

# ATTACHMENT 4.1 - EVALUATION FRAMEWORK AND PROCESS

## 1. Evaluation Framework

### 1.1. Overview

- 1.1.1. This document describes how the Bidder's Technical Proposal and Financial Proposal will be evaluated. The way in which each will be evaluated is set out in detail below.
- 1.1.2. The requirement for an Information Technology Service Management (ITSM) Tool Solution (including software and services) is referenced throughout this bid evaluation framework and is defined in the Statement of Work.
- 1.1.3. Proposals will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria. All Bidders' proposals will be evaluated in accordance with the evaluation procedures and basis of selection detailed in this section. There are several phases in the evaluation process, which are described below. Even though the evaluation and selection will be conducted in phases, the fact that SSC has proceeded to a later phase does not mean that SSC has conclusively determined that the Bidder has successfully passed all the previous phases. SSC may conduct phases of the evaluation in parallel.
- 1.1.4. An evaluation team composed of representatives of SSC will evaluate the proposals. SSC may hire any independent consultant, or use any Government resources, to evaluate any bid. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.
- 1.1.5. The evaluation team will utilize a consensus-based approach to conduct a multi-phase evaluation and selection process as follows:
- Phase 1: Evaluation of Mandatory Criteria
  - Phase 2: Evaluation of Point Rated Criteria, Determination of Written Technical Proposal Score & Verification of Minimum Pass Marks
  - Phase 3: Financial Proposal Evaluation and Determination of Preliminary Proposal Scores
  - Phase 4: Software Usability Demonstration and Scoring & Verification of Minimum Pass Marks
  - Phase 5: Determination of Overall Proposal Scores and Ranking of Bidders
- 1.1.6. The evaluation criteria for this bid solicitation places significant emphasis on the Bidder's ability to meet the technical requirement of the bid solicitation. An Overall Proposal Score, out of 100 points, will be determined as specified in the table below.

<b>Evaluation Phase / Criteria</b>	<b>Maximum Score</b>
Written Technical Proposal Score	55
Financial Proposal Score	30
<b>Preliminary Proposal Score</b>	<b>85</b>
Software Usability Demonstration Score	15
<b>Overall Proposal Score</b>	<b>100</b>

## 1.2. Evaluation Process

### 1.2.1. Phase 1: Evaluation of Mandatory Criteria

In the first phase of the evaluation process, the Bidder's technical proposal will be evaluated in accordance with the mandatory evaluation criteria as detailed herein. Responses will be evaluated and given a "Pass/Fail" rating. Bidder's proposals will be required to comply with each and every mandatory requirement (technical and financial) of the RFP. No points will be awarded for compliance with the mandatory requirements.

Only compliant proposals will move to the next phase of the evaluation process.

### 1.2.2. Phase 2: Evaluation of Point Rated Criteria, Determination of Written Technical Proposal Score & Verification of Minimum Pass Marks

Following evaluation of the mandatory requirements, compliant Bidder's written response to the point-rated criteria of the RFP will be evaluated. Bidder's proposals will be evaluated and scored based exclusively on the merits of the Bidder's written response in accordance with the stated evaluation criteria.

A Written Technical Proposal Score, out of 55 points (subject to validation) will be computed for each proposal using the weights and formulas specified in section 2.2.4. Each Bidder's score will be verified against the applicable minimum pass marks specified in section 2.2.4. Only proposals that meet all minimum pass marks will be considered compliant and move to the next phase in the evaluation process.

### 1.2.3. Phase 3: Financial Proposal Evaluation and Determination of Preliminary Proposal Scores

Compliant Bidders' proposals will be subject to a Financial Proposal evaluation as detailed in Attachment 4.3. An overall Financial Proposal Score, out of 30 points, will be computed for each compliant Bidder.

A Preliminary Proposal Score (out of 85 points) will be determined for each compliant Bidder by combining the Bidder's Written Technical Proposal Score (out of 55 points) and the Bidder's Financial Proposal Score (out of 30 points). Bidders will be ranked, from highest to lowest, based on the Preliminary Proposal Scores.

### 1.2.4. Phase 4: Software Usability Demonstration and Scoring & Verification of Minimum Pass Marks

The four highest ranking Bidders that are within 15 points (out of 85) of the highest ranked Bidder will be invited to participate in a one-on-one Software Usability Demonstration session. (Note: The purpose of this approach is to contain the cost and time required for a Bidder to prepare and deliver the Software Usability Demonstration where there is no prospect of that Bidder overtaking the highest ranked Bidder's Preliminary Proposal Score).

Example:

Bidder Identification	Written Technical Proposal Score (out of 55 points)	Financial Proposal Score (out of 30 points)	Preliminary Proposal Score (out of 85 points)	Bidder Ranking	Minimum Score Required to Participate in Demos	Invited to Software Usability Demos
Bidder A	47.85	14.75	62.60	3	76.10 – 15 = 61.10 points	Yes
Bidder B	49.50	26.60	<b>76.10</b>	<b>1</b>		Yes
Bidder C	33.80	28.50	62.30	4		Yes
Bidder D	44.90	14.75	59.65	5		No
Bidder E	30.75	Non-compliant (did not meet minimum pass marks)		N/A		No
Bidder F	41.25	22.35	63.60	2		Yes

The purpose of the demonstration session is to evaluate and score the usability of the proposed ITSM Tool software in terms of the ease of configuration and user friendliness.

