



**RETURN BIDS TO:**

**RETOURNER LES SOUMISSIONS À:**

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

**11 Laurier St. / 11, rue Laurier**

**Place du Portage, Phase III**

**Core 0B2 / Noyau 0B2**

**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**

**Vendor/Firm Name and Address**

**Raison sociale et adresse du  
fournisseur/de l'entrepreneur**

**Issuing Office - Bureau de distribution**

Communication Procurement Directorate/Direction de  
l'approvisionnement en communication  
360 Albert St./ 360, rue Albert  
12th Floor / 12ième étage  
Ottawa  
Ontario  
K1A 0S5

<b>Title - Sujet</b> Telephone Services/Contact Centre S	
<b>Solicitation No. - N° de l'invitation</b> G9292-170324/C	<b>Amendment No. - N° modif.</b> 001
<b>Client Reference No. - N° de référence du client</b> G9292-17-0324	<b>Date</b> 2018-10-16
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$SCY-007-75582	
<b>File No. - N° de dossier</b> cy007.G9292-170324	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2018-11-16</b>	<b>Time Zone</b> Fuseau horaire Eastern Standard Time EST
<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> Westall, Susan	<b>Buyer Id - Id de l'acheteur</b> cy007
<b>Telephone No. - N° de téléphone</b> (613) 949-8350 ( )	<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 (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>



Employment and  
Social Development Canada

Emploi et  
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Canada

# **1 800 O-Canada Contact Centre Services**

## **Request for Qualification Information Session**

**17 October 2018**

# Objectives of Information Session

1. **Introductory Remarks**
2. **Background and Project Overview**
3. **Procurement Process**
4. **Questions and Answers**



# 1. Introductory Remarks

- This session will be recorded for reference.
- All materials will be posted in both official languages on [buyandsell.gc.ca](http://buyandsell.gc.ca) following the session.
- In case of discrepancy, RFQ documents take precedence over information provided at this session.



# Introduction of the Project Team

- Project's management is under the direction of:
  - Employment and Social Development Canada:  
Technical Authority
  - Public Services and Procurement Canada:  
Procurement Authority
- BDO Interis has been engaged as a consultant for the Project.
- Fairness Monitoring Services provided by KPMG.



## 2. Background and Project Overview

Since 1982, ESDC has been using alternative service delivery contracts, competitively tendered, to provide the human resources required for the management and delivery of the GC Telephone General Enquiries Services Program, which includes:

- **1 800 O-Canada**, which is the primary toll-free service for general information on GC programs, services and initiatives, and a critical public communication service in the Federal Emergency Response Plan
- **Customized Information Services (CIS)**, which deliver a variety of communication services on behalf of other GC clients on a cost-recovery basis

The 1 800 O-Canada Contact Centre is currently partially outsourced, as only the staff is contracted out. Workstations, facilities, service delivery support tools and IT are provided by ESDC.

**The current contract expires on November 29, 2019.**

ESDC is proceeding with the procurement of a new contract for Contact Centre Services that will include facilities and workstations, in addition to staff and capacity management.



# Project Overview

- The Appendix J “Statement of Requirements” (SOR) sets out the draft high-level requirements for the Contact Centre Services, including the strawman technical environment, project implementation approach and master project schedule. It also provides an overview of the current 1 800 O-Canada and CTS services and service delivery, including in Appendix J.1: Historical Contact Centre Volumetrics and Staffing.
- This information is provided for information purposes. The final SOR will be released with the Request for Proposal.



