

# TECHNICAL EVALUATION CRITERIA

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## 1. Mandatory Evaluation Criteria - Corporate Qualifications

### M-1 Bidding Team

- a) The Bidder must identify its Bidding Team by providing the name of the Prime Contractor and a list of all sub-contractor organization(s).
- b) The Bidder must describe the proposed high-level role and responsibilities of each member of the Bidding Team with respect to fulfilling each of the areas of requirements described in Statement of Work (SOW), including but not limited to:
  - i. IM/IT Professional Services (i.e. ITSM Tool Implementation, Data Migration, Integration, SOW 5, 7-12 and 15);
  - ii. Training services (SOW 13);
  - iii. Application Management Support (SOW 16);
  - iv. Enterprise ITSM Tool Software (SOW 6.1);and
  - v. Database Software (*TBD – if required in final RFP*).

**Note:** Sub-contractor organizations do not include individual independent contractor resources proposed to fulfill Contractor Project Management Team or Contractor Work Team roles.

### M-2 Corporate Experience, Enterprise ITSM Tool Software Configuration and Implementation

The Bidder must provide two Customer Reference Contracts that demonstrate the Bidding Team's experience in the configuration and implementation of the proposed Enterprise ITSM Tool COTS software.

To be compliant, **each** of the two Customer Reference Contracts provided **must**:

- i) Have been delivered by the same Bidding Team Member proposed to lead the delivery of the ITSM Tool Implementation and Integration services for SSC (as described in SOW SOW 5, 7-12 and 15);
- ii) Have been completed within five years preceding the issuance date of this RFP, or if still ongoing the Customer Reference Contract must have been in place for a minimum of twelve months preceding the issuance date of this RFP;
- iii) Have billed a minimum of \$6M (Canadian, including taxes) under the Customer Reference Contract as of the issuance date of this RFP; and
- iv) Included completion, as of the issuance date of this RFP, of the following:
  - a. Development of the Detailed Design;
  - b. Configuration of the proposed ITSM software to support at least five ITSM processes; and
  - c. Interfaces to other corporate systems including, at a minimum:
    - i) Lightweight Directory Access Protocol (LDAP) repository, or
    - ii) Financial system (e.g. SAP).

### M-3 Corporate References, Enterprise ITSM Tool Software

The Bidder must provide three Customer Reference Projects from the Software Publisher that demonstrate the maturity of the proposed Enterprise ITSM Tool software.

To be compliant, **each** of the three Customer Reference Projects provided **must**:

- i) Have been deployed and accepted by the client within five years preceding the issuance date of this RFP;
- ii) Have been deployed to support an organization with a minimum of 3,000 employees; and

- iii) The COTS Software Publisher (ITSM Tool) delivered ongoing software maintenance and support services for the Enterprise ITSM Tool software on a monthly or annual contract basis and included, at a minimum, the following services:
  - a. COTS Software Product Updates;
  - b. Notice of Correction and Defaults; and
  - c. Telephone Support.

And, where at least one of the three reference projects:

- i) Was deployed to support a large scale organization with a minimum of 100,00 employees (although not all 100,000 employees will have a need to use the ITSM software); and
- ii) Was deployed as part of a bilingual implementation (i.e. any two languages).

## **2. Mandatory Evaluation Criteria – Proposed Approach**

### **M-5 High-level Overview of Bidders Proposed Approach, Contractor Work Plan and Schedule**

The Bidder must provide:

- a) a high level overview of its proposed approach, and
- b) an associated high level Contractor Work Plan and Schedule (CWP&S) (as set out in SOW section 5.5)

to deliver the Contractor's Scope of Work as summarized in SOW section 4 and further defined in SOW sections 5 to 16.

The Bidder's proposed CWP&S may reflect recommended approaches which, based on the Bidder's methodologies and experience, will improve on SSC's envisioned approach and mitigate specific risks associated with an ITSM Tool implementation initiative of this nature.

### **M-6 Detailed Work Plan for Contractor Onboarding**

The Bidder must provide a Detailed Work Plan for the work to be conducted within 90- days of Contract Award, as set out in SOW section 8, Contractor Onboarding, and in accordance with the firm fixed cost specified in the Bidder's Financial Proposal for the Contractor Onboarding work.

