



**RETURN BIDS TO:**

**RETOURNER LES SOUMISSIONS À:**

**Bid Receiving - PWGSC / Réception des soumissions  
- TPSGC**

**Place du Portage, Phase III  
Core 0B2 / Noyau 0B2  
11 Laurier St., 11, rue Laurier  
Gatineau  
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 Transformation and Systems Integration  
Service/Division de transformation des opérations et  
d'intégrat  
Special Procurement Initiative Dir  
Dir. des initiatives spéciales  
d'approvisionnement  
11 Laurier, Place du Portage III  
12C1  
Gatineau  
Québec  
K1A 0S5

<b>Title - Sujet</b> Transformation Program Office (TPO)	
<b>Solicitation No. - N° de l'invitation</b> G9292-188396/B	<b>Amendment No. - N° modif.</b> 010
<b>Client Reference No. - N° de référence du client</b> G9292-188396	<b>Date</b> 2017-09-04
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$XE-677-31557	
<b>File No. - N° de dossier</b> 677xe.G9292-188396	<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 2017-09-11</b>	
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Chow, Mejuine	<b>Buyer Id - Id de l'acheteur</b> 677xe
<b>Telephone No. - N° de téléphone</b> (819) 420-0333 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<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/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)</b>	
<b>Signature</b>	<b>Date</b>

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## Request for Proposal (RFP)

### Solicitation Amendment: 010

This RFP amendment 010 has been raised to:

- A) Identify changes to the RFP.
- B) Respond to questions regarding the RFP.

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#### (A) CHANGES

##### **Change 29**

At Attachment 1 to Part 4 (p.4 of 44),

**DELETE:** 2.2.1.2 For C-M1, OR C-M2, one of the reference project(s) must be for a major public facing entitlement or a benefits or taxation program (as distinct from licensing or permitting programs).

**INSERT:** 2.2.1.2 For C-M1, OR C-M2, one of the reference project(s) must be for a major public facing entitlement or a benefits or taxation program (as distinct from licensing or permitting programs) in either the public or private sector.

##### **Change 30**

At Section A-1.2 of Annex A – Statement of Work:

**DELETE:** d. Expert Industry Panel Workshop (Milestone Deliverable #4) – estimate 2 per year or more

- i. Deliver presentation materials.
- ii. Deliver agenda(s); and
- iii. Deliver Record of Discussion(s).

The Contractor will deliver the expert industry panel workshops as per dates to be determined in the Project Authority approved version of the final Project Plan.

**INSERT:** d. Expert Industry Panel Workshop (Milestone Deliverable #4) – estimate 2 per year or more

- i. Deliver presentation materials.
- ii. Deliver agenda(s); and
- iii. Deliver Record of Discussion(s).

The Contractor will deliver the expert industry panel workshops as per dates to be determined in the Project Authority approved version of the final Project Plan.

The expert industry panel is considered an augmentation of the Leadership Team. While it is anticipated that resources from the Leadership Team will participate in the expert industry panel, it is also expected that the Contractor will leverage additional resources from within its global corporate practice to participate as required.

### **Change 31**

At Attachment 1 to Part 4,

Under criterion **LTPgM-PR1** (p.38 of 44),

**DELETE:** 2. Providing oversight to multiple projects within a program;

**INSERT:** 2. Providing oversight to multiple sub-projects, or work packages, within a project;

Under criterion **LTVM-PR1** (p.39 of 44),

**DELETE:** 2. Providing value management oversight to multiple projects within a program.

**INSERT:** 2. Providing value management oversight to multiple sub-projects, or work packages, within a project.

Under criterion **LTPS-PR1** (p.40 of 44),

**DELETE:** 2. Providing procurement support oversight to multiple projects within a program;

**INSERT:** 2. Providing procurement support oversight to multiple sub-projects, or work packages, within a project;

Under criterion **LTTA-PR1** (p.42 of 44),

**DELETE:** 2. Providing technology and architecture oversight to multiple projects within a program.

**INSERT:** 2. Providing technology and architecture oversight to multiple sub-projects, or work packages, within a project.

Under criterion **LTCM-PR1** (p.43 of 44),

**DELETE:** 2. Providing change management oversight to multiple projects within a program.

**INSERT:** 2. Providing change management oversight to multiple sub-projects, or work packages, within a project.

### **Change 32**

At Attachment 1 to Part 4, under criterion **LTTA-PR1** (p.42 of 44),

**DELETE:** 1. Support the selection and implementation of COTS based technology products and service strategies for contracts with estimated value greater than \$100M; and

2. Providing technology and architecture oversight to multiple sub-projects, or work packages, within a project.

The experience can be demonstrated using the same reference project(s) used in response to other point rated technical criteria.