Qualified Bidders will be given no less than five (5) business days' notice of the Software Usability Demonstration date. The Software Usability Demonstration will be conducted at a location of the Bidder's choosing, and at the Bidder's expense, in the National Capital Region, and are expected to last no more than four hours per Bidder. The Software Usability Demonstration notification package will be issued via email and will detail the requirements and guidelines for the session. Bidders may be required to demonstrate ITSM Tool software configuration activities, utilization of an SSC-provided dataset on the proposed software, software usability, and/or other requirements. The proposed Contractor Project Manager, Solution/Application Architect and Integration Specialist resources should attend the demonstration session.

Invited Bidders must accommodate the date requested by SSC as there is no flexibility in the schedule.

The Software Usability Demonstration requirements will be evaluated and scored in accordance with evaluation criteria pre-defined prior to closing of the RFP. The SSC Evaluation Team will have an opportunity to seek further clarification and elaboration with respect to any aspect of the Software Usability Demonstration. Bidders will not be permitted to ask questions of the Evaluation Team except for the purposes of clarifying the intent or meaning of questions asked by the Evaluation Team during the session.

A Software Usability Demonstration score, out of 15 points, will be determined for each Bidder. Bidders are required to achieve a Minimum Pass Mark of 50% for the Software Usability Demonstration. Only Bidders that meet the minimum pass mark will be considered compliant and move to the next phase in the evaluation process.

#### 1.2.5. Phase 5: Determination of Overall Proposal Scores and Ranking of Bidders

Following completion of the Software Usability Demonstrations, the Overall Proposal Scores, out of 100 points, will be determined for each remaining compliant Bidder by adding the Preliminary Proposal Score (out of 85 points) with the Software Usability Demonstration Score (out of 15 points).

Bidders will be ranked based on their Overall Proposal Scores, with the highest Overall Proposal Score being deemed the 1st Ranked Bidder and so on. In the event that two Bidders achieve the

same highest Overall Proposal Score, the Bidder with the highest Software Usability Demonstration Score will be deemed the 1st Ranked Bidder.

The 1st Ranked Bidder will be recommended for award of the contract, subject to Validation as set out in the RFP.

## 2. Evaluation of Technical Proposals

### 2.1. Mandatory Criteria

2.1.1. The Bidder must include in its Bid a response to each of the mandatory requirements that follows. To be declared responsive, a bid must:

- a) comply with all the requirements of the bid solicitation;
- b) meet all mandatory criteria;
- c) obtain the minimum pass mark(s) associated with the rated requirements as set out in the table below.

2.1.2. Bids not meeting (a), (b) and (c) will be declared non-responsive.

<b>Mandatory Technical Evaluation Criteria</b>
<b>M-1 Core Team</b>
<b>M-2 Corporate Experience, ITSM Tool Software Configuration and Implementation</b>
<b>M-3 Corporate References, ITSM Tool Software</b>
<b>M-4 Infrastructure Capacity Specifications</b>
<b>M-5 Detailed Work Plan for Contractor Onboarding</b>
<b>M-6 Detailed Work Plan for Development of Transition Out Plan</b>
<b>M-7 Contractor Governance Structure</b>
<b>M-8 Contractor Project Management Team</b>
<b>M-9 Proposed Core Resources</b>
<b>M-10 Proposed ITSM Tool Software</b>

## 2.2. Rated Criteria

2.2.1. Each point rated technical criterion should be addressed separately. The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient.

2.2.2. Points will be awarded based on the Point Allocation specified for each rated requirement that follows; there are no partial points.

2.2.3. The Rated Technical Evaluation Score will be calculated as follows:

- a) The Rated Criteria scores will each be weighted according to the table below.
- b) The Weighted Scores will be added together to form the Total Score.
- c) The Total Score will be weighted to form the Written Technical Proposal Score.
- d) The minimum weighted scores have been rounded. Bidder's actual scores will be calculated and rounded to two decimal places.

2.2.4. Bids that fail to obtain the required minimum pass mark specified will be declared non-compliant.

Point-rated Technical Evaluation Criteria	Maximum Points	Minimum Pass Mark	Weight Score
<b>R-1 Corporate Reference Contracts, ITSM Tool Software Configuration and Implementation</b>	200		
<b>R-2 Corporate Reference Projects, ITSM Tool Software</b>	150		
<b>R-3 ITSM Tool Software Implementation Partners</b>	50		
<b>R-4 Customer Care Program</b>	100		
<b>Sub-total (R-1 to R-4)</b>	<b>500</b>	<b>250 (50%)</b>	[Bidders Score (out of 500) / 500] x 20 points
<b>R-5 Proposed SDLC</b>	100		
<b>R-6 Detailed Work Plan for Contractor Onboarding</b>	100		
<b>R-7 Detailed Work Plan for Development of Transition Plan</b>	100		
<b>R-8 Proposed Resources:</b>			
R-8.1 Contractor PM	100		
R-8.2 Solution / Application Architect	100		
R-8.3 Integration Specialist	100		
<b>Sub-total (R-5 to R-8.3)</b>	<b>600</b>	<b>360 (60%)</b>	[Bidders Score (out of 600) / 600] x 20 points

Point-rated Technical Evaluation Criteria	Maximum Points	Minimum Pass Mark	Weight Score
R-9 Ease of Configuration of Proposed ITSM Tool	600	360 (60%)	[Bidders Score (out of 600) / 600] x 15 points
<b>Written Technical Proposal Score</b> (Sum of weighed scores)	<b>Maximum 55 points</b>		