<b>FAX No. - N° de FAX</b> (819) 956-2675
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b>	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

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

### Amendment 003

This solicitation amendment 003 is raised to answer Bidder's questions and to modify the Request for Proposal 24062-170040/A.

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### IMPORTANT !

Canada is considering changes to the security requirements. Please see modified Answer to Question 4.

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### Modifications to the RFP

#### 1. In Amendment 002, Attachment 1 to Part 4, Technical Criteria

**Delete:** Point Rated Technical Requirement in its entirety

**Replace by:** Point Rated Requirement

#### Point Rated Technical Criteria

Bids which meet all the mandatory technical criteria will be evaluated and scored in accordance with the evaluation grid below. The bidder must clearly demonstrate how the proposal meets each rated requirement. Point-Rated technical criteria not addressed will be given a score of zero. Technical bids must receive a minimal score of 65 points. More precisely, bids not meeting the required minimum score for each rated requirements (R1, R2 and R3) will be declared non-responsive and will not be evaluated financially.

Item	Rated Requirements	Criteria Scoring	Maximum Score	Demonstrated Compliance
R1	<b>Expert Panel Experience:</b>		<i>A maximum of 35 points is available for R1.</i>  <i>A minimum score of 25 points is required.</i>	
	<b>R1-A: Demonstrated Senior Executive Experience:</b>	For each stated experience submitted for R1-A, the technical bid must include the names of the proposed panel members.	<i>A maximum of 20 points will be awarded for demonstration of the panel's</i>	

			<i>combined experience.</i>	
R1-A1: In leading (being accountable for) and delivering large-scale IT transformations.	<p>R1-A1 Instructions: In the technical bid, the Bidder must demonstrate the suitability of the proposed panel members by submitting:</p> <ul style="list-style-type: none"><li>• A profile of the individual proposed describing the transformation projects on which they acquired experience qualifying their proposed membership on the expert panel;</li><li>• A description and timeframe of each large-scale transformation project shown as (Month/year to Month/year)</li></ul>	<i>Bidders will either receive 7 points for combined experience between 5 to 10 years or 14 points for combined experience above 10 years.</i>		
R1-A2: With large-scale IT transformations from a non-IT background (e.g. business management, risk management, financial management).	<p>R1-A2 Instructions: In the technical bid, the Bidder must demonstrate the suitability of the proposed panel members by submitting:</p> <ul style="list-style-type: none"><li>• A profile of the individual proposed describing the transformation projects on which they acquired experience qualifying their proposed membership on the expert panel;</li><li>• A description and timeframe of each large-scale transformation project shown as (Month/year to Month/year)</li></ul>	<i>Bidders will receive 1 point for each year of combined experience over 10 years, to a maximum of 6 points.</i>		
<b>R1-B: Proposed Panel Member Demonstrated Experience in:</b>	<p>Additional points will be awarded for panel members who have shown thought leadership* through leading and delivering large-scale IT transformations using an innovative** approach. For each of the following three (3) components, the Bidder must describe the involvement of the proposed panel members.</p>	<p>Up to an additional 15 points will be awarded.</p>		

	<p>R1-B1: Generating new ideas and methods for completing large-scale IT transformations.</p>	<p>R1-B1 Instructions: In the technical bid, the Bidder must provide transformation projects experience on which innovative ideas were used and explain why it was innovative. The Bidder must identify which group*** the innovation falls within and why.</p> <p><i>1 point for each innovative idea, to a maximum of 2 points per panel member. A maximum of 5 points for R1-B1.</i></p>		
	<p>R1-B2: Implementing innovative solutions that have garnered at least 10% efficiencies as part of a large-scale IT transformation they led.</p>	<p>R1-B2 Instructions: The Bidder must demonstrate what the new idea or method was, why it was innovative and how its deployment was successful. The Bidder must provide the efficiency indicator(s) such as deployment of capital, problem resolution, service delivery cost and demonstrate it was achieved over an established baseline.</p> <p><i>1 point for each innovative idea which generated at least 10% efficiencies as part of a large scale IT transformation, a maximum of 2 points per panel member. A maximum of 5 points for R1-B2.</i></p>		
	<p>R1-B3: Creating a culture of service excellence as part of a large-scale IT transformation. Service Excellence is defined by a greater than 25% improvement in at least two of the following three criteria:</p> <ul style="list-style-type: none"> <li>- customer satisfaction,</li> <li>- average resolution time, or</li> <li>- employee productivity</li> </ul>	<p>R1-B3 Instructions: The bidder must demonstrate that the &gt;25% improvement was achieved over an established baseline. The Bidder must support each proposed transformation project by providing supporting materials such as customer satisfaction surveys, published articles, white papers, internal reports, written references from the Intellectual Property owner or previous employer.</p> <p><i>1 point for each example, a maximum of 2 points per panel member. A maximum of 5 points for R1-B3.</i></p>		