# Short Term Project Objectives

Quality of service	Maintain service delivery	<ul style="list-style-type: none"> <li>✓ replace the current private-public arrangement with a new one that continues to effectively and efficiently deliver 1 800 O-Canada and CIS where such services are delivered in accordance with the quality and performance measures established in the associated contract</li> <li>✓ maintain or improves the historically successful track record in delivering service results according to the performance framework established (which includes defined qualitative and quantitative standards) while maintaining flexibility and scalability of resources-on-demand to deliver on new or urgent GC service requirements</li> <li>✓ provide continuity of services between the current and successor service provider(s) – with a targeted cutover to live service in October of 2019 and some overlap of service between the current and new service contracts to best manage the transition of services and a seamless experience to Canadians</li> </ul>
	Support ESDC's service strategy	<ul style="list-style-type: none"> <li>✓ maintain or improve interoperability with ESDC and other GC contact centres</li> <li>✓ offer new capabilities to support future GC service delivery goals and outcomes, as they are funded and included in the contract.</li> </ul>
Cost	Provide value for money	<ul style="list-style-type: none"> <li>✓ maintain or improve value for money</li> </ul>
Risks	Balance risks	<ul style="list-style-type: none"> <li>✓ balance risks between the vendor and Canada, in particular as it relates to capacity and demand management</li> <li>✓ meet the security requirements of Canada</li> <li>✓ meet the business continuity requirements of Canada (and improve on current situation where all facilities are located in Ottawa and therefore not geographically dispersed)</li> </ul>