The Detailed Work Plan for Contractor Onboarding should include:

- a) A narrative description of the approach that the Bidder proposes to utilize to initiate the project and develop an mutually acceptable detailed Contractor Work Plan and Schedule for the Enterprise ITSM Project (It is suggested that this narrative description does not exceed 4 pages);
- b) Work Breakdown Structure (WBS), to a minimum of three levels\*, which identifies the tasks and activities the Bidder proposes to conduct to complete each deliverable identified in section 8 of the SOW;
- c) Proposed schedule, in Microsoft Project, including milestones and interdependencies;
- d) Resource plan which details the Bidder's personnel required to complete the deliverables, including the level of effort (LOE) (in days) by individual resource. The resource plan must clearly identify the proposed LOE of Contractor's Core Delivery Team resources proposed in response to requirement #M-12 and the Contractor Project Management Team resources versus other additional resources the Bidder deems necessary to complete Contractor Onboarding; and

- e) Dependencies required from SSC, after contract award, to enable the delivery of the required work (i.e. requirements of Canada to meet the plan, e.g. access to specific SSC Project staff, additional documentation beyond that listed in SOW section 8).

\*Note: The overall Project name (Enterprise ITSM Tool Project) is not included in the three levels.

#### **M-7 Detailed Work Plan for Development of Data Migration Plan**

The Bidder must provide a Detailed Work Plan for the development of the Data Migration Plan as set-out in section 9.2.1 of Annex A, SOW. The Work Plan must reflect the firm fixed cost specified in the Bidder's Financial Proposal for development of the Data Migration Plan.

The Detailed Work Plan for Contractor Onboarding should include:

- a) A narrative description of the approach that the Bidder proposes to utilize to initiate the project and develop an mutually acceptable detailed Contractor Work Plan and Schedule for the Enterprise ITSM Project (It is suggested that this narrative description does not exceed 4 pages);
- b) Work Breakdown Structure (WBS), to a minimum of three levels\*, which identifies the tasks and activities the Bidder proposes to conduct to complete each deliverable identified in section 8 of the SOW;
- c) Proposed schedule, in Microsoft Project, including milestones and interdependencies;
- d) Resource plan which details the Bidder's personnel required to complete the deliverables, including the level of effort (LOE) (in days) by individual resource. The resource plan must clearly identified the proposed LOE of Contractor's Core Delivery Team resources proposed in response to requirement #M-12 and the Contractor Project Management Team resources versus other additional resources the Bidder deems necessary to complete Contractor Onboarding; and
- e) Dependencies required from SSC, after contract award, to enable the delivery of the required work (i.e. requirements of Canada to meet the plan, e.g. access to specific SSC Project staff, additional documentation beyond that listed in SOW section 8).

\*Note: The overall Project name (Enterprise ITSM Tool Project) is not included in the three levels.

#### **M-8 Detailed Work Plan for Development of Transition Plan**

The Bidder must provide a Detailed Work Plan for the development of the Transition Plan as set-out in section 15.1 of Annex A, SOW. The Work Plan must reflect the firm fixed cost specified in the Bidder's Financial Proposal for development of the Transition Plan.

The Detailed Work Plan for Contractor Onboarding should include:

- a) A narrative description of the approach that the Bidder proposes to utilize to initiate the project and develop an mutually acceptable detailed Contractor Work Plan and Schedule for the Enterprise ITSM Project (It is suggested that this narrative description does not exceed 4 pages);
- b) Work Breakdown Structure (WBS), to a minimum of three levels\*, which identifies the tasks and activities the Bidder proposes to conduct to complete each deliverable identified in section 8 of the SOW;
- c) Proposed schedule, in Microsoft Project, including milestones and interdependencies;
- d) Resource plan which details the Bidder's personnel required to complete the deliverables, including the level of effort (LOE) (in days) by individual resource. The resource plan must clearly identified the proposed LOE of Contractor's Core Delivery Team resources proposed in response to requirement #M-12 and the Contractor Project Management Team resources versus other additional resources the Bidder deems necessary to complete Contractor Onboarding; and

- e) Dependencies required from SSC, after contract award, to enable the delivery of the required work (i.e. requirements of Canada to meet the plan, e.g. access to specific SSC Project staff, additional documentation beyond that listed in SOW section 8).

\*Note: The overall Project name (Enterprise ITSM Tool Project) is not included in the three levels.

### **M-9 Detailed Work Plan for Integration of Standard Applications**

The Bidder must provide a Detailed Work Plan to design and implement the integration of the ITSM Tool with four standard applications (i.e. Active Directory, P2P, Sigma, Your Email Service) as set-out in section 11 of Annex A, SOW. The Work Plan must reflect the firm fixed cost specified in the Bidder's Financial Proposal for integration of each of the four standard applications with the ITSM Tool.

