

**RETURN BIDS TO :**

**RETOURNER LES  
 SOUMISSIONS À:**

Bid Receiving Shared Services Canada  
 | Services partagés Canada  
 180 Kent Street  
 13<sup>th</sup> Floor  
 Ottawa, ON K1G 4A8

**REQUEST FOR PROPOSAL  
 AMENDMENT #10**

**DEMANDE DE  
 PROPOSITION**

Proposal To: Shared Services  
 Canada

We hereby offer to sell to Her Majesty the Queen in right of Canada, in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the goods, services, and construction listed herein and on any attached sheets at the price(s) set out thereof.

**Proposition aux: Services partagés  
 Canada**

Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées

**Instructions : See Herein**

ou incluses par référence dans la présente et aux annexes ci-jointes, les biens, services et construction

**Instructions: Voir aux présentes**

énumérés ici sur toute feuille ci-annexées, au(x) prix indiqué(s)

Comments - Commentaires

**This document contains a Security  
 Requirement**

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

**Issuing Office – Bureau de distribution**  
 Shared Services Canada  
 180 Kent Street  
 13<sup>th</sup> Floor  
 Ottawa, ON K1G 4A8

<b>Title – Sujet</b> SBIPS – ITSM Process Maturity Solution	
<b>Solicitation No. – N° de l'invitation</b> 10052799	<b>Date</b> 12-Jun-2017
<b>Amendment</b>	10
<b>Client Reference No. – N° référence du client</b> RAS 16-43488	
<b>Buy &amp; Sell Reference No. – N° de reference de SEAG</b> 10052799	
<b>File No. – N° de dossier</b> 10052799	<b>SBIPS SUPPLY ARRANGEMENT</b> EN537-05IT01.
<b>Solicitation Closes – L'invitation prend fin</b> <b>at – à 2 :00 PM</b> <b>on – le 23-June-2017</b>	
<b>Time Zone</b> <b>Fuseau horaire</b> Daylight Saving Time DST	
<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 Inquiries to : - Adresser toutes questions à:</b> Julie Bampton	
<b>Buyer Id – Id de l'acheteur</b> C09	<b>Telephone No. – N° de téléphone :</b> 613-790-5915
<b>FAX No. – N° de FAX</b>	
<b>Destination – of Goods, Services, and Construction:</b> <b>Destination – des biens, services et construction :</b> See Herein	

<b>Delivery required - Livraison exigée</b> See Herein	<b>Delivered Offered – Livraison proposée</b>
<b>Vendor/firm Name and address</b> <b>Raison sociale et adresse du fournisseur/de l'entrepreneur</b>	
<b>Facsimile No. – N° de télécopieur</b> <b>Telephone No. – N° de téléphone</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/de l'entrepreneur</b> <b>(taper ou écrire en caractères d'imprimerie)</b>	
<b>Signature</b>	<b>Date</b>