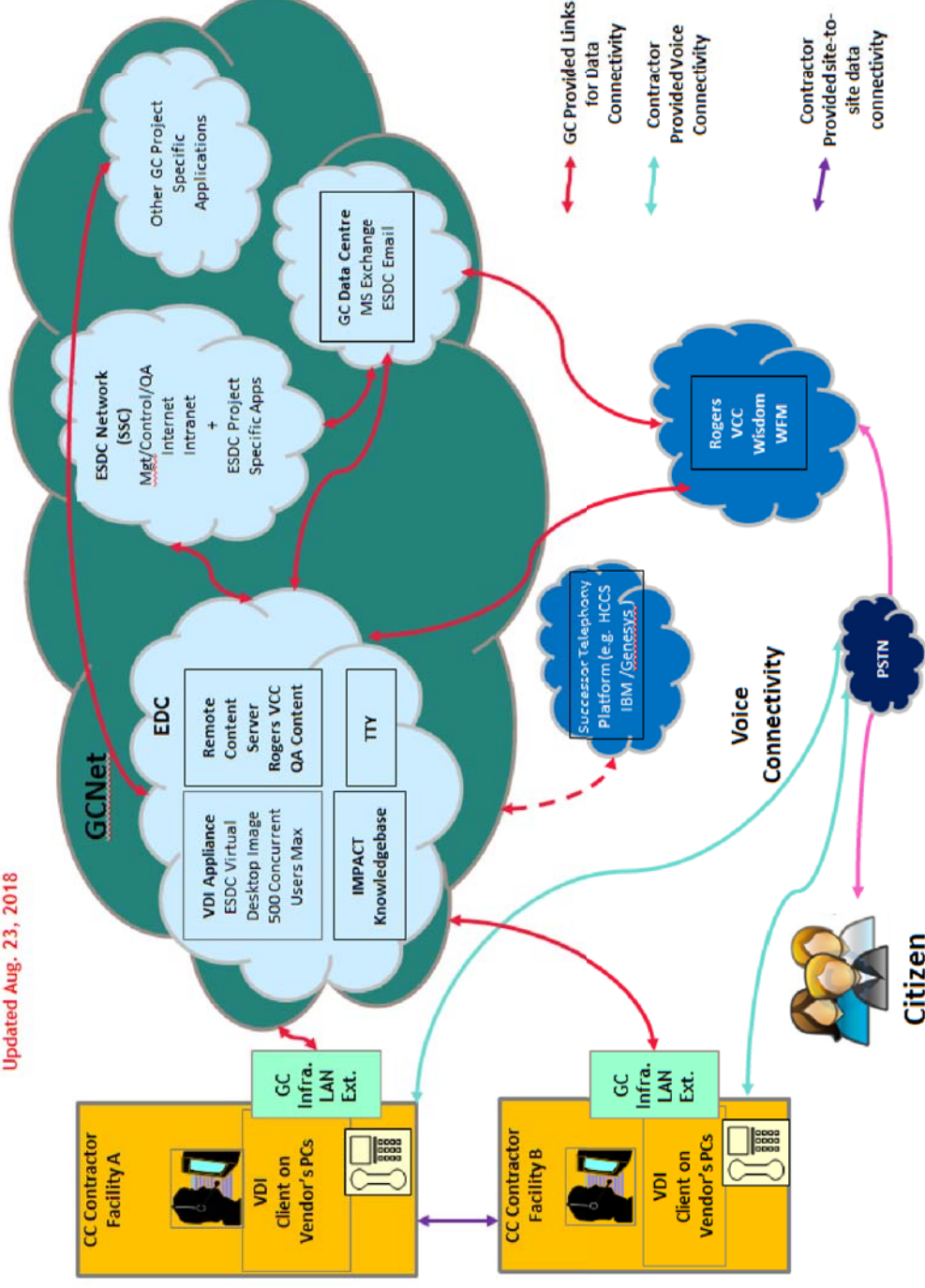
# Longer-Term Objectives

- to implement new contact centre “modalities” (e.g. mobile text) as they emerge as Canadian’s preferred ways of “contacting” and communicating with government;
- to improve delivery of services to Canadians – e.g. leverage emerging tools and technologies such as newer analytics tools to improve effectiveness of messaging and delivery of services;
- using client-centric measures (e.g. client engagement and first-call-resolution) to determine quality of services rather than traditional transactional measures (e.g. call wait times);
- continue alignment between ESDC channels to ensure consistency of messaging and advance the government’s service transformation agenda; and,
- continue to support the government’s strategies to engage with other government departments and jurisdictions in partnering arrangements for delivery of services to Canadians.



# Strawman Technical Environment

Updated Aug. 23, 2018



# Strawman Infrastructure Approach

- The telephony and call processing will be provided through the current voice infrastructure and the Rogers VCC platform.
- The contact centre agents, supervisors, QA, reporting, training and management resources will be provided, housed and managed by the Contractor.
- The Contractor will provide multiple service locations to address requirements for business continuity (BC) and disaster recovery (DR) (minimum 2 facilities).
- Connections to enable DR/BC must be provided by the Contractor.
- Contractor Facilities used for service delivery under the contract must be approved to the Protected B level by CISD of Public Services and Procurement Canada (PSPC).
- The knowledgebase and agent interface (IMPACT) will continue to be provided by Canada through SSC provided hosting and network infrastructures.
- Access to the Government provided infrastructure, knowledgebase, and business systems (e.g. as required to support CIS initiatives) will be through secure VDI desktop access.
- The workforce management tools Wisdom WFO will be made available by Canada. Contractor provided WFM tools may be provided and used by the Contractor.





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# Questions?



## 3. Procurement Process

- Overview of the procurement process and schedule
- RFQ Response preparation instructions
- Basis of selection and evaluation criteria



# Procurement Authority

All inquiries pertaining to this RFQ must be directed in writing to the Canada Contact Person:

Attention: Susan Westall

Title: Supply Team Leader

Telephone: 613-949-8350

Email: [Susan.Westall@tpsgc-pwgsc.gc.ca](mailto:Susan.Westall@tpsgc-pwgsc.gc.ca)



# Rules of Engagement

- PSPC Procurement supported by the Fairness Monitor will oversee the proceedings to ensure that Bidders that are **not present will not be at a disadvantage.**
- Formal responses to questions raised will be documented in writing by Canada and distributed through [Buyandsell.gc.ca](http://Buyandsell.gc.ca).
- As stated in the RFQ Section 2.5.2:  
*“To ensure the integrity of the procurement process, enquiries and all other communications regarding the RFQ must be directed only to the Procurement Authority.”*





# Procurement Process

The Procurement Authority expects to select a Contractor following a two-stage procurement process:

## **Stage 1 - RFQ**

- Identify the four (4) highest ranked Qualified Respondents and invite them to proceed to Stage 2 (RFP) as Proponents

## **Stage 2 - RFP**

- A Request for Proposals (RFP) issued to Proponents qualified through the Stage 1 RFQ process
- The RFP will have provisions for Commercially Confidential Meetings
- May include a Proof of Concept component to the evaluation
- Will result in the selection of a Bidder that will be recommended for contract award; and