	<p>*Thought leadership is defined as informed opinion leaders and the go-to people in their field of expertise who are trusted sources to inspire people with innovative ideas, turn ideas into reality, and know and show how to replicate their success.</p> <p>**Innovative as defined by the Conference Board of Canada: the process through which economic and social value is extracted from knowledge through the generation, development, and implementation of ideas to produce new or improved strategies, capabilities, products, services, or processes.</p> <p>An idea will be identified as Innovative if the bidder can demonstrate that the idea was new to the sector where the innovation was applied. For example, if it had never been done in the financial sector before, but had been completed in another sector, like manufacturing, it will be counted as innovative.</p> <p>***Innovation Group.</p> <p>The Conference Board of Canada Categorizes innovation into 4 Innovation Groups. The bidder must demonstrate which group the innovation falls within and why.</p> <ul style="list-style-type: none"> <li>Radical Change to Products and Services</li> </ul> <p>Product Examples: Polaroid camera, laptop computer, Windows operating system, ATM machine</p> <p>Service Examples: The Internet, IBM one-stop tech service model, online shopping.</p> <ul style="list-style-type: none"> <li>Radical Change to Process</li> </ul> <p>Examples: Assembly line automobile production, Lean Manufacturing, a process for greatly reducing waste, Six Sigma, a process for radically reducing error rates.</p> <ul style="list-style-type: none"> <li>Incremental Improvement to Products or Services</li> </ul> <p>Product Examples: Microsoft's Windows 7, Apple's second generation iPad</p> <p>Service Examples: Online registration systems for post-secondary education courses, The spa as a one-stop source of beauty care, same-day dry cleaning.</p> <ul style="list-style-type: none"> <li>Incremental Improvement to Services.</li> </ul> <p>Examples: Adding technology to replace people in a section of the production cycle, Reducing water usage in the production of food, "De-layering" management levels to bring decision-makers closer to operations and customers</p>			
R2	<p><b>Team of Resources</b></p> <p>The CV of each of the proposed resources should include work experience in the form of specific projects that demonstrates the suitability of the proposed resource for their identified role in the proposed team.</p> <p>For each project, the Bidder should provide:</p> <ul style="list-style-type: none"> <li>details as to where, when, and how the stated experience was obtained;</li> </ul>	<p>20 points maximum will be awarded for demonstration that the core team have each of the following:</p> <ul style="list-style-type: none"> <li>number of projects led and completed (i.e. end –to-end) by the Project Leader and back-up for reviews of this nature and scope</li> </ul> <p><i>1 point for each project, to a maximum of 4 points for the Project Leader and a maximum of 2 points for the back-up.</i></p> <ul style="list-style-type: none"> <li>number of projects led and completed (i.e. end –to-end) by the Project Leader and back-up</li> </ul>	<p>Maximum score is 20 points.</p> <p>Only bidders scoring a minimum of 14 points will be considered.</p>	

	<ul style="list-style-type: none"> <li>company or organization name and client contact information;</li> <li>project name, project duration (from-to dates)</li> </ul>	<p>for IT-related reviews of this nature and scope</p> <p><i>1 point for each project, to a maximum of 4 points for the Project Leader and a maximum of 2 points for the back-up.</i></p> <ul style="list-style-type: none"> <li>relevant experience of remainder of resources proposed for Independent Review Team of this nature and scope</li> </ul> <p><i>1 point for each project, to a maximum of 8 points.</i></p>		
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Item	Rated Requirements	Criteria Scoring	Maximum Score	Demonstrated Compliance
R3	<p><b>A Methodology and Work Plan, which includes the following areas:</b></p> <ul style="list-style-type: none"> <li>- Methodology</li> <li>- Data Management</li> <li>- Risk Management and Quality Management</li> <li>- Project Plan</li> </ul>	<p><b>Methodology:</b></p> <p>In the technical bid, the Bidder's proposed methodology must demonstrate how they incorporate best practices and lessons learned from their past experience conducting reviews of this scope. The Bidder's plan must demonstrate adaptability in their approach to working with multiple stakeholders (e.g. senior-level executives, Expert Panel members), and examples are provided. <i>Up to 10 points.</i></p> <p><b>Data Management:</b></p> <p>In the technical bid, the Bidder must outline their data management plan, including access to an extensive repository of experiences and analysis or knowledge databases or experts, and lessons learned on IT transformations and IT shared services consolidation. <i>Up to 15 points.</i></p> <p><b>Risk Management and Quality Management:</b></p> <p>In the technical bid, the Bidder must demonstrate the inclusion of quality control measures and should provide the Contracting Authority with a quality management plan for this Review. The Bidder should demonstrate its methodology and tools for identifying and assessing risks and how risk control action will be developed and implemented. <i>Up to 5 points.</i></p> <p><b>Project Plan:</b></p> <p>In the technical bid, the Bidder must provide a preliminary project management plan in line with the timelines described in the SOW. <i>Up to 5 points.</i></p> <p>Each of the four sections listed above will be evaluated according to the scores adjacent. The results of each rated</p>	<p>Maximum score is 35 points.</p> <p>Only bidders scoring a minimum of 26 points will be considered</p>	

