



## SHARED SERVICES CANADA

### Request for Information for the Procurement Process for Information Technology Service Management (ITSM) Tool

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	<b>Postal Address</b>	Shared Services Canada 180 Kent Street, 13th Floor Ottawa, Ontario K1P 0B5	
<b>Closing Date and Time</b>	March 21, 2018 at 2:00 PM		
<b>Time Zone</b>	Eastern Standard Time (EST)		
<b>Destination of Goods/Services</b>	Not applicable – Request for Information Only		
<b>Email Address for Submitting your Response by the Closing Date</b>	<a href="mailto:ssc.pvrddprojects-arfprojetscd.spc@canada.ca">ssc.pvrddprojects-arfprojetscd.spc@canada.ca</a>		



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## 1. General Information

### 1.1 Introduction

- a) **Phase 1 of Procurement Process:** This Request for Information (RFI) is the first phase of a procurement process by Shared Services Canada (SSC) for an Information Technology Service Management (ITSM) Tool solution (the “**Project**”). Suppliers are invited to submit responses to assist Canada in refining its requirements for the Project. Suppliers are not required to submit a response to this RFI in order to participate in any later phases of the procurement process for the Project.
- b) **RFI Phase is not a Bid Solicitation:** This RFI is not a solicitation of bids or tenders. No contract will be awarded as a result of the activities undertaken during this RFI. Canada reserves the right to cancel any of the preliminary requirements described as part of the Project at any time during the RFI or any other phase of the procurement process. Given that the RFI process and any related procurement activity may be partially or completely cancelled by Canada, it may not result in any subsequent procurement processes.
- c) **Response Costs:** SSC will not reimburse any supplier or any of its representatives for any overhead or expenses incurred in participating in or responding to any part of the RFI phase. Suppliers are also responsible for carrying out their own independent research, due diligence and investigations (including seeking independent advice) that they consider necessary or advisable in connection with their participation in the RFI process and any future procurement process.

### 1.2 Overview of the Project

a) **Overview of Project:**

Shared Services Canada (SSC) is mandated to simultaneously operate and transform the Government of Canada's Information Technology (IT) infrastructure including email, data center and network services. SSC is responsible for the IT infrastructure for 43 departments and agencies and currently delivers services to over 300,000 users across the Government of Canada (GC).

SSC has embarked on a multi-year journey to fundamentally transform its capabilities, with Service Management being core components of the transformation. To ensure its services meet the requirements of customers, SSC is implementing a comprehensive service strategy that sets out how it will deliver enterprise IT infrastructure services, including roles and responsibilities and service targets. Central to this work is the launch of the SSC



Service Management Transformation Program that is aimed at fundamentally transforming SSC Information Technology Service Management (ITSM) capabilities.

In order for the SSC Service Delivery and Management Branch program to achieve its business outcomes, a requirement has been identified to replace SSC's current ITSM Toolset with a modern, scalable, state-of-the-art ITSM solution.

Through the contemplated RFP process, SSC is seeking to select a single Contractor to supply, implement and support a complete Enterprise ITSM Tool solution comprised of:

- Enterprise ITSM Tool COTS software;
- System Integration professional services required to implement the new ITSM Tool solution;
- Transition-out Services; and
- Application Management Services.

The solution will be implemented on premise, on SSC provided infrastructure, at GC Enterprise Data Centre Services locations. Refer to the *draft* Statement of Work (SOW) for additional details.

**Note:** SSC previously undertook a procurement process (#15-31240-0/A) for the provision of an ITSM Managed Service solution. That requirement was cancelled and has been replaced by this requirement for an on premise solution.

b) **Scope of Anticipated Procurement:**

i) **Potential Client Users:** This RFI is being issued by SSC. It is intended that the contract resulting from any subsequent solicitation would be used by SSC to provide shared services to one or more of its clients. SSC's clients include SSC itself, those government institutions for which SSC's services are mandatory at any point during the life of any resulting instrument(s), and those other organizations for which SSC's services are optional at any point during the life of any resulting instrument(s) and that choose to use those services from time to time. Any subsequent procurement process will not preclude SSC from using another method of supply for any of its clients with the same or similar needs, unless a subsequent solicitation for this Project expressly indicates otherwise.

ii) **Number of Contracts:** Canada is currently contemplating the award of 1 contract.

iii) **Term of any Resulting Contract:** Canada is currently contemplating

- (A) a contract period of 3 years, plus;
- (B) 4 option periods of one year each for System Integration Services; and
- (C) 6 option periods of one year each for Application Management Support.

c) **National Security Exception:** Canada has invoked the National Security Exception in respect of this requirement and, as a result, none of the trade agreements apply to this requirement.