## **Award of contract**





# Procurement Schedule (anticipated)

Key Activities	Timeline
<b>STAGE 1 – REQUEST FOR QUALIFICATION</b>	
RFQ posting	October 5, 1029
Information Session	October 17, 1029
End of Solicitation Enquiry Period	October 23, 2018
Response Submission Deadline	November 16, 2018
Response Evaluation Completion	December 14, 2018
<b>STAGE 2 – REQUEST FOR PROPOSALS</b>	
RFP release to Qualified Proponents	January 2019
Commercially Confidential Meetings	January 2019
Proposal Submission Deadlines	February 2019
Vendor proof of concept	March 2019
Announcement of successful Bidder	April 2019
Award of Contract	May 2019



# RFQ Structure

- Main Body of RFQ
- Appendix A – Definitions and Interpretation
- Appendix B – Forms and Certifications
- Appendix C – Evaluation Criteria and Submission Requirements
- Appendix D – Applicable Scales for Rated Evaluation Criteria
- Appendix E – Respondent Instructions
- Appendix F – Enquiry Form
- Appendix G – Submission Agreement for RFP
- Appendix H – RFQ Security Guide
- Appendix I – Administrative Checklist
- Appendix J – Statement of Requirements (**available upon request**)
  - Appendix J.1 – Historical Contact Centre Call Volumetrics and Staffing
  - Appendix J.2 Security Requirements Check-list (SRCCL)



# RFQ Response Preparation Instructions

- Addressed in Section 3 of RFQ – Response Preparation Instructions and Appendix E – Respondent Instructions
- Respondents must be mindful of the RFQ instructions
- Variations from the requirements of the RFQ may render the response non-compliant



# Date and Place of Delivery of Responses

**Response submission deadline: November 16, 2018 at 14:00 EST**

## **Hard Copy Delivery Address:**

Bid Receiving - PWGSC  
11 Laurier St., Phase III, Place du Portage Core 0B2  
Gatineau, Québec K1A 0S5  
Canada

## **Epost Email Address:**

[TPSGC.DGAreceptiondessoumissions-ABBidReceiving.PWGSC@tpsgc-pwgsc.gc.ca](mailto:TPSGC.DGAreceptiondessoumissions-ABBidReceiving.PWGSC@tpsgc-pwgsc.gc.ca)



# RFQ Submission Requirements

## Mandatory Content

Respondents must submit the following **mandatory** documents as part of their Response:

- Technical Proposal (see Appendix C of RFQ)
- RFQ Bid Submission Forms and Certifications (see Appendix B of RFQ)



# Security Requirements

## Stage 1 – RFQ

Security requirements at the RFQ stage are identified in Appendix J.2 Security Requirements Checklist

- **Prior to RFQ closing:** the Respondent **must** hold a valid Designated Organization Screening (DOS) issued by the Canadian Industrial Security Directorate (CISD) **or** have been sponsored for DOS.
- Refer to Mandatory Criteria M4 in RFQ

## Stage 2 – RFP

- **Prior to RFP closing:** Approved Document Safeguarding at the PROTECTED B level issued by the CISD **for two** of the Bidder's facilities.

*Respondents are encouraged to seek security sponsorship as soon as possible by contacting the Canada Contact Person:*

**Susan.Westall@pwgsc-tpsgc.gc.ca**



# Basis of Selection

- To be considered a Qualified Respondent, the Response must:
  - comply with all the requirements of the RFQ;
  - meet all mandatory criteria; and
  - obtain the required minimum number of points for the criteria that are subject to a minimum score.
- The four highest ranked Qualified Respondents will be invited to proceed to the RFP stage.
- If there are less than 4 Qualified Respondents, all Qualified Respondents will be selected for participation in the Stage 2 RFP process. Should there be an insufficient number of Qualified Respondents after Stage 1 to permit a competition in Stage 2, Canada reserves the right to cancel Stage 2 or to modify the Stage 1 requirements and re-publish the solicitation using the same or a different approach.