The reference project(s) must each:

- a) Be for a client that is arm's length from the Bidder and not an affiliate of the Bidder;
- b) Have been a minimum duration of 12 months;
- c) Demonstrate that the project was completed, or substantially\* completed, within 5 years prior to the bid closing date of this RFP (Solicitation #G9292-188396/B); and
- d) Have a total project value of at minimum \$100 Million (CAD, foreign currency will be based on the Bank of Canada daily exchange rate of the bid closing date.

- 
- INSERT:**
1. Support the selection and implementation of COTS based technology products and service strategies for projects with estimated value greater than \$100M; and
  2. Providing technology and architecture oversight to multiple sub-projects, or work packages, within a project.

The experience can be demonstrated using the same reference project(s) used in response to other point rated technical criteria.

The reference project(s) must each:

- a) Be for a client that is arm's-length from the Bidder and not an affiliate of the Bidder;
- b) Have been a minimum duration of 12 months;
- c) Demonstrate that the project was completed, or substantially\* completed, within 5 years prior to the bid closing date of this RFP (Solicitation #G9292-188396/B); and
- d) Have a total project value of at minimum \$100 Million (CAD, foreign currency will be based on the Bank of Canada daily exchange rate of the bid closing date.

At Attachment 1 to Part 4, LTPS-PR1 (p.40 of 44),

- DELETE:**
1. Developing and executing procurement strategies for contracts with estimated values greater than \$100M;
  2. Providing procurement support oversight to multiple sub-projects, or work packages, within a project;
  3. Conducting options analysis of various procurement approaches and making recommendations for contracts based on past experience, lessons learned, and best practices;
  4. Establishing a vendor management oversight function;
  5. Implementing vendor performance measures; and
  6. Providing advice and expertise to structure and negotiate contracts.

- INSERT:**
1. Developing and executing procurement strategies for projects with estimated values greater than \$100M;
  2. Providing procurement support oversight to multiple sub-projects, or work packages, within a project;
  3. Conducting options analysis of various procurement approaches and making recommendations for projects based on past experience, lessons learned, and best practices;
  4. Establishing a vendor management oversight function;
  5. Implementing vendor performance measures; and
  6. Providing advice and expertise to structure and negotiate contracts.

### **Change 33**

At Annex H, under Project executive, sub-section H-14.1 Required Services, to rectify the numbering,

- DELETE:**
1. Providing leadership in adopting transformation methodologies.

- INSERT:**
13. Providing leadership in adopting transformation methodologies.

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## (B) QUESTIONS

### **Question: 45**

At Annex H, section 3 (p.4 of 16), further to MMQ.1, it is understood that there is a need to ensure appropriate level of experience of the team that would help Canada on this important project. However, in most consulting companies with the find of global experience and knowledge base Canada is looking for, a resource who has 5 years of experience of a topic, they would be a manager equivalent or higher. It is unrealistic to expect that the heavy lifting of the work would be delivered by manager equivalents, and it would not be cost-efficient for ESDC either.

Can Canada consider lifting the experience requirement Level 1 resources? If they are guided by resources on or off-site who have more experience, they should be able to deliver high quality work that would satisfy the quality requirements of ESDC.

### **Answer: 45**

The RFP is amended in Amendment 009 to include Level Junior (Jr.) resources with a minimum of 1 year of experience.

**Please see changes # 24, 25 and 26 in Amendment 009.**

### **Question: 46**

In the BDM Letter of Interest (LOI), Canada shared that an industry engagement process was planned for e-Account and that BDM would leverage this corporate solution. It is reasonable to anticipate that similar engagement with citizens and/or industry may be required to shape the BDM solution implementation LOI. Canada has not allowed for costs related to such engagement (e.g. recruiting, honoraria, facilities, etc.). Will Canada allow bidders to identify expenses related to Canada's citizen engagement strategy, at Canada's cost, anticipated to be required to complete the work related to the TPO over the period of the contract (up to 8.5 years, including option periods)?

### **Answer: 46**

As per Annex A- SOW, C-1.6, it is anticipated that the Contractor will provide expertise to support the execution of ESDC's BDM citizen engagement strategy. Reimbursement of any direct costs over and above normal operations identified by the Contractor in relation to the citizen engagement work will be negotiated via the TA approval process at Canada's discretion with no margin for profit.

### **Question: 47**

At Attachment 1 to Part 4 (p.4 of 44), the technical requirement 2.2.1.2 states that for C-M1 or C-M2, "one of the reference project(s) must be for a major public facing entitlement or a benefits or taxation program (as distinct from licensing or permitting programs)." Can Canada please confirm that this reference project can be from either public or private sector, as long as it meets the criterion described in 2.2.1.2?

### **Answer: 47**

Canada confirms that the reference project(s) described in Corporate Mandatory Technical criterion 2.2.1.2 can be from either public or private sector.