### **1.3 Volumetric Data**

All information within this RFI and attached documentation has been provided to suppliers to assist them in understanding Canada's requirements, including but limited to the Volumetric Data contained in SOW section 3.3. It is provided purely for information purposes. Although it represents the best information currently available to SSC, Canada does not guarantee that the data is complete or free from error.

### **1.4 Submitting Questions**

Questions about this RFI can be submitted to the Contracting Authority at his or her email address identified on the cover page up until 5 working days before the closing date and time indicated on the cover page of this document. Canada may not answer questions received after that time.

Because this is not a bid solicitation, SSC will not necessarily respond to enquires in writing by circulating answers to all potential suppliers. During the RFI process, SSC will address only questions pertaining to the RFI process



## 2. Information Requested by Canada

### 2.1 Comments on Preliminary Documents

This RFI includes the following documents with respect to which Canada is seeking comments from suppliers:

- a) Draft version of the Statement of Work (SOW)
- b) Draft version of the Mandatory Technical Evaluation Criteria
- c) Draft version of the Financial Proposal (Pricing) Requirements
- d) Draft version of the specific draft resulting contract clauses

All documents reflecting Canada's anticipated requirements for this Project that are provided to suppliers during the RFI process are preliminary or draft requirements only and are subject to change. These requirements, or parts of them, may be updated before or during any subsequent solicitation.

Suppliers are requested to provide their comments, concerns and, where applicable, alternative suggestions regarding how the requirements or objectives described for the Project could be satisfied. Suppliers are also invited to provide comments regarding the content, format and/or organization of any draft documents provided with this RFI. Suppliers should explain any assumptions they make in their responses.

### 2.2 Responses to Questions for Industry

Canada requests responses to the following questions:

#### 1) Statement of Work (SOW)

Are there additional Contractor requirements that should be included in the SOW to ensure a successful project?

#### 2) Contractor Management and Oversight Service Requirements

SSC intends to establish a Per Diem Rate schedule for the Resource categories (listed in SOW 5.1.2) for future as and when requested work.

- a. Is the list complete for the type of work to be delivered under the contract; are the categories that should be added or removed?
- b. What are the advantages or disadvantages or defining levels of experience (e.g. Task-Based Informatics Professional Services (TBIPS) Level 1, 2 or 3) for applicable resource categories?
- c. To what extent are there local (National Capital Region (NCR)) professional services resources available with experience implementing the proposed Enterprise ITAM Tool software?

#### 3) Enterprise ITSM Tool Software Requirements



- a. Are there any Non-Functional or Functional requirements that would require customization (instead of configuration as defined in Section 10.6.1.1 of the draft SOW) of the proposed Enterprise ITSM Tool?
- b. Is there sufficient information regarding SSC's User Categories to propose appropriate licensing?
- c. Estimated (Minimum & Maximum) Number of Users - Is there sufficient information regarding the number of users to propose license pricing for initial SSC and Pilot Department implementation requirements as well as optional expansion GC-wide?
- d. What is the licensing model for the proposed ITSM Tool? Would an unlimited entity (GC-wide) license be a more cost effective solution for this requirement over the envisioned ten year period?
- e. At what point in the process must licenses be purchased for each of the instances (e.g. development, production, etc.)?
- f. SSC currently supports DB2 and Oracle as its Departmental database standards and is assessing its future direction.
  - i. Which Databases can be used with the proposed Enterprise ITSM Tool? Is there a preferred or recommended database product?
  - ii. Does the proposed Enterprise ITSM Tool software include the database licenses?
  - iii. If so, are there any restrictions on the use of the database?