# Basis of Selection - Mandatory Criteria

- Mandatory Criteria will be evaluated on a pass/fail basis (i.e. responsive / non-responsive) and subject to the Phased Response Compliance Process described in Appendix C Section 4
- Mandatory Criteria (detailed criteria identified in RFQ) are:
  - **M1. Respondent Profile – Core Contact Centre Services Organization**
  - **M2. Respondent Profile – Previous Project Experience**
  - **M3. Respondent Profile – Core Infrastructure Resources**
  - **M4. Respondent Profile – Security**
  - **M5. Respondent Profile – Financial Viability**
  - **M6. Respondent Profile – Facility Location**





# Basis of Selection – Criterion Weights

#	Rated Evaluation Criteria	Section Weight	Criterion Weight	Minimum Pass Mark
<b>R-1</b>	<b>Corporate Capability</b>	<b>55%</b>		<b>60%</b>
<b>R-1.1</b>	Understanding of 1 800 O-Canada CC Project Requirements		1.65%	
<b>R-1.2</b>	Respondent Business Maturity – Years		4.40%	
<b>R-1.3</b>	Respondent Business Maturity – Sector		6.60%	
<b>R-1.4</b>	Respondent Business Facilities in Canada		5.50%	
<b>R-1.5</b>	Respondent Capability – Range of Supported CC Services		3.85%	
<b>R-1.6</b>	Respondent Capability – Resources		13.75%	
<b>R-1.7</b>	Respondent Capability – Training		6.60%	
<b>R-1.8</b>	Respondent Capability – Staff Retention		8.25%	
<b>R-1.9</b>	Respondent Capability – Innovations and investment		4.40%	



# Basis of Selection – Criterion Weights

R-2	Respondent Implementation Project References	25%		60%
R-2.1	Respondent Implementation Project References – Reference #1			5.00%
	Respondent Implementation Project References – Reference #2			5.00%
	Respondent Implementation Project References – Reference #3			5.00%
R-2.2	Respondent Onboarding and Staffing Reference Project #1			3.33%
	Respondent Onboarding and Staffing Reference Project #2			3.33%
	Respondent Onboarding and Staffing Reference Project #3			3.33%



# Basis of Selection – Criterion Weights

R-3	Processes and Methodologies	10%		60%
R-3.1	Respondent Capability – Process and Methodology			
R-3.2	Respondent Capability – Process and Methodology			
			6.00%	
			4.00%	



# Basis of Selection – Criterion Weights

R-4	Security and Privacy	10%		60%
R-4.1	Project Security – Security Policy		1.50%	
R-4.2	Project Security – Privacy Policy		3.50%	
R-4.3	Project Security – Disaster Recovery / Business Continuity		2.50%	
	Project Security – Security Policy		2.50%	



# Basis of Selection – Scoring Example

Response is awarded a 0-5 score based on how well it aligns with these scoring scales.

R-1.6	<p><b>Respondent Capability – CC Resourcing and Management</b></p> <p>The Respondent should demonstrate that it has sufficient experience in recruiting, employing, and managing resources for CC initiatives as required for the ESDC CC initiative by identifying the number of Employees in Canada currently employed by the Respondent's Contact Centre Services organization excluding any contractors</p>	<p>Points will be awarded in the following manner:</p> <p>5 pts = 500 or more Employees  4 pts = 400 up to and including 499 Employees  3 pts = 300 up to and including 399 Employees  0 pts = response does not address requirement, no response</p>
Response:	<p>Respondent provides response here.</p>	<p>Example: A response that indicates that the Respondent has 425 employees in Canada will be awarded a score of 4.  A response that does not provide the number of employees in Canada will be awarded a score of zero.</p>

Evaluated score for R-1.6 is calculated as the 0-5 score times the weight for R-1.6 set out in the scoring weight table.

**E.g. for a score of 4 out of 5, the evaluated score is 4/5 times 13.75 = 11.**



# Evaluation Process - Principles

## **Independent and Unbiased**

- Members of the evaluation committee will have no interaction with respondents.
- Conflict of interest declarations will be produced by each evaluator and by each respondent.

## **Conducted by experts and overseen by professionals**

- Only reputable subject matter experts will be part of the evaluation team.
- Evaluation criteria will be clearly articulated and documented in the form of an evaluation guide. Training for evaluators will be mandatory.
- Each team consensus meeting will be facilitated by a government contracting expert and overseen by the Fairness Monitor.



