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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
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Issuing Office - Bureau de distribution

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Title - Sujet System Integration (SI) Services	
Solicitation No. - N° de l'invitation 59017-160009/B	Amendment No. - N° modif. 005
Client Reference No. - N° de référence du client 20161265	Date 2018-01-03
GETS Reference No. - N° de référence de SEAG PW-\$\$XS-005-31998	
File No. - N° de dossier 005xs.59017-160009	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2018-01-24	
Time Zone Fuseau horaire Eastern Standard Time EST	
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: McManus, Robert	Buyer Id - Id de l'acheteur 005xs
Telephone No. - N° de téléphone (819) 420-2230 ()	FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction:	

Instructions: See Herein

Instructions: Voir aux présentes

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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

System Integration Services for OSFI STTR Project, SBIPS RP# 59017-160009/B

Questions and Answers

QUESTION 23: When software is bundled into RFPs for Implementation Services, some vendors, are potentially unable to submit a response.

Since the Crown has already selected Microsoft Dynamics as the preferred case management tool for departments and agencies, and since there is already infrastructure and environments established for MS Dynamics, we believe it makes sense for OSFI to leverage existing license arrangements with Microsoft to build out the STTR solution.

Additionally, we suggest that software licenses could be purchased by the Government of Canada and negotiated at a lower cost than could be provided by resellers who will apply commissions and mark-ups. The Government of Canada may also have specific software terms and conditions (i.e. warranty provisions, support and service levels, etc..) within the MS Dynamics license arrangement that would be important for Canada to maintain after contract close out, but may not be included in other standard licensing agreements.

Furthermore, the Enterprise Planning Software could potentially be met by the Microsoft Dynamics CRM Project Service Automation (PSA) module available for the cloud version of Dynamics CRM, and the rich-text editing and spelling/grammar software can be met with popular and widely supported open source products such as TinyMCE (which is used by Adxstudio). This software would easily be procurable/obtainable by the Crown outside of this RFP.

ANSWER 23: The comments have been reviewed, the RFP remains unchanged. See also answer # 11.

QUESTION 24: "c) provide optional third party Enterprise Planning software and associated software maintenance and support services." Please confirm that the Enterprise Planning software is indeed optional. Several places in the document state that it is optional.

ANSWER 24: Confirmed. See also answer # 11.

QUESTION 25: Training environment was not explicitly requested, please confirm if OSFI would like contractor to set-up a training environment.

ANSWER 25: At present OSFI does not anticipate a requirement for a Training environment. However, per SOW sections 3.4.4 and 10.2, the Contractor may be requested (via TA) to provide the Technical Architecture support and advice required to support OSFI's as they undertake implementation of the STTR System Platform including a training environment if such a requirement is identified.

QUESTION 26: As OCM is OSFI led, is the contractor responsible for costs associated with all communications & training materials translations? If the answer to the previous question is yes, would OSFI please provide estimated number of communications and training materials (with ~word count or ~page count). Alternatively, would OSFI accept per diem (Time and Materials) if detailed translation requirements have not yet been defined?

ANSWER 26: As noted in SOW section 6.9, only some deliverables must be provided in a bilingual (English and French) format with the Contractor responsible for translation of the deliverables. Translation

costs will be included in future TAs and the basis of payment determined at that time. During the Development of the Deliverable Review and acceptance Process as part of TA#1 (SOW sections 6.8 and 9.5) the Contractor and OSFI will determine the acceptance criteria for Translated documents.

QUESTION 27: Please confirm preferred work location (Ottawa or Toronto) for the OCM Communication Specialist, Courseware Developer, Instructor and Translator roles.

ANSWER 27: The preferred location of all OCM work is Toronto where OSFI's Supervision OCM Team are located. The Translation services can be delivered from either location. Please note SOW section 6.1.2 d) which identifies that the Contractor's OCM Specialist must be available to meet regularly with the OSFI OCM Team on-site at OSFI in Toronto.

QUESTION 28: Please confirm the OCM software will be provided by OSFI e.g. Adobe Captivate to the courseware developer for software simulations/demonstrations, survey software etc.