Item	Rated Requirements	Criteria Scoring	Maximum Score	Demonstrated Compliance
		subsection will be summed for the total points out of 35.		
	<p>The Methodology and Work Plan (R3), submitted by the Bidders, will be evaluated against the following grid.</p> <p><b>100%</b> The Methodology and Work Plan has been adapted for and addresses the GC context and demonstrates a thorough, complete, and well-presented document with clear details including well-established and proven approaches; adaptability in working with multiple stakeholders; a clear strategy to leverage industry knowledge, access to expert analysis or analysts on enterprise IT transformations; clearly identified risks with impacts, probability and mitigation strategies; a comprehensive quality management plan; a detailed schedule with tasks assigned to identified resources, communication plan, financial management plan, resource and procurement plan; and examples are provided.</p> <p><b>80%</b> The Methodology and Work Plan demonstrates a thorough, complete, and well-presented document with clear details including well-established and proven approaches; adaptability in working with multiple stakeholders; a clear strategy to leverage industry knowledge, access to expert analysis or analysts on enterprise IT transformations; clearly identified risks with impacts, probability and mitigation strategies; a comprehensive quality management plan; a detailed schedule with tasks assigned to identified resources, communication plan, financial management plan, resource and procurement plan; and examples are provided.</p> <p><b>60%</b> The Methodology and Work Plan demonstrates a well-presented document with details including proven approaches; adaptability in working with multiple stakeholders; a data management strategy; clearly identified risks with mitigation strategies; a quality management plan; tasks assigned to identified resources, a communication plan, a financial management plan, a resource and procurement plan; and examples are provided.</p> <p><b>40%</b> The Methodology and Work Plan demonstrates a document with half the details requiring further clarification; a data management strategy; identified risks and mitigation strategies; a quality management plan; tasks and assignment to resources, a communication plan, a financial management plan, a resource and procurement plan.<b>20%</b> The Methodology and Work Plan demonstrates a document with more than half of the details requiring further clarification; a data management strategy; identified risks and mitigation strategies; a quality management plan; tasks and assignment to resources, a communication plan, a financial management plan, a resource and procurement plan.</p>			



## 2. In the RFP, Part 4 – Evaluation Procedures and Basis of Selection

**Delete:** Section 4.2.1.3 in its entirety

**Replace by:** Section 4.2.1.3

The pricing score (PSi) will be determined as follows: for each technically responsive bid (i) in the median range, the price of the lowest responsive bid (i) will be divided by the price of the evaluated bid to obtain a score between 0 and 10. Pi is the evaluated price (P) of each technically responsive bid (i). All bids within the median range, as determined as such (Median -30% and Median +40%), will be evaluated based on the Lowest Price within the Median Range (LPMR). A bid with a total evaluated price which falls outside of the median range will be given a score of 0.

### Bidders' Questions

**For more clarity, some answers published in Amendment 002 have been modified. These answers have been highlighted for your convenience.**

QUESTIONS	ANSWERS
1. Team evaluation - How will core team members be evaluated?	The Review Team will be evaluated in accordance with the criteria, as described, under Mandatory Requirement M2 (on page 19) and Rated Requirement R2 (on page 22) of the RFP.
2. Approach evaluation - How will the approach be evaluated?	The bidder's approach will be evaluated in accordance with the criteria, as stated, in Attachment 1 to Part 4, Technical Criteria, Rated Requirement R3.
3. Independence - Will vendors with a substantial business relationship with SSC be permitted to bid? An independent assessment of SSC performance would be impossible if the vendor has had a substantive role that has contributed to SSC strategy, architecture, legacy operations of their transformation agenda.	Canada is not prohibiting firms "with a substantial business relationship with SSC" from bidding on this contract. With regards to independence, Canada refers to Page 40 of the RFP, "the Contractor must convene a panel of prominent IT professionals (Expert Panel) to provide direction on the Independent Review by identifying key areas of focus, challenging and enhancing the Contractor's findings and deliverables." GC also refers to pages 41, 49 and 19 of the RFP, the latter of which states that the members of the Expert Panel must not be currently employed by the Bidder.
4. Security clearance – Clarify the requirements for vendors.	The original security requirement was Secret for the firm, review team and the expert panel. In Amendment 002, Canada modified the security requirement for the expert panel to Reliability. In this Amendment 003, Canada is

QUESTIONS	ANSWERS
	now considering a change to the security requirements to Reliability Status for the firm and core team members and no classification for the expert panel members.
<b>5.</b> The Crown defines a large-scale IT project as “* A large-scale IT project is defined as a project in government or industry valued at over \$100M.” Would the assessment of a \$1B outsourcing engagement qualify?	Yes, this would be acceptable.
<b>6.</b> Is the winning firm conflicted out from any downstream opportunities that may arise from the results of the Resource Alignment Review of Shared Services Canada (SSC), either with TBS or SSC?	No, Canada does not see any conflicts for any downstream opportunities in the future.
<b>7.</b> Given a number of firms are currently or have been providing SSC with strategic advice and guidance related to the delivery of modernizing IT, organization alignment, and infrastructure services, is it reasonable to assume they will be prohibited from bidding to ensure TBS receives a fresh and unbiased review?	No, Canada is not prohibiting any firms from bidding on this contract.
<b>8.</b> Will the successful bidder be restricted or prohibited for bidding any future staffing requirements or Projects from SSC?	Please see answer to question 6.
<b>9.</b> TBS is seeking an independent review of SSC which will inform the Government of Canada's way forward for the delivery of modernized IT infrastructure Services. We request clarification and a definition of "independence" given that: i) SSC has engaged service providers including systems integrators, consultants and staff augmentation firms to deliver current capabilities and advise on future plans ii) Over the duration (first year and potential optional year) of the independent review SSC is expected to seek services to deliver on various initiatives.	Please see answer to question 3.
<b>10.</b> TBS seeks an expert panel of 3-5 senior-level executives with a combination of public and private sector experiences from an IT and non-IT background, as well as Canadian and international experience. To provide TBS with an Expert Panel with truly international experience we request clarification to confirm the security requirements	Please see answer to question 4.