**Please see change #29.**

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**Question: 48**

What is the general expectation to be on site at ESDC, in terms of number of days per week for each type of role defined in the Mandatory requirements identified at Attachment 1 to Part 4, section 2.2.2 to 2.2.4?

**Answer: 48**

The Leadership Team resources must be available as required to fulfill the requirements under Section A of Annex A - Statement of Work.

Canada expects that the Program Manager will be available and onsite at ESDC on a full or near full time basis. All other members of the leadership team are expected to be regularly available and present on-site an average 2-3 days per month during the initial contract period.

Canada recognizes that there may be periods of higher activity and other periods of lower activity as outlined by the Contractor's project plan to be submitted as Milestone Deliverable #2.

**Question: 49**

Will Canada please confirm if the industry panel is in augmentation of the Leadership team or can it be composed of members of the Leadership Team?

**Answer: 49**

A response is offered in two segments. At Annex A, Section A – Leadership Team, Canada expressed the expectations for onsite presence and general availability for meetings and executive briefings for the members of the Leadership Team.

The industry panel is a deliverable identified in section A-1.2 of Annex A – Statement Of Work and is considered an augmentation of the Leadership Team. Canada does not require the membership of the expert industry panel to be present in-person in the NCR. Other forums of convening the expert panel are available and will be used as appropriate. Further to Question and Answer # 22 in Amendment 006, Canada will not be responsible for cost for travel of either the Leadership Team or Expert Panel.

**Please see change #30**

**Question: 50**

For proposed leadership team resources, at Attachment 1 to Part 4, Bidders are asked to provide client contact information (name of organization, contact name, email address, phone number) for each reference project. Given that these reference projects are from within the last 15 to 18 years and many of these clients have moved onto new organizations, retired, or are deceased, will Canada please consider modifying the requirement for client contact information for only those project references that were completed within the last 5 years?

**Answer: 50**

In accordance with section 4.2.4 of the RFP, the Bidder is requested to provide a client contact for each reference project in its bid. It is the responsibility of the Bidder to confirm in advance that their client contact for the project reference will be available to provide a response and is willing to provide a reference.

Canada recognizes that the original client contacts from past projects may no longer be available; however, it is requested that for the purposes of evaluation, Bidders provide a client contact who can verify and validate the information in the Bidder's bid response.

**Question: 51**

Please clarify if the level of effort in Form 3 - Part "B" to Part 4 for the initial contract period is representative of the effort required to (a) deliver the milestone deliverables for the Leadership Team outlined in Annex B - Price Schedule (p. 2 of 7), or (b) deliver work that is expected to be undertaken during the initial contract period that is over and above the effort required to deliver the defined deliverables?

**Answer: 51**

The estimated level of effort included in Form 3 – Part “B” to Part 4 is for evaluation purposes only and will not form part of the resulting contract. It is based on current best estimates for completing the work outlined in Annex A – SOW, Section A - Leadership Team, for which firm fixed prices have been allocated as per Tables 1 and 2 of Annex B – Price Schedule.

The inclusion of this data in the RFP does not represent a commitment by Canada. Although the cost of the Leadership Team is covered by the allocated funds, the Levels of Effort for the Leadership Team resources have been included in the initial contract period (column B) of Form 3 to maintain the integrity of the evaluation spreadsheet.

**Question: 52**

Will Canada please confirm whether the structure of the skill of the Project Executive is in fact designed to target a specific individual and/or firm.

**Answer: 52**

The structure of the skill set for the Leadership Team Resources, including the Project Executive, reflects Canada’s requirements and has not been designed to target any one specific individual or firm.

**Question: 53**

Given this is a social services program, we believe the experience—both of the Firm/Bidder and the Team/Resources—should relate to social services transformation projects.

Will Canada consider adding these requirements?

- On page 14 of 44, regarding LTPE M1 & M2, we recommend replacing the support of “business and IT transformation projects” with “social services transformation projects”
- On page 15 of 44, regarding LTPE M3, we recommend replacing the support of “IT and business transformation projects” with “major social services transformation projects”

**Answer: 53**

Canada is seeking a firm with major IT and business transformation experience. There are many benefit payment transformation examples, outside the social sphere, for which the experience would be relevant and applicable. The bidder should put forth reference(s) they feel have the most relevant and applicable experience to satisfy the requirements as outlined in the SOW.

As such, mandatory criteria LTPE M1, M2 and M3 will remain unchanged.

