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11 Laurier St./11, rue Laurier

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

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 Systems Division (XL)/Division des systèmes
partagés (XL)

4C1, Place du Portage Phase III

11 Laurier St./11, rue Laurier

Gatineau

Québec

K1A 0S5

Title - Sujet LAC - Digital Asset Management	
Solicitation No. - N° de l'invitation 5Z011-170118/A	Amendment No. - N° modif. 003
Client Reference No. - N° de référence du client 5Z011-170118	Date 2017-09-05
GETS Reference No. - N° de référence de SEAG PW-\$\$XL-107-31720	
File No. - N° de dossier 107xl.5Z011-170118	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2017-10-05	
Time Zone Fuseau horaire Eastern Standard Time EST	
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Conn-Harbinson, Margo	Buyer Id - Id de l'acheteur 107xl
Telephone No. - N° de téléphone (873) 469-4663 ()	FAX No. - N° de FAX (819) 953-3703
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction:	

Instructions: See Herein

Instructions: Voir aux présentes

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

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QUESTIONS FROM BIDDERS
Dated 5 September 2017

QUESTIONS:

The following questions were received from bidders. To ensure consistency and quality of information provided to Bidders, significant enquiries received and the replies to such enquiries will be provided simultaneously to all Bidders to whom the bid solicitation has been sent.

QUESTION 2:

We do not clearly understand the requirement for services related to the implementation of the required Software as a Service (SaaS) solution.

- a. Would LAC please describe how they see their role, the successful bidder's role, and the role of any others in the provision of services to complete the activities requested under the RFP? To complete the entire configuration and implementation of the solution into production?
- b. For example, in our experience, implementing a Digital Asset Management System (DAMS), to meet the requirements for the scope and volumes provided in the RFP, will require a range of efforts, such as project management, change management, business analysis, fit/gap analysis, and solution design, development and testing for functionality not native to the selected software, integration with other systems, and migration of content into the solution. How does LAC plan to provide for such efforts?
- c. Will Task Authorizations be developed to procure such services from the successful bidder?
- d. If so, how will the gaps in skill sets and experience be addressed (for example: the required roles identified in the RFP do not include project management or change management capabilities)?
- e. Will there be a separate RFP for services?

RESPONSE 2:

LAC is seeking, as stated in Part 5, section 5.1 of the bid solicitation, an "off-the-shelf" or a commercially available solution. LAC will be leading the initiative.

- a. As per Part 7, Section 1.1.2 (f), implementation services includes initial set-up, installation, indexing and testing of the solution, up to and including System Acceptance testing. Any additional professional services required over and above the implementation of the solution will be raised via the Task Authorization process, as per Part 7, Section 2. The professional services requested through task authorization on an "as needed" basis will be for specific requirements that may arise in the future such as integrating the proposed solution with other systems, training, etc.
- b. These activities will be addressed internally at LAC.
- c. The Work or a portion of the Work to be performed under the Contract will be on an "as-and-when-requested basis" using a Task Authorization (TA), outside of Implementation, for the resource categories defined in Part 7, Section 33.3.
- d. LAC will be leading the project, supplemented by as and when requested professional services from the successful bidder that may be raised through the task authorization process.

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- e. There is no plan for a separate RFP at this time. This bid solicitation does not preclude Canada from using another method of supply.

QUESTION 3:

Would LAC please share information regarding the DAMS project organization (project team details, project governance bodies, etc.)?

RESPONSE 3:

LAC is not in a position to provide this information as it is not within the scope of the Bid Solicitation as per response 2 above.

QUESTION 4:

Please explain how LAC expects to engage the resources to be provided by the successful bidder and over what period of time. For example, will the bidder's resources be expected to fill roles in the project organization on a full-time or near full-time basis during the implementation period, or will they simply be called upon for ad hoc advice, troubleshooting, etc.?

RESPONSE 4:

Resources will be engaged through task authorizations on an "as needed" basis for specific periods of time. The professional services requested will be for specific requirements that may arise in the future such as integrating the proposed solution with other systems, training, etc. Time periods will be determined as future requirements are defined.

QUESTION 5:

Will the successful bidder have full accountability for the installation, setup and testing of the software? Please explain how LAC resources will assist in this effort and what has been put into place to mitigate any potential issues/constraints/challenges that may be encountered in order that the bidder can meet the identified timeline.

RESPONSE 5:

Yes, the successful bidder will have full accountability for the installation, setup and testing of the software. LAC will be part of the acceptance testing to approve the installation of the software.