QUESTIONS	ANSWERS
for the Expert Panel. E.g. will the expert panel resources require access to classified information and therefore require Secret level security?	
<b>11.</b> We request the Crown to clarify the Security clearance requirements of the team members and the expert panel.	Please see answer to question 4.
<b>12.</b> How are the transitions being planned, grouped and prioritized?	In an effort to provide you an answer, Canada would like to have further clarification on this question.
<b>13.</b> The focus of the review is on the Infrastructure ... is there a possibility there will be a task for the "Business Value" review to be performed by the partner departments, so that the partner department is not just trying to blindly move the applications?	For more clarity, please see Annex A, Statement of Work.
<b>14.</b> Will there be a migration factory process to migrate similar applications and databases?	For more clarity, please see Annex A, Statement of Work.
<b>15.</b> Will there be recruitment of or incentives to SMEs (Small & Medium Enterprises) to engage in the process? The Matthew Hancock story from the Government of the UK is about the 400 days project to convert the 25 top front facing applications. They added SMEs to get the talent and agility to the project. Links for the references can be supplied.	The RFP is open to all companies that can meet the requirements. Companies can choose to bid on their own or through joint ventures, as stated on page 14 of the RFP.
<b>16.</b> The Workload Intake Form (WIF) is too complicated and needs to be streamlined. Is this process documented so that partner departments or their contractors can learn about the details?	For more clarity, please see Annex A, Statement of Work.
<b>17.</b> Will there be a reception center in SSC where experienced persons can walk the partner representatives through the process. This will reduce confusion and stress that will streamline the process.	For more clarity, please see Annex A, Statement of Work.
<b>18.</b> Will there be a focus to the key Applications and digitize access to the citizens? "Digital advocates" in each department was one of the success factors of the Matthew Hancock story.	For more clarity, please see Annex A, Statement of Work.
<b>19.</b> Will there be a triaging of the applications and a streamlining process by application development toolsets and limited types of database management systems.	For more clarity, please see Annex A, Statement of Work.
<b>20.</b> Will SSC build, manage and maintain the infrastructure while the Partners will maintain the	For more clarity, please see Annex A, Statement of Work.

QUESTIONS	ANSWERS
Applications and Databases Will there be a balance between SSC and the Partners for human resources – how will operations be handled?	
<b>21.</b> SSCs goals to close data centers has not been very effective. What are the new goals to be?	For more clarity, please see Annex A, Statement of Work.
<b>22.</b> Security Requirements: The RFP suggests that, where necessary, those resources requiring access to Protected information be cleared to the Secret level. This suggests that the Bidder can propose which resources would require protected information to complete their work and then ensure that they are cleared at the right level. This is a flexible approach. However, the SRCL included has checked 10b as a NO, which indicates that NO resources who are not cleared may participate in the work. This limits the depth and breadth of the resources the Crown may have access to to complete the work, particularly as it relates to the Expert Panel. Would the crown consider checking box 10b on the SRCL to a Yes and preserve the intent that only those resources requiring access to protected information require Clearance?	Please see answer to question 4.
<b>23.</b> Can a bidder propose a panel member at a zero dollar rate?	As indicated in the Pricing Schedule (Attachment 1 to Part 3, Pricing Schedule) of the RFP, bidders must submit firm all-inclusive daily rates for the Review Team and members of the Expert Panel. Rates for the members of the Expert Panel must equal or exceed the lowest submitted daily rate.
<b>24.</b> Can the Crown elaborate on the Backup for Project Lead? For example, can the Backup share in the 80 days estimated for Project Leadership? Or is the backup literally a backup that, should the main Project Lead proposed not be available a backup is identified?	Please note that the back-up Project Leader must only be used if the main Project Leader is no longer available as a resource to complete the tasks described in the contract.
<b>25.</b> Terms and Conditions: Will the crown be open to reasonable negotiations on terms and conditions (i.e. Unlimited Liability?)	Bidders may raise comments and questions during this solicitation process. However, Canada will not negotiate or modify any terms and conditions after the bidding closing date.
<b>26. Evaluation:</b> R2 implies that the 4 resources not identified as the Project Lead collectively can achieve 8 points. Can the Crown clarify, for example, that this could imply that 3 of the 4 resources	Canada recognizes that this is a possible scoring scenario. Senior is defined as either having a University Degree (PhD, Graduate, Undergraduate) and 10 years of experience, or a relevant professional certification and 15