QUESTION #	QUESTION	ANSWER
32	<p>The RFP (Page 2 of 105) indicates that “No Contractor is presently performing these services”.</p> <p>It is known that SSC, ITSM Branch employs many independent contractors and subcontractors. As per Government of Canada and SSC procurement policy, these independent contractors and subcontractors must be associated with a Firm, many of which are listed in B. Potential Bidders.</p> <p>Many of these subcontractors have been engaged with SSC for a significant period of time and in the early stages of the ITSM Process Maturity Solution program. Utilizing these independent contractors and subcontractors, provides those Firms that they are associated with an unfair advantage in both knowledge and relationships.</p> <p><b>To ensure that no potential bidder has an unfair advantage, will SSC:</b></p> <ul style="list-style-type: none"> <li>• <b>Disclose the independent contractors and subcontractors who have worked within the SSC ITSM Branch over the past 12 months and prohibit Firms from using these independent contractors and subcontractors for the 7 Key Resources throughout the life of this engagement (60 months)?</b></li> </ul>	<p>Canada has employed the use of many contracted firms and resources since its inception that have various levels of knowledge of SSCs practices, processes and procedures. To disqualify firms or resources from this procurement based on a perception that they would have an unfair advantage is deemed inappropriate as all firms, contractors and subcontractors that are part of this bid process have the same and most current information available to them as part of the reading room reference documentation provided.</p> <p>Additionally, the 7 key resources identified in this procurement are being rated based on the role experience and ITSM experience and not on knowledge or experience within SSC.</p>
69	<p>Annex A - Statement of Work          Section 5.3 Pages 64,65          Process for Acceptance</p> <p>It was unclear if Testing was a requirement for the Contractor to fulfill. It appeared that SSC will be responsible for all testing and test management. Can SSC please confirm that SSC will manage testing of all processes and the technology solution as part of UAT prior to each release package?          If confirmed, would this include a Test Environment; Test Strategy and Plan; Test Schedule; Use Case and Scenarios; Test Cases; Defect Tracking and Defect Resolution Tracking; and Test Results Reporting and Certification/Approval?          If confirmed, how much testing time does SSC require?</p>	<p>Canada confirms that SSC will be responsible for all testing and test management and will manage the testing of all processes and the technology solution as part of UAT for each release package. The Contractor will, however, be provided with access to the test environment to allow verification of accurate process configuration in the tool. The Contractor will be expected to conduct quality assurance prior to transferring to SSC for UAT.</p> <p>Canada confirms that this would include all requirements for testing (erg. a Test Environment; Test Strategy and Plan; Test Schedule; Use Case and Scenarios; Test Cases; Defect Tracking and Defect Resolution Tracking; and Test Results Reporting and Certification/Approval)</p> <p>Any defects detected in UAT will be directed to the ITSM Process Maturity Solution Contractor to validate and prioritize. The ITSM Process Maturity Solution Contractor will be required to vet all solution</p>

		<p>defects, provide input regarding their validity and propose options for resolution.</p> <p>Testing will follow the process and timelines identified in section 5.2 Process for Acceptance.</p>
72	<p>Annex A - Statement of Work          Section 4.2 Page 62</p> <p>SSC's Enterprise CMDB Initiative</p> <ul style="list-style-type: none"> <li>• The initial focus of SACM has been on populating and mapping Application to Server CI's and location, starting with 500 Critical Business Applications (CBAS).</li> <li>• As of February 2017, the CMDB currently includes approximately 80,000 configuration items. Can SSC provide additional operational ITSM metric volumes for the past 12 months as a baseline from which to identify potential problems areas or gaps in existing processes or governance and to help size training requirements? Metrics could include:             <ul style="list-style-type: none"> <li>• Total volume of CIs changed per month</li> <li>• Total volume of Incidents per month (Critical vs. Non-critical)</li> <li>• Total volumes of Incidents Caused by Changes per month</li> <li>• Total volumes of changes per month (Standard, Non-Standard, Urgent, Emergency and Un-authorized)</li> <li>• Total volumes of new Problem records per month</li> <li>• Average duration to close a Problem/Resolve record</li> <li>• Total number of Operating Level Agreements current in place between delivery units</li> <li>• Total number of SLAs to be managed by the Service Level Management process</li> <li>• Total number of IT Delivery Units (internal/external) that will be using the processes</li> </ul> </li> </ul>	<p>The data below has been provided to assist Bidders in preparing their bids. The inclusion of this data does not represent a commitment by Canada that Canada's future usage of the services identified in this request for proposal will be consistent with this data. It is provided purely for information purposes. SSC is not currently at a mature process level where we have good measures in place and so the volumetrics represent approximate monthly values.</p> <p>SSC cannot provide additional operational ITSM metric volumes for the past 12 months as an accurate baseline, however, the following metrics can be considered:</p> <ul style="list-style-type: none"> <li>• CI records created: 4500 per month (expected to rise by a factor of 10 or more as we approach full legacy migration and end-state)</li> <li>• Incidents raised (all): 1800 per month (expected to rise considerably as we approach full legacy migration and end-state)</li> <li>• Incidents raised (critical): 25 per month (expected to rise marginally as we approach full legacy migration and end-state)</li> <li>• Total RFCs implemented: 4000 per month (expected to rise by a factor of 10 or more as we approach full legacy migration and end-state)</li> <li>• RFCs implemented (standard): 2000 per month (expected to rise by a factor of 10 or more as we approach full legacy migration and end-state)</li> <li>• RFCs implemented (emergency): 100 per month (expected to rise considerably as we approach full legacy migration and end-state)</li> <li>• Incidents generated by RFCs: 5 per month</li> <li>• Total Number of new problem records: 100 per month (expected to rise by a factor of 10 or more as we approach full legacy migration and</li> </ul>