The Detailed Work Plan for Contractor Onboarding should include:

- a) A narrative description of the approach that the Bidder proposes to utilize to initiate the project and develop an mutually acceptable detailed Contractor Work Plan and Schedule for the Enterprise ITSM Project (It is suggested that this narrative description does not exceed 4 pages);
- b) Work Breakdown Structure (WBS), to a minimum of three levels\*, which identifies the tasks and activities the Bidder proposes to conduct to complete each deliverable identified in section 8 of the SOW;
- c) Proposed schedule, in Microsoft Project, including milestones and interdependencies;
- d) Resource plan which details the Bidder's personnel required to complete the deliverables, including the level of effort (LOE) (in days) by individual resource. The resource plan must clearly identified the proposed LOE of Contractor's Core Delivery Team resources proposed in response to requirement #M-12 and the Contractor Project Management Team resources versus other additional resources the Bidder deems necessary to complete Contractor Onboarding; and
- e) Dependencies required from SSC, after contract award, to enable the delivery of the required work (i.e. requirements of Canada to meet the plan, e.g. access to specific SSC Project staff, additional documentation beyond that listed in SOW section 8).

\*Note: The overall Project name (Enterprise ITSM Tool Project) is not included in the three levels.

## **3. Mandatory Evaluation Criteria – Contractor Organization and Proposed Resources**

### **M-10 Contractor Governance Structure**

The Bidder must provide a high level description detailing how it proposes to organize itself to manage and deliver the requirements set-out in the Statement of Work (SOW). The Bidder's response must include:

- a) A Project Organization chart depicting its proposed Contractor Governance Structure as stipulated in SOW 5.1. The organization chart should clearly identify key positions; the positions which are designated to interface between the Contractor's organization and SSC's Governance Structure; and the name of individuals proposed to fulfill such positions during the Contract.
- b) A description of the governance model the Bidder proposes to use to manage the Work to be delivered under the Contract, including the Work performed by its sub-contractors. The proposed model should address the Bidder's internal processes for managing escalation and resolution of issues and disputes between the Bidder and its sub-contractors, as well as between the Bidder and Canada.

## **M-11 Contractor Project Management Team**

Using the Resource Job Categories set out under Section 5.12 of the SOW, the Bidder must propose a dedicated Contractor Project Management Team to deliver the Contract Management Work described under section 6 of the attached SOW for the initial 12 month period of the Contract. The Bidder's response must include, but not be limited to:

- a) Identification of the individual proposed to fulfill the role of Contractor PM (Note: The Contractor PM will be further evaluated in M-12 below);
- b) The number of resources under its proposed Contractor Project Management Team, broken down by Resource Job Category;
- c) The associated percentage of each proposed resources time that will be dedicated to the Contractor Project Management Team; and
- d) A brief description of the role that each proposed resource will provide as part of the Contractor Project Management Team.

**Note:** The proposed Contractor Project Management Team must reflect the firm monthly fee, for the initial 36 months of the contract, as specified in the Bidder's Financial Proposal. Subsequent TA(s) will be issued for ongoing Project Management work.

## **M-12 Contractor's Core Delivery Team**

As stated in the SOW, the composition of the Contractor's Core Delivery Team, and the level of effort associated with each resource for each associated TA may differ during the performance of each specific TA under the Contract (Refer to SOW article 6.1.2 for additional details regarding the Contractor Delivery Team requirements). The Bidder must propose a qualified resource to fulfill each of the following Contractor Work Team roles as set out in SOW sections 5.1 to 5.3:

- i. Contractor Project Manager;
- ii. Solution / Application Architect; and
- iii. Integration Specialist.

### **Notes:**

- 1) When responding to M-12, the Bidder should fully complete the tables below (as applicable) for each of the three proposed resources. Résumés are not required for the proposed resources.
- 2) The Bidder must propose one resource to fulfill each role, if more than one resource is proposed to fulfill a single role, Canada will only evaluate the first proposed resource in the order in which they are set out in the Bid.
- 3) The Bidder is requested to include complete Customer Reference Project information as indicated in the table. Canada reserves the right to request Customer Reference Project contact information, at any time during the evaluation process, for the purposes of verification in accordance with the process set out under section 4.5 of PART 4 of this RFP.
- 4) If more than one resource is proposed to fulfill a Core Delivery Team role, Canada will only evaluate the first resource in the order in which they are set out in the Bid.