QUESTIONS	ANSWERS
have no project experience worthy of a point but the 4th resource has 8 relevant projects and therefore the team can maximize their score?	years of experience. – Further clarification will be provided in a future RFP Amendment.
<b>27. Evaluation:</b> Can the Crown articulate the schedule for evaluation? And desired start date?	Canada has a team strategy ready in place following week of the closing date. Canada estimates that the Technical Evaluation be conducted within 2-3 weeks, depending on the number of bids received. The start date is of course as soon as possible and Canada will do anything in control to achieve the target date of mid-august. We are on a tight timeline.
<b>BC-01. Security:</b> - Our clearances from other countries are acceptable, e.g. U.S., U.K. Govt? – Do all proposed team members require clearance, i.e. Panel members required?	Please see answer to question 4.
<b>BC-02.</b> Different industry partnerships may offer different benefits to TBS – capabilities and experience. Would TBS consider a company participating in multiple bids (as part of bidding team)?	The RFP is open to all companies that can meet the requirements. Companies can choose to bid on their own or through joint ventures, as stated on page 14 of the RFP.
<b>BC-03. Security:</b> Please confirm that security clearance only applies to the contractors with access to sensitive information. A much wider choice of expert panel members will be available if an NDA structure used instead for expert panel members (greater global experience benefits TBS & SSC).	Please see answer to question 4.
<b>BC-04. Security:</b> What security clearance levels are required by – expert panel individuals, consultants, organizations submitting as a whole?	Please see answer to question 4.
<b>BC-05. Security:</b> What are the security clearances required for the expert panel? For the proposed team? Can security clearances be transferred from NATO countries?	Please see answer to question 4.
<b>BC-06.</b> Is it expected that the expert panel and consulting team be resident in the National Capital Region?	No. Clarification: As stated in the RFP under 2.1 Authorised Travel and Living Expenses: for Work: 'the Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work done, delivered or performed at cost, without any allowance for profit and administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the National Joint Council Travel Directive;'

QUESTIONS	ANSWERS
	<p>In addition, in the Statement of Work 8.0 Location of Work 'Work will be performed at the Contractor's site(s). Travel within the NCR may be required. All travel must be approved by the Project Authority.'</p>
<p><b>BC-07.</b> With regards to the additional potential follow-up worth mentioned (e.g. additional "deep dives" potentially required). Will the winning bidder be excluded from competing for this additional work? Or will this additional work be added to the existing contract for the winning bidder?</p>	<p>The resulting Contract has an irrevocable option to extend the period of the contract by one (1) year period, in order to conduct a Periodic Health Review and Other Reviews, as required by TBS. This optional work is to be achieved by the winning bidder, if requested.</p>
<p><b>28. Security:</b> <i>[Bidder referring to Page 29, 6.1 – Security Requirements, b. and c. says only individuals requiring access to classified or protected information, assets or sensitive work must meet the requirements. Source Bidder].</i> Regarding the review team, will the government accept some team members who do not have government security clearance?</p>	<p>Please see answer to question 4.</p>
<p><b>29. Security:</b> <i>[Bidder referring to Page 49, 9 Definitions The Expert Panel definition states they are engaged by the Contractor to review, challenge and enhance the findings.]</i> Since the contractor cannot can't designate anything, the documents the expert panel will be reviewing won't be protected. Can the government confirm that expert panel members do not require government security clearance?</p>	<p>Please see answer to question 4.</p>
<p><b>30.</b> Earlier in the meeting, it was identified that the expert panel requirement was created, in part, to address the issue that most firms qualified to complete this review will have had dealings with SSC and therefore would not be fully independent. Understanding that, there are firms who have made more significant contributions to the current SSC strategy, and therefore would be reviewing their own work or advice. What will be done to avoid awarding a contract to a firm in this position, and will the government consider demonstration of independence and objectivity of</p>	<p>Please see answer to question 3.</p>

QUESTIONS	ANSWERS
the bidder in assessing bids and awarding a contract?	