		<p>end-state)</p> <ul style="list-style-type: none"> <li>• Average duration to close Problem record: 60 days</li> <li>• SSC currently has no (zero) OLAs in place among support groups</li> <li>• SSC has Business Arrangements with customers and is currently working to formalize SLAs with all customers. There also exists three core service standards for each of SSC's 27 managed services.</li> <li>• Total number of IT Delivery Units that will be using the processes: All SSC operational teams.</li> </ul> <p>The SSC Configuration Management team expects that SSC will eventually get to a half-million CIs and thousands of relationships between these CIs and other artefacts.</p>
<p>96</p>	<p>Attachment C.1, R1-5. "A Customer Reference Check will be conducted for one of the three references submitted by the Bidder in response to criterion R1-1, as described in Section 3.3(b)."</p> <p>a) Where is Section 3.3 (b) in the RFP?</p> <p>b) How will the one project reference be selected? Please confirm that if only one project reference is provided with +200,000, that reference would be selected in order to have the opportunity to maximize points.</p> <p>c) How will the one project reference be selected? Can SSC allow the Bidder to propose the Project Reference that should be used for the reference, based on our analysis of which project will score the most points against Q1 to Q5?</p> <p>d) Q1 states: "A similar organization would be expected to have greater than 200,000 employees, diverse business needs and multiple Partner-type organizations." Can SSC provide examples of "diverse business needs" and of "multiple Partner-type organizations"?</p> <p>e) Q2 states: "2 points for both the commencement and end date. "Ongoing" or "Active" is considered an acceptable end date and any date before July 2015 is considered an acceptable start date." Please confirm that if a project was completed in the last year and there is no ongoing or active activity on the project, the reference would lose 2 points (times 3).</p> <p>f) Q2 states: "2 points for both the commencement and end date. "Ongoing" or "Active" is considered an acceptable end date and any date before July 2015 is considered an acceptable start date." Please confirm that if a project reference started after July 2015, it would lose 2 points (times 3).</p> <p>g) R1-5 Q1 refers to 200,000 employees, and R1-2 for 6 points refers to 250,000 end users. Should those two numbers be the same?</p>	<p>In response to Attachment C.1, R1-5, "A Customer Reference Check will be conducted for one of the three references submitted by the Bidder in response to criterion R1-1, as described in Section 3.3(b)."</p> <p>a) Reference to Section 3.3(b) is in error and should be replaced by attachment C.2 (page 76)</p> <p>b) Project references will be selected at the discretion of SSC based on the reference's scope similarity to SSCs requirement, as stated in R1-1, R1-2, R1-3 and R1-4.</p> <p>For R1-5, Canada has decided to remove Question #1 – "Please describe the customer organization" to negate the concern regarding Canada choosing a reference that would not provide the bidder with maximum points (based on the size/scope of the reference). To compensate for the point reduction in R1-5 Canada has decided to place double the point value for Question #3 "Please rate the performance of the Bidders ITSM Process Maturity Solution", whereby 8 points will be awarded where the narrative rates the performance as "excellent", 4 points will be awarded where the narrative rates the performance as "good", 2 points will be awarded where the narrative rates the performance as "acceptable", and 0 points will be awarded where the narrative rates the performance as "unacceptable".</p> <p>c) Please see response to b) above.</p>