#### **4) Hardware Specification Requirements**

- a. Is there sufficient information provided to enable the Bidder to specify the necessary infrastructure capacity required at time of RFP?
- b. In your opinion, is it an advantage or disadvantage for SSC to provide the infrastructure (versus the Contractor being responsible for provision of the Hardware Infrastructure)?

#### **5) Cloud Model**

It is SSC's intent to deploy the ITSM Solution on premise using a private cloud model (virtualized Infrastructure as a Service (IaaS)) or, possibility in the future, a commercial off premise cloud solution.

- a. Are there any challenges with this approach for your ITSM solution?
- b. What information would you require to be able to define and size the hardware capacity for the initial solution at RFP bid time?
- c. Would the deployment of the ITSM Solution on a private cloud environment, have any impact on the software licensing model?



- d. Does your organization have experience implementing and managing the proposed Enterprise ITSM Tool within a private on premise cloud and/or commercial cloud solution?

**6) Contractor Onboarding Requirements**

- a. Do you have concerns regarding the 90 (calendar) day timeframe to complete the stated Contractor Onboarding Requirements?
- b. In your opinion are there additional activities that should be completed as part of the Contractor Onboarding stage?

**7) Data Migration Requirements**

- a. Do you have any comments or concerns regarding SSC's envisioned approach described in Section 9.1 of the draft SOW?
- b. Do you have any comments or concerns regarding the Contractor's requirements in Section 9.2 of the draft SOW?

**8) ITSM Tool Implementation Requirements**

- a. In order to develop the Functional Design Specification and Configure / develop the Tool (as set out in Section 3.4.5 of the draft SOW) what data or output would you require from the Process Maturity Contractor (please provide list of data points or an example deliverable)?
- b. Are there any Security requirements that would prevent your company from responding to this RFP?
- c. Are there any Enterprise Data Centre (EDC) EDC Services Technical Integration requirements that would prevent your company from responding to this RFP?
- d. Are there any comments or concerns with respect to the Technical Integration Environment Provided by SSC for ITSM?

**9) Integration Requirements**

- a. Which of the existing integration points can be replaced (i.e. will not be required) with the implementation of the new tool?
- b. Is this sufficient information to propose an integration plan at time of RFP? If not, what additional details are required?
- c. Is this sufficient information to propose a firm price for the integration with i) Lightweight Directory Access Protocol (LDAP) repository and SAP financial system at time of RFP? If not, what additional details are required?

**10) Training Services Requirements**





- a. Do you offer different Training based on user types? Are there publically available training courses for the proposed ITSM Tool and, if so, who (user categories) is the training intended for?
- b. What Training courses are recommended for different roles?
- c. Is there a standard user guide available that can be used by SSC to develop end user training materials?
- d. What would you suggest for training internal SSC staff on the implementation of the ITSM Tool at SSC?
- e. Do you have any other comments or suggestions related to Training?

#### **11) Transition Services Requirements**

- a. Do you have any comments or concerns regarding the envisioned Transition requirements?
- b. At what point in time does the Vendor recommend that SSC transition?

#### **12) Application Management Support (AMS) Requirements**

- a. Are there any Application Management Support (AMS) requirements that would prevent your company from responding to this RFP?
- b. Are there any comments or concerns with respect to the draft AMS Service Levels and/or associated Penalties?

#### **13) Technical Evaluation Criteria**

- a. Are there any mandatory criteria contained in the draft requirements that would preclude your Company from submitting an otherwise compliant proposal?
- b. In your opinion, what is the minimum level of corporate experience that is required to successfully deliver this project?
- c. In your opinion, are there any additional mandatory requirements that SSC should include?

#### **14) Financial Proposal - Pricing Requirements for the Financial Evaluation Criteria**

- a. Is there sufficient information contained in the draft SOW (and its Appendices / Attachments) to provide Firm Unit Prices, at time of RFP, as reflected in the draft Financial Proposal (Pricing) Requirements?
- b. Is there sufficient information to enable the Bidder to provide a firm price at time of RFP to complete the Process Configuration Work (with no customizations) for Release Packages A, B & C (refer to Section 2.2.3 of the draft SOW)?