## 4. Frequently Asked Questions

Questions	Answers
1. If I did not attend this information session, can I still submit a response?	Yes
2. Will the list of attendees be published?	No
3. Will the questions and answers be published?	Yes. To ensure an open, fair and transparent process, all questions and answers will be published on <a href="http://buyandsell.gc.ca">buyandsell.gc.ca</a> .
4. Will a copy of the presentation be made available?	Yes. A copy of the presentation will be posted on <a href="http://buyandsell.gc.ca">buyandsell.gc.ca</a> in both official languages.



# Frequently Asked Questions

Questions	Answers
5. Will extensions to the closing date be considered?	The closing date has been extended to November 16, 2018 at 14:00 EST.
6. a) What is the budget? b) What is the value of the current contract?	a) The GC does not publish project budget numbers. b) The value of the current contract is available on <a href="http://buyandsell.gc.ca">buyandsell.gc.ca</a>
7. a) Is there an incumbent? b) How are the current services being delivered?	a) No. This is a new operating model. b) A description of how the current services are being delivered is in section 2 of the Statement of Requirements (Appendix J). The current contract for human resources is with Quantum Management Services Ltd.
8. There is a broad set of requirements and we need to team up with other firms to meet the requirements. Can we form a team?	Yes, but see provisions for consortia responses and structures in the RFQ, including Form B-2: Joint Venture/Consortia Declaration.





# Frequently Asked Questions

Questions	Answers
9. Can we use the references of our subcontractors to meet the requirements for references in the RFQ?	As stated in BOLD in evaluation criteria that require references, the experience of subcontracted organizations <b>will/will not</b> be accepted for evaluation purposes in response to this criterion, as appropriate.
10. Can we use the same reference for more than one criterion?	Yes. As stated in the RFQ, Respondents may use the same project reference for multiple Sample Project responses (e.g. solution architecture, migration, testing, etc.).
11. Do we have to use the reference forms as provided?	Yes, where it is explicitly identified that the Bidder must fill in the reference forms.
12. Can we obtain copies of detailed project materials referenced in the RFQ?	Detailed application and reporting materials contain confidential materials to the GC. These materials will be provided to the Bidders selected to participate in the RFP stage of the solicitation.



# Frequently Asked Questions

Questions	Answers
13. Where is the pricing evaluation in the RFQ?	There is no price evaluation in the RFQ stage. Financial proposals are required in the Stage 2 - RFP stage response only.
14. What is the process for a Financial Viability Assessment?	This will be performed by PSPC using established guidelines. Refer to the RFQ section 4.3.1 – Financial Viability Assessment
15. Are Joint Ventures allowed to respond?	Yes, but see provisions for joint venture Responses and structures in the RFQ, including Form B-2: Joint Venture/Consortia Declaration.
16. What is the process for questions during the RFQ process?	The process is set out in the RFQ Section 2.5. The timeline for questions and responses is set out in the RFQ timeline in Section 2.4.



# Frequently Asked Questions

Questions	Answers
17. Can I email in my response?	The submission process is set out in the RFQ Section 3.1. Respondents may use the epost Connect service provided by Canada Post Corporation to transmit their response electronically. Respondents must refer to Appendix E for further information.
18. What do you mean by “geographically dispersed” facilities?	Facilities must be geographically separated to ensure continuity of services in the case of natural disasters or other significant localized events that disrupts services. For example, facilities should be located far enough apart so that they would not be subject to the same climactic event, be in the same fault zone or depend on the same population base (in the case of epidemic or social unrest). Multiple facilities in the same metropolitan area would not be sufficiently “geographically dispersed”. E.g. Ottawa/Gatineau or Toronto/Scarborough. Respondents must refer to Appendix J section 3.3, for the complete list of facilities requirements.



Q&As, amendments and other information regarding this RFQ will be posted as amendments on:  
[www.buyandsell.gc.ca](http://www.buyandsell.gc.ca)

The Statement of Requirements is available upon request to the Procurement Authority (see below).

Please direct any enquiries regarding the RFQ to the Procurement Authority at:

[Susan.Westall@pwgsc-tpsgc.gc.ca](mailto:Susan.Westall@pwgsc-tpsgc.gc.ca)





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# Questions?