ANSWER 28: If it is agreed, after contract award, that additional software is required to support the OCM activities, OSFI will provide the software.

QUESTION 29: Microsoft's strategy for mobile is based upon using the Cloud SAAS D365 CRM. The new mobile client tools are not available in the on-premise versions. Using the cloud based CRM would offer savings for a mobile strategy. Considering a mobile strategy; would the Crown consider using D365 CRM online?

ANSWER 29: The requirement is for licensed software and not SaaS.

QUESTION 30: Ref: 3.4.4. (b) A social networking tool such as Yammer is not in the list of deliverables. Social is a requirement mentioned elsewhere. Would OSFI consider a tool such as Yammer for internal social networking?

ANSWER 30: See answer #28.

QUESTION 31: Ref: 3.4.4. (b) Scenario Analysis Software. Would OSFI provide more definition of the requirements?

ANSWER 31: To clarify, most of the Architecture Work will be led by the Contractor whereas the Infrastructure Work will be the responsibility of OSFI's IT Services (ITSA) group. The Contractor's deliverables are detailed on SOW section 10.

QUESTION 32: Ref: 3.4.7 The diagram for Unstructured Data Migration indicates data being stored in D365 CRM and not in SharePoint using the OOTB integration. Is this what is intended?

ANSWER 32: As stated in SOW section 3.4.7 Data Migration Work, OSFI will be responsible for **data migration readiness** including creation of an interim data repository which will either house the data within SharePoint Lists and/or SQL Server data structures.

QUESTION 33: (a) OSFI does not have plans to move to O365, but the use of Government of Canada (GC) certified cloud offerings is looking more viable given the new cloud-centric GC IT strategy.' Would OSFI expand on this statement as to the likelihood and timing? (b) However out-of-the-box planning capability in Dynamics CRM is evolving rapidly in the cloud and could conceivably be offered on-premises within the STTR Project time frame for SD Track 1.' Would OSFI expand upon this statement as it greatly impacts the Enterprise Planning optional requirement. There is currently a tool from MS that is in D365 CRM cloud based implementations

ANSWER 33: See answer #29.

QUESTION 34: Attachment 4.1 – Technical Evaluation Criteria, requirement M-3. An associated high level Contractor Work Plan and Schedule (CWP&S) (as set out in SOW section 6.5 b)' is required within the stated section. Would OSFI please confirm that a high-level schedule and workplan up to WBS level 3 would be classified as 'high level' as section 4.2 to 4.5 requires detailed level?

ANSWER 34: Yes, a WBS to three levels (excluding the project name) would suffice for M-3.

QUESTION 35: There are significant advances in the Microsoft cloud offering for CRM that we feel would provide the Crown with more native/built-in functionality to some of OSFI's requirements and therefore drive an implementation with fewer add-ons/customizations and lower total cost of ownership for the platform. Will the Crown please advise if they would consider the cloud offering for Microsoft Dynamics 365/CRM for the STTR project?

ANSWER 35: See answer #29.

QUESTION 36: Requirement R-1.4 requests for references that were delivered with consultants that were co-located at the client office in Ottawa or Toronto. Our understanding of this requirement is that the Crown is interested in selecting a Bidder who can support OSFI's multi-site organization. As a global organization, we have offices in all major cities across Canada, including Toronto and Ottawa. Our CRM and SharePoint practices have a presence in both of these offices, and we're able to meet the Crown's requests without having demonstrated it through a specific reference. Will the Crown please consider removing this requirement in favour of having a Corporate requirement for a presence in Ottawa and Toronto?

ANSWER 36: The Request has been reviewed, the RFP remains unchanged. Please note that there is no minimum pass marks associated with rated criteria R-1 and R-2.