- c. To what extent can the Integration work be firm priced at time of RFP close based on the information already provided?
- d. Cost Estimate - Based on the draft documentation provided in this RFI, please select the response that in your opinion best describes the rough order of magnitude (ROM) cost estimate (i.e. -25% / +75%) for each of the following components of the draft requirements:
- (i) ITSM Software Licenses including maintenance, for 10 years, for SSC and Pilot Department:
    - <\$2,000,000
    - Between \$2,000,000 and \$4,000,000
    - Over \$4,000,000 and up to \$6,000,000
    - More than \$6,000,000
  - (ii) ITSM Software Licenses including maintenance, for 10 years, for GC-wide implementation:
    - <\$10,000,000
    - Between \$10,000,000 and \$20,000,000
    - Over \$20,000,000 and up to \$40,000,000
    - More than \$40,000,000
  - (iii) Professional Services to configure the ITSM Tool for SSC and Pilot Department:
    - <\$2,000,000
    - Between \$2,000,000 and \$5,000,000
    - Between \$5,000,000 and \$10,000,000
    - More than \$10,000,000



### 3. Supplier Responses

#### 3.1 Submitting a Response

- a) **Time and Place for Submission of Responses:** Suppliers interested in providing a response should submit it by email to the Contracting Authority at the email address for submitting a response identified on the cover page by the closing date and time identified on the cover page of this document.
- b) **Responsibility for Timely Delivery:** Each supplier is solely responsible for ensuring its response is delivered on time to the correct email address.
- c) **Identification of Response:** Each supplier should ensure that its name and return address, the solicitation number, and the closing date are included in the response in a prominent location. The supplier should also identify a representative whom Canada may contact about the response, including the person's name, title, address, telephone number and email address.

#### 3.2 Electronic Submission of Responses

- a) **Email Submission of Response:** Subject to Subsection (j), respondents must submit their responses by email in accordance with this Section by the date and time of closing to the email address identified on the cover page of this document as the "Email Address for Response Submission".
- b) **Format of Email Attachments:** The approved formats for email attachments are any combination of:
  - i) PDF attachments; and
  - ii) documents that can be opened with either Microsoft Word or Microsoft Excel.Respondents that submit attachments in other formats do so at their own risk.
- c) **Email Size:** Respondents should ensure that they submit their response in multiple emails if any single email, including attachments, will exceed 15 MB. Except as expressly provided below, only emails that are received at the Email Address for Response Submission by the closing date and time will be considered part of the response.
- d) **Time of Receipt:** All emails received at the Email Address for Response Submission showing a "received" time before the response closing date and time will be considered timely. In the case of a dispute regarding the time at which an email arrived at SSC, the time at which the response is received by SSC will be determined:
  - i) by the delivery time stamp received by the Respondent if the Respondent has turned on Delivery Status Notification for the sent email in accordance with RFC 1891 established by the Internet Engineering Steering Group (SMTP Service Extension for Delivery Status Notification); or
  - ii) in accordance with the date and time stamp on the SMTP headers showing the time of first arrival on a server used to provide the Government of Canada with email services, if the Respondent has not turned on Delivery Status Notification for the sent email.
- e) **Availability of Contracting Authority:** During the two hours leading up to the closing date and time, an SSC representative will monitor the Email Address for Response Submission



and will be available by telephone at the Contracting Authority's telephone number shown on the cover page of this document (although the SSC representative may not be the Contracting Authority). If the Respondent is experiencing difficulties transmitting the email to the Email Address for Response Submission, the Respondent should contact SSC immediately at the Contracting Authority's coordinates provided on the cover page of this document.