**M-12.1 Contractor Project Manager**

<b>M-12.1 Proposed Contractor Project Manager</b>		Bidder to insert name of proposed Resource	
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Bidder's Response</b>	
		<b>Substantiation of Technical compliance</b>	<b>Reference to applicable additional supporting documentation within the Bidder's Bid.</b>
<b>M-12.1.1</b>	<p>The Bidder must provide two Customer Reference Projects which demonstrate that the proposed Contractor PM resource managed and delivered an enterprise-wide IM/IT business transformation project utilizing one or more COTS products.</p> <p>For each Customer Reference Project to be considered:</p> <ul style="list-style-type: none"> <li>i. The Customer Reference Project must have had a minimum budget of \$6,000,000. (Canadian including taxes);</li> <li>ii. The Customer Reference Project must have been under the direct management of the proposed Contractor Project Manager resource; and</li> <li>iii. The proposed Contractor Project Manager resource must have provided the project management services to the Customer Reference Project for a minimum duration of twelve months within the five years preceding the issuance date of this RFP.</li> </ul>		

**M-12.2 Solution / Application Architect**

<b>M-12.2 Proposed Solution / Application Architect</b>		Bidder to insert name of proposed Resource	
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Bidder's Response</b>	
		<b>Substantiation of Technical compliance</b>	<b>Reference to applicable additional supporting documentation within the Bidder's Bid.</b>
<b>M-12.2.1</b>	<p>The Bidder must provide two Customer Reference Projects which demonstrate that the proposed Solution / Application Architect resource developed the logical and physical architecture for an implementation of the proposed Enterprise ITSM Tool software.</p> <p>For each Customer Reference Project to be considered:</p> <ul style="list-style-type: none"> <li>i. The logical and physical architecture included traceability from the Business Requirements and Non-Functional Requirements to the Solution Architecture;</li> <li>ii. The system development component of the overall Customer Reference Project budget must have been a minimum of \$6,000,000. (Canadian including taxes); and</li> <li>iii. The proposed Solution / Application Architect resource must have provided the architecture services to the Customer Reference Project for a minimum duration of six months within the five years preceding the issuance date of this RFP.</li> </ul>		



**M-12.3 Integration Specialist**

<b>M-12.3 Proposed Integration Specialist</b>		Bidder to insert name of proposed Resource	
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Bidder's Response</b>	
		<b>Substantiation of Technical compliance</b>	<b>Reference to applicable additional supporting documentation within the Bidder's Bid.</b>
<b>M-12.3.1</b>	<p>The Bidder must provide two Customer Reference Projects which demonstrate that the proposed Integration Specialist resource developed and implemented the integration design for the integration of the proposed Enterprise ITSM Tool software with a minimum of three other systems.</p> <p>For each Customer Reference Project to be considered:</p> <ul style="list-style-type: none"> <li>i. The system development component of the overall Customer Reference Project budget must have been a minimum of \$6,000,000. (Canadian including taxes); and</li> <li>ii. The proposed Integration Specialist resource must have provided the architecture services to the Customer Reference Project for a minimum duration of six months within the five years preceding the issuance date of this RFP.</li> </ul>		

#### 4. Mandatory Evaluation Criteria – Proposed 3<sup>rd</sup> Party Software

##### M-13 Proposed Enterprise ITSM Tool Software

- a) The Bidder must identify the Enterprise ITSM Tool software product, including the currently available version number, proposed to meet the Non-Functional and Functional Requirements set out in Appendices 1 and 2, respectively, to the SOW.
- b) The Bidder must respond to each of the Functional Requirements for the Enterprise ITSM Tool software using the Software Response Table #1 contained in Attachment 1 to this document.

### ATTACHMENT 1 TO TECHNICAL EVALUATION CRITERIA: Proposed Enterprise ITSM Tool Software Response Table

**Table #1 - Enterprise ITSM Tool Software, FR Mandatory Response Table**

The Bidder should complete Table #1 as follows:

- a) Under column D titled “Included in Bid (Y/N)”, for each associated Functional Requirement (FR) listed under column C, the Bidder must insert “Yes” or “No” to indicate if the Functional Requirement is included in the Bidder’s Financial Proposal;
- b) Under column E titled “Part #”, for each associated Functional Requirement listed under column C, the Bidder must insert its proposed Enterprise ITSM Tool’s software part #, associated with the current version of the software as identified in response to criteria #M-13, which provides for the associated Functional Requirement.

Table #1 – Enterprise ITSM Tool Software Functional Requirements (FR) Mandatory Response Table				
A	B	C	D	E
ID	Name	FR Description	Included in Bid (Y/N)	Part #
		<i>Note: In final RFP Table #1 will be populated with FRs contained in Appendix 2 to SOW</i>		

*Note to RFI Respondents: The Final RFP will include point-rated criteria to further evaluate and score the information provided in response the above requirements*