QUESTIONS	ANSWERS
New Questions and Answers	
<p><b>BC-08.</b> The RFP is oriented solely to large multi-national corporations. There are many other stakeholders that are impacted by SSC. Should the RFP not include a formal consultation with these stakeholders such as the other government departments, other IT industry participants and SSC employees among others? These stakeholders would critical in helping SSC meet its objectives.</p>	<p>This RFP is not oriented solely to large multi-national corporations and is open to all companies that can meet the requirements. Companies can choose to bid on their own or through joint ventures, as stated on page 14 of the RFP.</p> <p>With regards to concerns about other stakeholders, the bidder is asked to submit a work plan that they feel would deliver the strongest results against the Statement of Work.</p> <p>SSC will be consulting with employees, unions, other government departments, industry and Canadians in the coming months and the results will be provided to the winning contractor.</p>
<p><b>BC-09.</b> The RFP does not seem to include a requirement for expertise related to the Government of Canada IT infrastructure or workload consolidations in the GOC. Should the Expert Panel include at least several members with this type of expertise?</p>	<p>The RFP does not specifically ask for expertise related to the Government of Canada IT infrastructure or workload consolidations in the GC. The Expert Panel could consist of people with such experience, but must meet the mandatory requirements listed on page 19 of the RFP and should meet the rated requirements on pages 4-7 of amendment 02 to the RFP.</p>
<p><b>BC-10.</b> Expert Panel – How did you arrive at the level of effort outlined in this RFP (a certain amount of hours is stated), and what time expectations are there for the panel to review current state materials in order to be effective?</p>	<p>The level of effort was estimated by considering the time required to review the documents and any additional materials as required and to prepare the presentation material.</p>
<p><b>31.</b> At the vendor session recently, a number of questions were posed regarding the security clearance requirement for the proposed team, both from the bidder and for the expert panel. Obtaining security clearance of any nature (i.e. enhanced reliability, secret) at time of bid closing will be highly unlikely, even with a request to PSPC to expedite these clearance requests. This will constrain the ability of bidders to secure highly experienced talent to contribute to this important independent review.</p> <p>That said, there are security constraints regarding key documents that should be provided to the bidder so that it can fulfil its obligations fully.</p>	<p>Please see answer to question 4.</p>



QUESTIONS	ANSWERS
<p>As a potential option, would the Crown consider having one of the core team members with a mandatory top-secret clearance? This would allow this individual – who has a higher obligation level to protect secret-designated assets than those with secret or reliability clearance levels – as the recipient of secret documents with the duty to convey only key summary information to the broader bidder team?</p>	
<p><b>32.</b> At the vendor session recently, the question of ‘independence’ of the bidder was raised, regarding firms who have contributed significantly to the current SSC operations and future-state plans. The concern was that this type of bidder would be conflicted in providing independent advice to TBS given their involvement to date in SSC operations. The answer was that the expert panel would bring this independence requirement to the bidder.</p> <p>Expert panel members, even if not employees of the bidder, would frequently have had a relationship with the bidder – as advisors, as former employees, as clients, etc. So there would be a level of familiarity of the panel members with the bidder and not as independent as may seemingly be the case. Also, there is a financial arrangement between the expert panel and the bidder since the bidder would be the holder of the contract with TBS. This may also impair independence. To this end, would the Crown reconsider and preclude those firms from bidding on this RFP if they have had a significant business relationship with Shared Services Canada?</p>	<p>Canada is not prohibiting ‘firms from bidding on this RFP if they have had a significant business relationship with Shared Services Canada’.</p>
<p><b>33. Security:</b> We understand the security requirement is being revisited and we would like to recommend that status of “pending” be considered. We recommend that RCMP security clearance also be considered as acceptable.</p>	<p>RCMP security clearance alone will not be considered. Please see answer to question 4.</p>
<p><b>34.</b> Based on the RFP, it is clear that Canada values the independence and objectivity that an outside, Expert Panel can provide, particularly given requirements around non-IT experience, international experience, and senior executive experience and the fact that these resources are not</p>	<ul style="list-style-type: none"> <li>• Please see answer to question 4.</li> <li>• Regarding R1-B3, Canada will not accept assertions by the proposed Expert Panel members in their experience write-ups instead of documentation; however,</li> </ul>

QUESTIONS	ANSWERS
<p>employed by the Bidder. Two questions follow given the recent Amendment:</p> <ul style="list-style-type: none"> <li>• Will Canada accept Bids that include Panel Members who have initiated the process for Reliability Status? In order to bring global experience to Canada we have secured commitment from international experts, but each for obvious reasons has not initiated security clearances with the Government of Canada. Can a Bidder submit a bid as long as Reliability Status applications are in for processing?</li> <li>• Regarding R1-B3, Canada is asking Expert Panel members to find documentation substantiating their claims, which in some cases may be proprietary information belonging to firms they no longer represent. Will Canada accept assertions by the Senior Executives in their experience write-ups instead of documentation?</li> </ul>	<p>Canada will accept written references from the IP owner.</p>
<p><b>35.</b> Looking more closely at the amendment, Canada defines a Senior Executive as follows: "Senior-level executive is defined as an Assistant Deputy Minister level in the public service or a C-Suite position in the private sector". We are assuming a fairly liberal interpretation of the phrase "C-Suite" but wanted to confirm with Canada that this is appropriate. From a commercial perspective, there are executives who run multi-billion dollar business units with the title of Vice President or Executive Vice President, for example. We would assume Canada to remain interested in their experience should it be secured even though their title does not start with a "C". Is this accurate?</p>	<p>Canada will accept expert panel members submitted who are not C-suite level, but have managed business units similar in size and scale as that of a large government organisation.</p>
<p><b>36.</b> We understand that the security requirements for this contract have been modified to Reliability level for Expert Panel members. Could the Crown confirm that having these security clearances "in-progress" with PWGCS at the time of bid submission would be acceptable? This would be of particular importance in instances where international experts are being considered/proposed for these roles.</p>	<p>Please see answer to question 4.</p>
<p><b>37.</b> If a core team member has a Top Secret level security clearance with the United States Department of Defense, would this be suitable to</p>	<p>Canada will need to verify all security clearances, and recommends that bidders</p>