		<p>Once Question #1 is removed, the remaining questions relate to the quality of service that the Contractor provides and Canada reserves the right to select the reference to get a more arbitrary and random reference narrative, reflective of the consistency in quality of the Bidders solution.</p> <p>d) See answer to question b above, question #1 has been removed.</p> <p>e) Incorrect. Completed projects apply as an acceptable end date, as long as the bidder's ITSM process maturity solution is being used ("active"), and would not be deducted points accordingly.</p> <p>f) Correct. If a project reference started after July 2015, it would lose 2 points (times 3).</p> <p>g) Please see response for b) above. The question and reference to 200,000 has been removed.</p>
120	<p>Page 43, Section 3.1.2, the RFP indicates that "To ensure that the processes are adopted and understood within SSC there is a heavy organizational management component to the contract as well as the requirement to ensure that at a minimum, each process meets a specified set of criteria by the end of the contract. The criteria to be met for each process is based on the International Standard for Service Management (ISO 20000) and referenced in (Section 6 – Process Maturity Final Evaluation Criteria)." Are these criteria (eg. ISO 20000) to be met by the processes as part the timeframe for the Lean Processes, or would they only need to be addressed by completion of the Process Improvement or Mature Processes?</p>	<p>The criteria provided in section 6 will be used to evaluate the fully mature processes to be delivered within 30 months of contract award.</p> <p>In addition, the same criteria will be used to assess all iterations of the processes developed by the contractor. This includes the evaluation of the initial Lean versions and the interim process improvement versions. The assessment of the early versions is done to document what progress is being made and where additional work is still required.</p> <p>There are dependencies among certain criteria and some will have a higher priority for addressing SSC's business needs. Therefore, SSC will not withhold acceptance of the lean processes or the process improvement processes solely because it did not meet all the criteria listed in section 6.</p>
135	<p>In response to Amendment 6, Question #55, we strongly recommend the Crown reconsider its decision to remove R2-2 vi. The Training Needs Assessment and Strategy forms an integral part of the implementation plan and removing this may increase risk of staff adoption of the new ITSM processes. It also increases the risk of meeting the RFP requirement of delivering an integrated OCM Strategy and Plan 30 days post contract award (which training is a key element) in order to allocate adequate time to develop the outputs of the Change Management Strategy and Plan.</p>	<p>See response to Q55. The Training Needs Assessment and Strategy will not be part of the bid evaluation. It is expected that the successful bidder will be in a better position to assess the needs once on location and develop an appropriate strategy accordingly.</p>

	<p>Finally, removing Training Needs Assessment and Strategy from evaluation of the OCM Strategy poses a risk to the Crown of selecting a bidder without having evaluated the details of the bidder's structured train the trainer approach.</p> <p>We strongly recommend keeping R2-2 vi. The Training Needs and Assessment and Strategy in the RFP as is.</p>	
136	<p>In line with leading change management practices, the Sponsorship Strategy should be addressed in the Stakeholder Engagement Strategy, and a Coaching Strategy should be included in the Training Strategy or Resistance Management strategies. Therefore separate strategies seems redundant. We recommend these two new strategies not be added as separate strategies in the RFP.</p>	<p>See response Q55. The Sponsorship Strategy and Coaching Strategy will be retained to be rated separately. It is an important component of the overall OCM strategy.</p>
138	<p>Canada updated the requirements for the Bidder (prime) in a partnership arrangement to supply a minimum of 3 of the 7 key resources, one being the Senior Project Manager. To deliver this project successfully there will be a requirement for seamless integration between the Prime Bidder with the subcontractor(s) to the prime. Would Canada accept that 4 out of 7 resources be delivered by the Prime Bidder if 1 of the resources is not the Project Manager.</p>	<p>Canada will accept the recommendation that 4 out of 7 resources be delivered by the Prime Bidder in lieu of one of the resources being the Senior Project Manager. Canada will still require that the Senior Project Manager be the central point of contact to SSC for project related information/ decisions and will require that this resource be empowered to make project decisions on behalf of the prime in the partnership arrangement.</p> <p>Therefore for partnership arrangements Canada will require the prime to have 3 out of the 7 resources provided one of them is the Senior Project Manager or will require the prime to have 4 out of the 7 resources in lieu of the Senior Project Manager.</p>
139	<p>Annex A - Statement of Work          Answer to Q66          2.3 Objectives          3.1.2 ITSM Processes Scope          Term "Partners"          Page 38</p> <p>2.3 Objectives: The "SSC ITSM Process Maturity Solution" contractor will be required to work collaboratively with SSC resources so that the processes and technology solution are sustainable, efficient to operate, and allow SSC and its customers to realize the benefits of new and/or improved ITSM processes.</p> <p>3.1.2 ITSM Processes Scope: Since all processes developed will be for the benefit of SSC and its customers, the customer touch points and interactions must be included as part of process design and implementation.</p> <p>Q66 Answer: "Partners" refers to the federal government organizations for whom SSC is mandated to provide email, data centre and telecommunications services. The partner</p>	<p>The description of SSC IT resources and SSC customers is accurate.</p> <p>The customers are key stakeholders in the development of SSC's ITSM Process Maturity Solution as they will participate, as users, in their operation.</p> <p>As key stakeholders, customers may be called on to participate in process design review and testing. SSC will coordinate and manage the collaboration and engagement between the contractor and these stakeholders.</p>