QUESTION 37: Section 4.4 of the RFP confirms that the Crown will be providing licenses for the "Rich Text Controls for CRM" and "Spelling/Grammar Checking Software" software, but there are several references throughout the RFP for the Bidder to provide the software. Would the Crown please remove these references? Example references found below:

- a. Section 4 "Optional Software Licences and Software Maintenance & Support" (page 221)
- b. Form 1, under "Licensed Software Maintenance and Support" (page 234)
- c. M-2 "Bidding Team" (page 242). This section also makes reference to SOW sections 8.2 and 8.3 which no longer seem to be in the RFP

ANSWER 37: As stipulated in SOW section 4.4.3, only the Enterprise Planning Software is within the Contractor's (optional) scope of work. The references to the provision, by the Contractor, of the Rich Text Controls for CRM and Spelling/Grammar Checking Software have been removed. Please refer to the RFP Changes contained in Amendments No. 3 and 4.

QUESTION 38: Per Amendment 2, the English version ended with the deletion of a requirement whereas the French version included the insertion of revised text. Could the client please confirm what the correct revised text should be in English?

ANSWER 38: To clarify, the final RFP change contained in Amendment 2 should read as follows (per English version and subsequently corrected in Amendment 3):

- At Page 1:
 - DELETE: 2018-01-10
 - And INSERT: 2018-01-24

QUESTION 39: In Annex A, Statement of Work, page 23 of 94, could you please give us an estimate on the number of tables/columns to be generated by the OSFI data migration team, based on documents to be migrated?

ANSWER 39: At time of RFP the Bidder is required to provide a Detailed Work Plan and associated Firm, Fixed Price for the Definition Phase Work for DM only; as such this information is not required at this time. This information will be determined during the Definition Phase for each DM Release and prior to the development of the TA(s) for Data Migration work to be delivered by the Contractor.

QUESTION 40: In Annex A, Statement of Work, page 23 of 94, could we please have an estimate of the volume on the data that will be generated in the interim data source?

ANSWER 40: See answer #39 above.

QUESTION 41: In Annex A, Statement of Work, page 24 of 94, it is indicated that the cleansing of the Unstructured data is performed by the OSFI Migration team. Is it also true for the structured data (MDH - SRA) (MDH - CID)?

ANSWER 41: Yes.

QUESTION 42: In Annex A, Statement of Work, page 64 of 94, Data migration - 13.1 item c: Collaborate with the OSFI team responsible for assessing data migration impacts to common components (e.g. MDH data source changes as a result of data migration from legacy sources to Dynamics CRM). Could you please precise what exactly this implies for the service provider?

ANSWER 42: As outlined in SOW section 3.4.7, OSFI is responsible for the Data Migration Readiness activities. OSFI anticipates that the Contractor can offer beneficial input and advice to OSFI, based on Best Practices and lessons learned, as to how OSFI should undertake these activities.

QUESTION 43: Reference PART 7 - RESULTING CONTRACT CLAUSES, 7.4 9b) (ii) 4003 (2010-08-16), Supplemental General Conditions - Licensed Software and (iii) 4004 (2013-04-25), Supplemental General Conditions - Maintenance and Support Services for Licensed Software.

Finding 3rd Party Software providers that have a compliant Enterprise Planning software solution and are willing to accept the SACC Manual 4003 and 4004 terms and conditions is very difficult. Not identifying a software partner leaves the Systems Integrator (SI) in the middle having to accept liability for IP not within its control; this is an unacceptable situation for the SI and leads to a no-bid response. To mitigate this no-bid scenario would OSFI:

- a) Agree to use the Enterprise Planning 3rd Party Software Provider's End User License Agreement (EULA) Terms and Conditions? Or
- b) Sever the 3rd Party Software requirement from the main Dynamics CRM STTR scope by making the 3rd Party Software an option for proponents to bid?

ANSWER 43: This question was also raised during the RFI process. However the modification of GC Standard Clauses has, in the past, caused significant confusion and concern amongst Bidders. The request has been reviewed, the RFP remains unchanged. Also see Answers # 11, 14 and 15.

RFP Changes:

1. At Attachment 3: Enterprise Planning Tool Functional Requirements, to Annex A, SOW:

INSERT:

Enterprise Planning Tool Functional Requirements (FRs)				
#	Requirement Category	Detailed Requirement Description	High Level Requirement	Requirement Priority
87	Interoperability	The Enterprise Planning Tool software must be capable of being integrated with Dynamics CRM to extend the functionality of Dynamics CRM.		Mandatory