QUESTIONS	ANSWERS
<p>meet the security requirements listed in Part 6 and in Annex C of your RFP? In this instance, it must be noted that the specific details of the clearance (i.e. file number, etc.) would not be included in the actual bid submission as these requests have to be issued from Government to Government.</p>	<p>submit their requests to CISD at PSPC for confirmation as soon as possible.</p>
<p><b>38.</b> Mandatory Criteria M1 states that bidders must have experience in completing reviews similar in scope to the SOW for large-scale IT projects. We request clarification on the following items:</p> <p>i) Please confirm the minimum number of scope areas that must be covered by a single review or across all qualifications to meet this mandatory requirement. For example, will a review that focuses only on Service Management or Project Management satisfy M1.1? Would a 4 week assessment be considered similar?</p> <p>ii) Please confirm if there is a requirement for the Project Lead or other review team members to be members of the delivery team for the requested corporate qualifications.</p>	<p>In response to question i), Canada notes that each of the three examples provided must include all of the qualifications listed in M1.1 and M1.2. A review that focuses only on Service Management or Project Management would not be sufficient.</p> <p>A 4 week assessment would be sufficient if all the areas in M1.1 and M1.2 were covered and it was a review of a large scale IT Project (defined as a project in government or industry valued at over \$100M)</p> <p>In response to question ii) it is not a requirement that the Project Lead or other review team members be members of the delivery team for the requested corporate qualifications.</p>
<p><b>39.</b> Rated requirement R2 does not guarantee that TBS will be provided the strongest candidates in the event that the Back-up Project Lead is required and potentially allows a vendor to manipulate the evaluation by:</p> <p>Proposing a highly-qualified Project Lead and delivering the project with a less qualified Back-up Project Lead</p> <p>Proposing a highly-qualified Back-up Project Lead to score maximum points</p> <p>Providing a Project Lead and Back-up Project Lead that can achieve combined maximum points are less qualified than a single Project Lead resource that other bidders may propose</p> <p>To ensure that Review is delivered by the proposed Project Leader and TBS is provided with the strongest candidates we recommend that the rating of the Product Leader and Back-up Project Leader be separated and individual minimum scores be defined.</p>	<p>Canada will change the wording in R2 to reflect the following:</p> <ul style="list-style-type: none"> <li>number of projects led and completed (i.e. end –to-end) by the Project Leader and back-up for reviews of this nature and scope  <i>1 point for each project, to a maximum of 4 points for the Project Leader and a maximum of 2 points for the back-up</i></li> <li>number of projects led and completed (i.e. end –to-end) by the Project Leader and back-up for IT-related reviews of this nature and scope  <i>1 point for each project, to a maximum of 4 points for the Project Leader and a maximum of 2 points for the back-up</i></li> </ul>

QUESTIONS	ANSWERS
<p><b>40.</b> For rated criteria R2 please consider that large-scale IT projects and Shared Service transformations includes reviews if IT and non-IT areas; with this in mind please clarify if:</p> <p>i) a project will be awarded 2 points if both "reviews of this nature and scope" business/non-IT reviews) and "IT-related reviews of this nature in scope" are satisfied within the breadth of the project reference.</p> <p>ii) 6 projects as described in i) will score a total of 12 points</p>	<p>In response to question i) this is correct, 2 points would be awarded if both criteria are met.</p> <p>In response to question ii) this correct, assuming the six projects meet both evaluation criteria.</p>
<p><b>41.</b> Requirement M3 states that each panel member must be a senior-level executive or must have been a senior-level executive in the last 5 years in a C-Suite or ADM role. While we understand the strategic nature of this review and the value expected for SSC and Canada as a whole we believe that there are highly qualified resources at the VP and SVP level of private organizations. In addition we believe Partners at consulting firms possess the desired experiences. As a result we seek clarification on the qualifications of resources required and request for bids with non C-Suite resources to not be deemed non-compliant.</p>	<p>See response to question 35.</p>
<p><b>42.</b> Requirement M3 states that at least one Expert Panel resource must have 20-years of IT field experience and 10 as a CIO. We seek clarification on the following:</p> <p>i) Please confirm if TBS will accept a candidate with 20 years of IT field experience and 10 years as a CIO, CTO, SVP or VP roles involved in technology delivery.</p>	<p>See response to question 35.</p>
<p><b>43.</b> Section 4 of Annex A, Statement of Work states: "The anticipated level of effort required by the each member of the Review team is 65-80 working days for Scope of Work items 3.1 to 3.5, but is not to be construed as a contract guarantee. The anticipated level of effort required by each member of the expert panel is approximately 30-60 hours over the length of the contract for Scope of Work items 3.1</p>	<p>In response to question i): As stated in the Statement of Work 3.1 item C 'Final Work Plan' 'The Project Authority will approve the methodology and schedule prior to the start of the independent review.</p> <p>Further, on page 30 of the RFP the Task Authorisation process is described under 7.1.2.</p>