	<p>organizations are listed in the following webpage:  <a href="http://www.ssc-spc.gc.ca/">http://www.ssc-spc.gc.ca/</a>        The RFP refers to SSC resources, customers, agencies and partners. Our interpretation of these customer entities are as follows:</p> <ul style="list-style-type: none"> <li>• SSC resources are SSC IT resources that support SSC customers, agencies and/or partners for IT services and would be direct users of the ITSM Processes in support delivery of IT services.</li> <li>• SSC customers/agencies/partners are synonymous and are the internal business clients and federal government organizations for whom SSC provides services and are end-users of IT and would be beneficiaries the ITSM processes only from an end-user perspective. There are 42 partners that SSC IT services as indicated by the link provided by SSC.</li> </ul> <p>Please confirm our understanding of the above.</p> <p>We would also like to understand the level of engagement expected with these entities during process design and testing.</p> <p>Q18a) To what extent does SSC expect collaboration between SSC IT, the Contractor and the customer entities above on process design and testing?</p> <p>Q18b) Will these customer entities have an active role in process design review, input and approval?</p>	
140	<p>Under Annex C" Technical Evaluation, a) Mandatory Criteria it States;        Key Resource Qualifications: The Bidder will be evaluated with respect to the mandatory key resource qualification requirements (experience and certification). These requirements apply at the time of contract award and are to be demonstrated in the resumes provided for each of the positions identified below. If SSC has awarded the contract but is delayed in its starting date, SSC will provide the Bidder with 5 working days to submit resumes for new resources due to the original resources being employed elsewhere. Replacement resources have to meet the same requirements of this contract.</p> <p>Annex F, 1.2 Status and Availability of Resources, states;        "For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default."</p> <p>In an effort to keep costs as competitive as possible, utilizes a just-in-time staffing strategy where we project employment requirements to optimize resource utilization is required. Annex C, states that if SSC awards the contract and delays the start date we can substitute resources. There is no award date or project start date published in the RFP and our resources are based on the draft documentation provided, and of course may be subject to change as a result of findings during the initial 30 day period as referenced on page</p>	<p>Annex F is the SBIPS standard Certification Clauses.</p> <p>SSC will not change the certification clauses. The bidder must identify 7 key resources to evaluated and if any of those 7 resources needs to be replaced due to circumstances beyond control after contract is awarded, then the winning bidder will follow section 7.15 Professional Services General in the Resulting Contract Clauses.</p>

