



SHARED SERVICES CANADA

Amendment No. 006 to the Request for Proposal for Information Technology Service Management (ITSM) Tool Solution

| | | | |
|------------------|-------|--------------------|----------------|
| Solicitation No. | 30190 | Date | March 6, 2019 |
| GCDocs File No. | | GETS Reference No. | PW-19-00841613 |

This Amendment is issued to publish documents and answer questions 108, 131,132, 156, 181,183, 187, 235-236, 238, 242-243, 246 & 251. Except as expressly amended by this document, the RFP remains unchanged.

Note: The second question period closes at 11:59 pm on March 12, 2019.

THIS RFP AMENDMENT IS ISSUED TO:

1. Publish Canada's Responses questions 108, 131,132,156,181,183 187, 235-236, 238, 242-243, 246 & 251
2. Modifications
3. Delete and replace Attachment 4.2: Technical Evaluation
4. Delete and replace Annex A – Statement of Work
5. Delete and replace ITSM RFP

1. PUBLISH CANADA'S RESPONSES TO QUESTIONS

QUESTION 108:

2.3 R-2.2 – Can you define “Canadian English” and why is it important to differentiate from UK and US English?

ANSWER 108:

The reference to Canadian English has been removed. See Modification 15 below.

QUESTION 131

As SSC appears to be looking for a potential long-term partnership, would the stability and financial viability of the software provider be important to the government?

ANSWER 131

Refer to Attachment 4.2 – Technical Evaluation. Including M-3 Corporate References, ITSM Tool Software and R-2 Customer Reference Projects, ITSM Tool Software. See also answer 132.

QUESTION 132

Please explain why SSC has not included requirements to share financial and other publicly-available and auditable information to determine vendor viability.

ANSWER 132

See SSC Standard Instructions for Procurement Documents No. 1.4, section 1.21 Rejection for Failure to Pass Financial Capability Assessment (file name: ssc_standard_instructions_1.4_en.pdf)

QUESTION 156

itsm_rfp_en, 4.3 c), Financial evaluation, for how long will resource hourly rates needs to be effective?

ANSWER 156

As set out in in Attachment 4.3, Appendix 1 – Financial Evaluation Pricing Tables (see RFP Amendment No. 002), the proposed Per Diem apply to the initial three-year period of the contract. Beginning in year 4

(and each option year thereafter), the Per Diem Rates, are subject to an economic price adjustment (EPA). See RFP Modification 19 contained in RFP Amendment No.006.

QUESTION 181:

Will SSC provide translation services for orientation materials?

ANSWER 181:

No. As stated in Annex A, SOW, section 10. Training Services Requirements, training materials must be provided in both English and French. See also Modification 16 below.

QUESTION 183

If a proponent is a joint venture and the lead of the joint venture holds the required FSC, do all members of the JV have to also hold the required FSC?

ANSWER 183

Yes.

QUESTION 187:

With respect to Attachment 4.3, Appendix 1 – Financial Proposal Pricing Tables, Table #1 - Per Diem Rates, we request that SSC define the experience level that they are looking for in the Per Diem Rate Table. More specifically is SSC looking for Junior (less than five years), Intermediate (Five to ten years) or Senior (Over ten years) resources. This is important in order that all vendors can provide an equivalent skill set rate.”

ANSWER 187:

As stipulated in Annex A, SOW, section 2.2 a) “The Contractor is responsible for overseeing the quality of Work delivered by its resources as well as managing its resources to ensure the Work is completed within the budget and schedule set out in the Contract”, including subsequent TAs. SSC anticipates that the majority of the TAs will be delivered on a firm fixed price basis. Although SSC would anticipate that many of the resources will be at the senior or intermediate levels it is the responsibility of the Contractor to determine its resourcing requirements. For TAs which are delivered on a Per Diem basis, SSC would expect senior resources to support the majority if these requirements. Bidders should propose a Per Diem Rate that reflects its anticipated resourcing strategy.

See also Modification 17 below.

QUESTION 235

For the references that are required can SSC provide details on how the references will be conducted i.e. Will references be contacted via email?

ANSWER 235

See RFP Modification 20 contained in RFP Amendment No.006.

QUESTION 236

For the references that are required can SSC provide details on how the references will be conducted i.e. Will references be contacted via telephone?

ANSWER 236

See RFP Modification 20 contained in RFP Amendment No.006.

QUESTION 238

Can information be provided anonymously or with a high level project description?

ANSWER 238

See RFP Modification 20 contained in RFP Amendment No.006.

QUESTION 242

In the precursor RFI to this RFP (Request for Information No. R2478), Question #15, states:

“SSC intends to permit each Bidder (including related entities) to submit only one bid in response to the upcoming RFP. In addition, SSC is also considering limiting each interested legal entity (which includes the parent, subsidiaries or other affiliates of that legal entity) to participate in only one bid (either as the Bidder or as a sub-contractor to the Bidder for a proposed Bidding Team) regardless of whether they are a System Integrator or an Enterprise ITSM Tool Software Publisher.”

The above condition allows the market to make optimal partnering decisions between Prime Respondents and ITSM Tool Software Publishers so that only the best possible bids are submitted for consideration, rather than multiple bids proposing the same ITSM Tool with little or no variation.

As per the RFI, can Canada confirm that both, System Integrators and ITSM Tool Software Publishers, are limited to participating in one bid only?

ANSWER 242

The Bidder (as defined in the RFP) may submit only one bid, this does not apply to sub-contractors. Refer to RFP Part 2 Instructions for Bidders, section 2.4 Submission of Only One Bid.