QUESTIONS	ANSWERS
<p>to 3.5, but is not to be construed as a contract guarantee."</p> <p>While we understand an estimated level of effort will allow PWGSC to compare bidder submissions it is unclear how the level of effort required to deliver the review will be confirmed. Please clarify</p> <p>i) If confirmation on the breadth and depth of analysis and associated level of effort will be confirmed as part of the negotiation process</p> <p>ii) If bidders are expected to finalize their proposed scope and approach as part of the bid process and are contractually obligated to any proposed level of effort</p> <p>iii) If a PWGSC is willing to negotiate a fixed price engagement as part of contract award</p>	<p>The breadth and depth of analysis and associated level of effort will be assessed by the Project Authority prior to initiating a Task Authorisation.</p> <p>In response to question ii) Canada does not request that the bidder finalize their scope and approach as part of the bid process, nor does it contractually oblige the bidder to a proposed level of effort. The bid will be evaluated based on the mandatory and rated criteria. Specific to the approach the bid will be evaluated against R3 on page 23 of the RFP. With regards to levels of effort see response to question 43.</p>
<p><b>44.</b> Based on the proposed approach please clarify if bidders can propose additional resources above and beyond the defined roles within the Review Team, and if so TBS accept the associated resource costs in the event of a winning bid?</p>	<p>No the bidders may not propose resources above and beyond the defined roles within the Review Team.</p>
<p><b>45.</b> PWGSC will not have an opportunity to interact with the proposed Review Team or Expert Panelists given that an oral presentation is not part of the evaluation process. To demonstrate the experience of international and independent Expert Panel we feel it is necessary to provide a more comprehensive description of the activities and undertaken by proposed resources. We request that PWGSC extend the deadline until the August 5th, 2016 to provide bidders with sufficient time to processes responses and develop the level of detailed required in a responses that enables PWGSC to objectively evaluate the quality of proposed resources.</p>	<p>Canada does not wish to extend the RFP.</p>
<p><b>46.</b> Based on requirements articulated in the RFP for the Expert Panel to have a mix of public sector, private sector, Canadian and international experience we believe Canada's intent is to have a world-class Expert Panel drawing on broad-based and diverse experience from a range of executives from around the world. We believe the ability for bidder's to bring such world-class experience to Canada is limited by the need for Expert Panel members to have a Reliability Status at bid</p>	<p>Please see answer to question 4.</p>

QUESTIONS	ANSWERS
<p>submission (ref: Amendment 2; Security Requirements Check List (SRCL)).</p> <p>For non-Canadian potential Expert Panel members, it is our understanding after speaking with the Contract Security Program at PSPC (PSPC-CSP), to be cleared to Canadian Reliability Status they: a) require an existing government clearance in their home country, and b) the Canadian clearance process cannot be started until a contract is awarded. This limits bidder's ability to meet bring the kind of world-class and specific experience to Canada as intended by the RFP.</p> <p>Similarly, for potential Canadian Expert Panel members who do not already have a Reliability Status or security clearance it is our understanding that the clearance process cannot be initiated until contract award (since Expert Panel members cannot be employed by the bidder, PSPC considers them to be sub-contractors and the PSPC process prohibits a sub-contractor from being cleared until after Contract award).</p> <p>Therefore the current requirement for the Expert Panel members to have a Reliability Status at bid submission limits the potential candidates for the Expert Panel to executives that have existing Reliability Status with the Government of Canada. This means the set of Expert Panel candidates are therefore most likely former Canadian public servants or independent Canadian-resident contractors that have done work with the Government previously and have an existing Reliability Status or a Security clearance. This has the effect of limiting bidder's ability to bring world-class expertise to Canada, and thus potentially limits the value that Canada could realize from the Expert Panel. We believe this is contrary to the intent of the RFP.</p> <p>With the above in mind, we would respectfully ask:</p> <ul style="list-style-type: none"> <li>Given the role that Canada expects the Expert Panel to play (orienting, validating, challenging, etc), and the intent within the RFP that the panel be</li> </ul>	

QUESTIONS	ANSWERS
<p>a world-class panel with the type of experience valued by Canada for this effort, would Canada consider waiving the requirement for Expert Panel members to have an existing Reliability Status at time of bid submission?</p>	
<p><b>47.</b> Similarly, the requirement for core team members to have Secret clearance at time of bid submission limits potential team members to Canadian-resident consultants who already work with the Government of Canada. (ref: Amendment 2; Security Requirements Check List (SRCL))</p> <p>Also through our discussions with PSPC-CSP, we understand that this requirement will preclude bidders from putting forward team members from other nations (such as the USA) who may be Secret cleared in their home country, but have not been cleared by Canada (Our understanding from the Contract Security Program is that bidders cannot initiate a Request for Visit process (the process to have the CSP validate an existing US Secret clearance) until after contract award).</p> <ul style="list-style-type: none"> <li>• Would Canada accept bids with core team members who have existing US Secret clearances, and are eligible for Secret clearance in Canada as a result – such Canadian clearance to be completed after contract award per PSPC-CSP processes?</li> </ul>	<p>Please see answer to question 4.</p>

**All other terms and conditions remain unchanged.**