	<p>61, 3.3.</p> <p>I would like to request the following modification:</p> <p>1. The modification of Annex F, 1.2 to read:</p> <ul style="list-style-type: none"> <li>• Upon award the Bidder has 5 working days to review the resources and resumes submitted, and after the 30 day initial period based upon prevailing conditions to adjust resource plans to ensure project success. This can be due to the new project findings, original resource availability or by death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default. Replacement resources have to meet the same requirements of this contract"</li> </ul>	
142	<p>Amendment 4, Question 31, "...the RFP will be modified to include a requirement for the Bidder (prime) to provide a minimum of 3 of the 7 key resources, one being the Senior Project Manager." This is a good change, but note that the experienced Project Managers and Business Transformation Architects that have lead ITSM Transformation projects for global organizations with +250,000 end users cannot be proposed as part of the original 7 key resources because most are not based in Canada and cannot get the required Security Clearance by bid closing. (For example, Loblaws, DND, and Canada Post are three of the largest organizations in Canada. They have just over 100,000 employees and they have not completed the scope of ITSM transformation projects requested in this RFP.) For those 3 of 7 key resources, or at least the Project Manager, can SSC allow Bidders to propose resources that can initiate Reliability clearance before bid closing but may not get their Clearance until after contract award?</p>	<p>Due to the unknown amount of time it takes for clearances to be processed Canada will not make the change.</p>
143	<p>In Annex B, in the Professional Services Table there is only one firm per diem rate allowed rate for 5 years of the contract. Providing a firm rate for 5 years is not reflective of the changes in market rates that occur over a 5 year period. Having one rate for 5 years forces bidders to unnecessarily increase rates that result in SSC having to pay more for resources in the early years of the contract as inflation is front loaded to the per diem rates. To provide a more accurate pricing and evaluation mechanism (and for SSC to pay per diem rates that are more in line with the market) we strong suggest that SSC allow for a per diem pricing table that allows vendors to put in rates for each contract year or at a minim contract years 1-2, 3-4 and 5.</p>	<p>No change.</p>
144	<p>There are a number of questions that have been submitted on this procurement that are still to be answered. Many of them affect the solution significantly.          We are therefore requesting an extension to allow us to incorporate those answers as they are released.</p>	<p>There will be no further extensions.</p>
145	<p>Amendment 1, Question 3. Can SSC confirm that "combining their experience to respond to the RFP" includes the Prime being able to use Project References from the Subcontractor?</p>	<p>Confirmed however see Q&amp;A 138 – Amendment #10</p>
146	<p>As has been noted, the Transformation Project and the ITSM tool implementation are inexorably linked. It is highly likely that the process maturity work resulting from the Transformation Project will inform requirements for the eventual tool RFP and selection. In the absence of fully articulated requirements for the ITSM tool, will Canada</p>	<p>Canada will not change the rating criteria for prior experience in delivering the technical solution. SSC intends to develop an ITSM Solution based on an industry leading ITSM tool because the</p>

	remove points awarded in R1-4 for references related to a small subset of possible tools that meet requirements that are yet to be fully articulated?	functionality these tools offer matches what SSC requires. Accordingly, the evaluation for this RFP provides more points for bidder with experience implementing these industry leading tools. However, this does not disqualify bidders with experience with other tools.
147	For the record, many SSC client departments have invested tens of millions of dollars in the adoption of ITSM tools that are fully functional and performing against requirements that are similar to those of SSC – some winning accolades and distinction in the marketplace for doing so. Further, it is our understanding that existing vendors have offered Canada a minimal investment over their currently owned perpetual licenses to obtain an entity license covering all of GC. Can Canada confirm that it intends to forgo all investments made to date in the adoption of ITSM tools in order to select a new tool that is valued only for its position on the Gartner Magic Quadrant? It is our position that Canada should not place any bias on the eventual tool implementation in this RFP. Accordingly, will Canada remove extra points awarded in R4 for the implementation of ServiceNow and/or BMC Remedy?	Canada will not remove the criteria R1-4 nor the requirements associated with it. Please reference Q77 and associated response.
148	“It is our understanding that SSC has received advisory services from vendor firms and independent contractors in the preparation of this bid, including the 2015 maturity assessment, amongst other deliverables. It is also our understanding that these vendor firms and independent contractors have been privy to information leading up to the release of this RFP that bestows an uncompetitive advantage over other bidders. Will Canada name the vendors and independent contracts with whom it has contracted leading up to this RFP and confirm that these vendors and independent contracts are excluded from bidding against this requirement, either directly or indirectly through other firms? If Canada fails to exclude these firms and contractors in the interest of an open competition, can Canada confirm that they did not attend any meetings, have any discussions with SSC staff and were not given any information/documentation relating to this procurement that results in an unfair advantage?”	See answer #32