**Question: 54**

At Attachment 1 to Part 4 (p.24 and 19 of 44), C-PR2.1 and LTPS-M1 each have a requirement to demonstrate both procurement and contract management services. While consultants do regularly help clients with procurement and vendor management support, it is extremely rare that consultants provide contract management services as described in resource category H-12 of Annex H. Such responsibilities are typically performed in-house since having a consultant or vendor manage other vendors' contracts can lead to too many issues. We are unaware of any GC-led contracts where contract management of other vendors is outsourced. Will Canada please consider removing the LTPS-M1 requirement to map to Contract Management Support Services as defined under Annex H, H-12, as well as consider removing item #3 Contract Management Advice under C-PR2.1 (iii)?

**Answer: 54**

The role of the Procurement lead will not be to manage other vendors' contracts, but rather to provide advice and guidance to the GC-led vendor management team.

LTPS-M1 requires that the Bidder map the resources experience to at least 50% of the required services documented in *H-12 Procurement and Contracting Specialist*. The 50% requirement applies to the cumulative services identified in both the Procurement support services (1 through 8) and Contract management support services (1 through 6).

C-PR2.1 requires that the Bidder demonstrate experience in key areas, including procurement strategies, preparation of solicitation documents, or contract management advice. None of these require experience in carrying out contract management services.

As such, C-PR2.1 and LTPS-M1 will remain the same.

**Question: 55**

At Attachment 1 to Part 4, LTTA-PR1 requires the proposed Technology and Architecture Lead to provide up to 2 reference projects. Each reference project is further required to demonstrate that the Technology and Architecture Lead provided "technology and architecture oversight to multiple projects within a program." Because a project cannot simultaneously be a program, can Canada please confirm that Bidders are to demonstrate, for each reference project, that the Technology and Architecture Lead provided "technology and architecture oversight to multiple sub-projects, or work packages, within a project"?

**Answer: 55**

Canada confirms that Bidders should to demonstrate, for each reference project, that the proposed Leadership Team member provided oversight to multiple sub-projects, or work packages, within a project.

**Please see change # 31.**

**Question: 56**

At Attachment 1 to Part 4, LTTA-PR1 (p.42 of 44), this requirement reads in part:

1. *Support the selection and implementation of COTS based technology products and service strategies for contracts with estimated value greater than \$100M; and*
2. *Providing technology and architecture oversight to multiple sub-projects, or work packages, within a project.*

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*The experience can be demonstrated using the same reference project(s) used in response to other point rated technical criteria.*

*The reference project(s) must each:*

- a) Be for a client that is arm's length from the Bidder and not an affiliate of the Bidder;*
- b) Have been a minimum duration of 12 months;*
- c) Demonstrate that the project was completed, or substantially\* completed, within 5 years prior to the bid closing date of this RFP (Solicitation #G9292-188396/B); and*
- d) Have a total project value of at minimum \$100 Million (CAD, foreign currency will be based on the Bank of Canada daily exchange rate of the bid closing date.*

Please confirm that the word 'contracts' in item 1 above should be 'projects' in order to be consistent with the wording in the remainder of this requirement (i.e. item d) and the terminology used throughout the requirements for the Leadership Team. Please note that LTPS-PR1 also has the same inconsistent terminology.

**Answer: 56**

The term "projects" replaces "contracts" in the definition of reference projects described in LTТА-PR1. The term "projects" replace "contracts" for bullet #1 and #3 in criterion LTPS-PR1. Bullet #6 remains as "contracts".

**Please see Change # 32.**

**Question: 57**

At Attachment 1 to Part 4 (p.8 of 44), regarding the C-M3 (a) requirement that requests project details including "client contract reference number", can Canada please confirm that, similar to Amendment 006, Answer 29, "client contract reference number" is meant to refer to how the reference projects are numbered and/or referred to within the résumé, and that Bidders are not required to provide actual contract numbers for the reference projects?

**Answer: 57**

Canada confirms that "client contract reference number" refers to how the reference projects are numbered and/or referred to within the résumé. Bidders are not required but may provide actual contract numbers for the reference projects.

**Question: 58**

Given the volume of reference requests, our client has asked that prospective clients contact the responsible Project Executive, who would then provide Canada with the required information for the reference check. Can Canada confirm if this is acceptable?

**Answer: 58**

Canada confirms that it is acceptable to identify a Project Executive or a Bidder's contact (name and contact information) to provide Canada with the required information for the reference check. Please refer to Section 4.2.4 of the RFP for further details on reference checks.

**Question: 59**

Under H-14.1 Required Services for the Project Executive resource category in Annex H, the first two services listed are both numbered "1". Can Canada please confirm that these should be numbered sequentially, for reference purposes in preparing the Project Executive resume, such that the total number of required services for the Project Executive resource category is 13, and not 12?

**Answer: 59**

The total number of required services for the Project Executive resource category is 13. The sequential numbering for the Project Executive resource category in Annex H (H-14.1) has been amended.

**Please see Change # 33.**

**\*\*\* ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED \*\*\***