QUESTION 6:

The RFI (solicitation #: 5Z011-160124/A) which preceded this RFP contained a broader scope and stakeholder group (i.e. provinces and territories) than what is specified in the RFP. What process and key decisions were taken to arrive at the scope of the RFP and LAC as the single stakeholder? What, if any, plans are in place or anticipated which will expand the user base of the proposed solution beyond LAC?

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RESPONSE 6:

The RFI addressed a broader scope, however the bid solicitation has a very specific goal of implementing a DAMS within LAC. LAC is the client for this bid solicitation.

QUESTION 7:

The RFP includes the requirement to provide the ability to ingest materials into the proposed solution. How does LAC anticipate migrating the data? Will data migration services for the Digital Curation Platform (DCP) be procured through a separate RFP?

RESPONSE 7:

Migration is out of scope for this current bid solicitation as per section 3.0 Scope of the Statement of Requirements.

QUESTION 8:

Has any prioritization been done to identify priority collections for ingestion? If so, please provide the prioritization and any related information so respondents to the RFP can consider the information in the development of the draft implementation, testing, and training plans.

RESPONSE 8:

No, priority collections have not been identified for ingestion. The draft implementation plan is specific to the installation of the proposed solution, acceptance testing, and the documentation stated as contract deliverables.

QUESTION 9:

We expect pre-ingest processing workflows will vary by type and source of data to be ingested. Please provide details on each of the workflows the proposed solution is expected to support, including number of unique workflow processes, description of the workflow, data types/sources to be accommodated by the workflow, etc. If this information is not available, how does LAC expect it to be defined/developed?

RESPONSE 9:

This activity will be implemented internally at LAC.

QUESTION 10:

RFP, Annex 3, item 3 (scope), page 65 states, "A managed file transfer and workflow automation solution is currently being procured by LAC."

- If the solution has been selected, please provide details on the solution.
- If not, what assumptions can LAC provide to the bidders regarding this 'to be determined' solution?
- How will this solution integrate/interface with the DAMS?

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RESPONSE 10:

- a. Yes, a solution has been selected. The output package from the solution will be flexible and can be tailored to suit any proposed DAMS solution that is provided with specifications and documentation.
- b. Not Applicable
- c. It is expected that files processed through the managed file transfer software can be automatically or manually transferred to the DAMS as defined in the scope.

QUESTION 11:

RFP, Annex 3, item 3 (scope), page 65 states "The overall implementation approach is based on Agile methodology principles and will be executed in small iterative steps with stakeholder participation, lessons learned, risk management and investment decision making processes." Annex C, item 4 indicates "completion of implementation, and System Acceptance Test, including Connectivity Testing" be completed 3 months following contract award.

- a. Has LAC defined the scope of each sprint to be completed within the 3 months?
- b. If so, would you please share this information with the bidders to inform their implementation plans?

RESPONSE 11:

- a. Sprints have not been defined. The draft implementation plan is specific to the installation, acceptance testing and the documentation stated as contract deliverables.
- b. Not Applicable

QUESTION 12:

Please clarify the Implementation Plan and System Acceptance Test Plan are solely focused on the initial 3- month software installation, setup and testing. Please confirm any subsequent configuration of the software, including workflow configurations, user interfaces, integration with source systems, etc. will NOT be included within these plans.

RESPONSE 12:

Yes, any subsequent configuration of the software including workflow configuration will not be included within the initial implementation plan and system acceptance test plan.

QUESTION 13:

Page 3 of the RFI which preceded the RFP indicated the intention "...to purchase Software as a Service (SaaS), with minimal customisations to effectively address the challenges and needs of digital curation". RFP, Part 1, 2.4, page 5 indicates "...proposed solution must be compatible with departmental policies and the technical environment of the Library and Archives Canada (LAC) (see Part 7, Annex A)". However, Annex A, item 1, page 58 indicates "LAC is beginning to implement an institution-wide initiative called the Digital Curation Initiative (DCI) to streamline the management and access of its digital collections. This includes the alignment of policies, processes, and digital infrastructure (Digital Curation Platform (DCP)) and will address the first five strategic goals of the Digital Strategy."

- a. Please provide the departmental policies so the bidders may assess their solution's compatibility with them.

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- b. What is the status of DCI in terms of considering changes to departmental policies and what is the impact of those changes for the DCMS solution which needs to be compatible with departmental policies?
- c. When implementing SaaS solutions, organizations typically are faced with business process changes to take advantage of the best practices upon which the solution is based and to avoid and/or minimize the requirement for customizations and/or workarounds. To what extent has LAC reviewed their business processes and considered how far/much they can be changed to suit the DAMS solution and thus avoid customisations and/or workarounds?
- d. Similarly, it may be in LAC's best interest to change a policy to take advantage of a solution's capabilities, adopt a best practice, and/or avoid customizations and/or workarounds. How would LAC approach this opportunity?