- f) **Email Acknowledgement of Receipt by SSC:** On the closing date, an SSC representative will send an email acknowledging receipt of each response (and each email forming part of that response, if multiple emails are received) that was received by the closing date and time at SSC's Email Address for Response Submission.
- g) **Delayed Email Bids:** SSC will accept an email response received in the first 24 hours after the closing date and time only if the Respondent can demonstrate that any delay in delivering the email to the SSC Email Address for Response Submission is due to Canada's systems. Responses received by email more than 24 hours after the closing date and time will not be accepted under any circumstances. As a result, Respondents who have tried to submit a response, but have not received an email acknowledging receipt from SSC shortly thereafter should contact the Contracting Authority so that they can determine whether or not the response arrived at the SSC Email Address for Response Submission on time.
- h) **Responsibility for Technical Problems:** Canada will not be responsible for:
  - i) any technical problems experienced by the Respondent in submitting its response, including emails that fail to arrive because they exceed the maximum email size of 15 MB or that are rejected or quarantined because they contain malware or other code that is screened out by SSC's security services; or
  - ii) any technical problems that prevent SSC from opening the attachments to the email(s). For example, if an attachment is corrupted or otherwise cannot be opened or cannot be read, it will be evaluated accordingly. Respondents will not be permitted to submit substitute attachments to replace any that are corrupt or empty or submitted in an unapproved format.
- i) **Hand-Delivered Responses:** All Respondents must attempt to submit their responses electronically. However, SSC will accept a hand-delivered response (either instead of, or as a back-up in addition to, the email response), in which case the following applies:
  - i) The hand-delivered response can be:
    - (A) a soft copy on CD-ROM, or DVD;
    - (B) a hard copy (i.e., printed on paper); or
    - (C) a combination of soft and hard copies,provided that any pricing tables that were provided by SSC to be completed by the Respondents are submitted as a soft copy.
  - ii) The hand-delivered response must be delivered by a representative of the Respondent in person or by a courier. SSC will not accept any bids delivered by regular mail.



- iii) The hand-delivered response must be received by an SSC representative before the closing date and time at the address shown on the cover page of this document (or an alternate location arranged with the Contracting Authority in writing).
- iv) SSC will only accept a hand-delivered copy of the response if the Respondent has coordinated delivery of that response with the Contracting Authority. As indicated above, an SSC representative will be available at the Contracting Authority's telephone number during the two hours before the closing date and time, including for the purpose of coordinating the receipt of hand-delivered responses (the Contracting Authority may also agree, at SSC's discretion, to be available at another time before the closing date and time to receive the response).
- v) The only circumstances in which SSC will accept a hand-delivered response after the closing date and time is if the Respondent can show that the SSC representative was unavailable to receive the hand delivered response at the coordinated time, or that no SSC representative was available at the Contracting Authority's telephone number (and no SSC representative responded to voicemail messages left at that telephone number) during the two hours leading up to the closing date and time.
- vi) SSC will consult the hand-delivered response only if there are problems with all or a portion of the response submitted by email by the closing date and time or if no email response is received by the closing date and time. If SSC consults the hand-delivered response, it will prevail over the electronically submitted response.

### 3.3 Confidentiality

If a supplier considers any portion of its response to be proprietary or confidential, the supplier should clearly mark those portions of the response as proprietary or confidential. Canada will treat the responses in accordance with the *Access to Information Act* and any other laws that apply.



## **4. Canada's Review of Responses**

### **4.1 Review of Responses**

Responses will not be formally evaluated. However, the responses received may be used by Canada to develop or modify any draft documents provided with this RFI and its procurement strategy. Canada will review all responses received by the RFI closing date and time. Canada may, in its discretion, review responses received after the RFI closing date and time.

### **4.2 Review Team**

A review team composed of representatives of Canada will review and consider the responses. Canada may hire any independent consultant(s), or use any Government resource(s), to review any response. Not all members of the review team will necessarily participate in all aspects of the review process.

### **4.3 Follow-up Activity**

Canada may, in its discretion, contact any suppliers to follow up with additional questions or for clarification of any aspect of a response where substantive feedback has been provided. Canada's follow-up may involve a request for a further written response or for a meeting with representatives of Canada to further discuss the respondent's recommendations. Respondents that do not provide substantive feedback will not be contacted.



## ANNEX A – DRAFT STATEMENT OF WORK

*(Attached Separately)*



Service | Innovation | Value

## ANNEX B – DRAFT FINANCIAL PROPOSAL (PRICING) REQUIREMENT

*(Attached Separately)*





Service | Innovation | Value

## ANNEX C – DRAFT MANDATORY TECHNICAL EVALUATION CRITERIA

*(Attached Separately)*



## ANNEX D – PROPOSED RESULTING CONTRACT CLAUSES

*SSC anticipates providing the proposed resulting contract clauses later in the RFI process*