RESPONSE 13:

Please note the RFI is not a part of this bid solicitation process or resulting Contract clauses.

- a. The policies are addressed through functional capabilities which are formulated under requirements or contract clauses. All required policies are covered through the bid solicitation document.
- b, c, and d. LAC is not in a position to provide this information as it is not within the scope of this bid solicitation.

QUESTION 14:

What other similar institutions' DAMS solutions has LAC viewed or assessed? Which institutions have exemplary solutions and why does LAC feel these solutions are optimal?

RESPONSE 14:

A vast body of research is available on the subject, we do not wish to single out any specific institution or solution. Solutions will be evaluated as per Part 4 – Evaluation Procedures and Basis of Selection.

QUESTION 15:

Does LAC believe the organization has sufficient, skilled resources to effectively design, configure, test and deploy to production the DAMS solution, and maintain existing service levels, without the need for any additional resources?

RESPONSE 15:

Yes, LAC believes the organization has sufficient, skilled resources to effectively design, configure, test and deploy to production the DAMS.

QUESTION 16:

Annex A, 3: "The overall implementation approach is based on Agile methodology principles and will be executed in small iterative steps with stakeholder participation, lessons learned, risk management and investment decision making processes." This statement appears to be at odds with the requirement that the solution meet all mandatory requirements at the time of bid submission and with the suggested implementation timeline of 4 months. Is LAC open to bids that propose iteratively building a system integrating multiple components over a period longer than 4 months? If so, will solutions that do not meet all mandatory technical requirements at the time of bid submission but which include a plan for implementing all mandatory requirements be considered?

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RESPONSE 16:

No, an iteratively built system does not meet the requirements of the bid solicitation. As per question 1, LAC is seeking, as stated in Part 5, section 5.1 of the bid solicitation, an "off-the-shelf" or a commercially available solution. LAC will be leading the initiative.

No, a bid that includes a plan to meet the mandatory requirements of the bid solicitation will not be considered. As per Part 4, Section 2, 2.1.1 :

Bids must comply with each and every mandatory requirement. If a bid does not comply with a mandatory requirement, the bid will be considered non-responsive and will receive no further consideration.

QUESTION 17:

Annex A, 3: Please elaborate on how Classification Rules, Preferred File Format Rules and Transfer Agreement Rules in box 3 of the scope diagram are to be implemented. Is it anticipated that the user will be able to assign predefined rules at the point of ingest? Please describe the workflow that is expected at the time of initial installation versus enhancements that are to be added at a later date.

RESPONSE 17:

The ability to define rules related to the transfer and ingest of digital material has been defined in requirements (4.1.3, 4.2.3, 4.3.15).

The workflows will be configured internally at LAC. We consider the ability to define rules to be independent of the installation or subsequent enhancements.

QUESTION 18:

M3 Requirement for checking metadata schema compliance at the point of ingest. Which schemas does LAC require the DAMS to verify? Are they published schemas only, or do custom metadata from LAC document management system or other systems need to be checked for compliance against internal schemas?

RESPONSE 18:

As per 4.3.7, the solution must have the ability to support any metadata schema, international and custom.

QUESTION 19:

M9 "The system must provide a registry of file format information..." What does "provide" mean in this context? If the system assigns PRONOM identifiers to each ingested object and provides a PRONOM-based registry of rules and commands for format migration, is this sufficient to meet the requirement? Or does the DAMS have to store all of the information related to the format internally (e.g. a list of software that can read and write each format).

RESPONSE 19:

"Provide" in this context means that the registry is part of the solution and it must be able to add custom entries as per requirement 4.3.5 (the DAMS has to store it).

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QUESTION 20:

M11 "The system must support any international standard and custom XML metadata schema..." What does "support" mean in this context? Is it limited to the ability to import, search and display the metadata, or do users need to be able to enter the metadata using data entry templates in the system user interface? The requirement indicates "any" international standard – could LAC please be more specific about which standards need to be accommodated?

RESPONSE 20:

"Support" in this context means the ability to validate metadata (as per M11, the solution must have the ability to support any metadata schema, published or custom) against the corresponding metadata schema at the time of ingest, to import, search, and display the metadata and provide the ability to enter the metadata using data entry templates in the system user interface.