QUESTION 243

It is our understanding that Canada has involved multiple contractors (firms as well as independent contractors) specifically PWC in the SSC ITSM Process Transformation initiative that is currently underway (Buy and Sell RFP# 10052799). Can Canada confirm that these contractors, both firms and independent contractors, are prohibited from responding to this RFP, either as prime respondents or sub-contractors? Allowing these contractors to participate in bids would constitute an unfair advantage.

ANSWER 243

Refer to SSC Standard Instructions 1.22. Rejection of a Bid due to Conflict of Interest or Unfair Advantage.

QUESTION 246:

As many ITSM Toolset Implementation projects can last a number of years and resources assigned to those projects are often on them for long durations, would the Crown consider for M.9.3.2 allowing one of the projects referenced for a minimum duration of six months within the ten years preceding the issuance date of this RFP?

ANSWER 246:

Please note that the required experience can be demonstrated by one or more projects where the resource developed and implemented an interface mechanism between the proposed ITSM Tool software and each of the systems listed. The requirement has been changed. See modification 18 below.

QUESTION 251

As per M1 - Must all subcontractor organizations that form part of the core team hold a secret FSC?

ANSWER 251

The Bidder must comply with the security requirements stipulated in Annex C, SRCL. The Bidder should consult with its Corporate Company Security Officer / Company Security Officer (CCSO/CSO) to ensure it is in compliance with the SRCL.

2. MODIFICATIONS

15) Reference: Attachment 4.2 – Technical Evaluation, criteria # R-2 Customer Reference Projects, ITSM Tool Software

DELETE:

| | | | |
|---------------|---|-----------|--|
| R-2.4 | A bilingual implementation was deployed under the Customer Reference Project. | 10 | <ul style="list-style-type: none"> • 10 points – Bilingual implementation (Canadian French and Canadian English); or • 5 points – Bilingual implementation (any 2 languages) |
| R-2.8 | A bilingual implementation was deployed under the Customer Reference Project. | 10 | <ul style="list-style-type: none"> • 10 points – Bilingual implementation (Canadian French and Canadian English); or • 5 points – Bilingual implementation (any 2 languages) |
| R-2.12 | A bilingual implementation was deployed under the Customer Reference Project. | 10 | <ul style="list-style-type: none"> • 10 points – Bilingual implementation (Canadian French and Canadian English); or • 5 points – Bilingual implementation (any 2 languages) |

INSERT:

| | | | |
|---------------|---|-----------|---|
| R-2.4 | A bilingual implementation was deployed under the Customer Reference Project. | 10 | <ul style="list-style-type: none"> • 10 points – Bilingual implementation (Canadian French and English); or • 5 points – Bilingual implementation (any 2 languages) |
| R-2.8 | A bilingual implementation was deployed under the Customer Reference Project. | 10 | <ul style="list-style-type: none"> • 10 points – Bilingual implementation (Canadian French and English); or • 5 points – Bilingual implementation (any 2 languages) |
| R-2.12 | A bilingual implementation was deployed under the Customer Reference Project. | 10 | <ul style="list-style-type: none"> • 10 points – Bilingual implementation (Canadian French and English); or • 5 points – Bilingual implementation (any 2 languages) |

16) Reference: Annex A, SOW, section 10.6 Required Training Materials

DELETE:

- a) The Contractor must provide the SSC Project Manager with all training materials, in English and French, for review and acceptance no less than twenty business days prior to the start of any training course. SSC will provide its approval or any comments for change within ten business days. The Contractor must address those comments before using the materials for training. Final versions of all training material in English and French must be completed and shared with SSC no less than five business days prior to the start of any training course.

INSERT:

- a) The Contractor must provide the SSC Project Manager with all training materials, in English or French, for review and acceptance no less than twenty business days prior to the start of any training course. SSC will provide its approval or any comments for change within ten business days. The Contractor must address those comments before using the materials for training and translate as required. Final versions of all training material in English and French must be completed and shared with SSC no less than five business days prior to the start of any training course.

17) Reference: Annex A, SOW, section 2.12 Professional Services Resources

INSERT:

NOTE: SSC reserves the right to request that the Contractor demonstrate the qualification (i.e. knowledge and experience) of any resource proposed in response to a Task Authorization. Senior resources must have > 10 years of experience associated with the role; Intermediate resources must have 5-10 years of experience, and Junior resources < 5 years.

18) Reference: Attachment 4.2 – Technical Evaluation, M-9.3 Proposed Integration Specialist, criteria # M-9.3.2

DELETE:

- ii. The proposed Integration Specialist resource must have provided the integration services to the Customer Reference Project for a minimum duration of six months within the five years preceding the issuance date of this RFP.

INSERT:

- ii. The proposed Integration Specialist resource must have provided the integration services to the Customer Reference Project for a minimum duration of six months within the seven years preceding the issuance date of this RFP.

19) Reference: RFP Part 5, Resulting Contract Clauses, section 5.13 Payment

INSERT:

5.13.16 Economic Price Adjustment (EPA)

5.13.16.1 The Provisions of this article apply to the following Firm Pricing items contained in Attachment 4.3, Appendix 1 – Financial Proposal Pricing Tables:

- a) Table #1 – Per Diem Rates
- b) Table #2 – Firm Fixed Price Work / Deliverables
 - a. Item #1: Contractor Project Management Team (fixed monthly fee for initial 24 months)
 - b. Item #10: ITSM Tool Orientation Session (price per session, including training materials)
 - c. Item #11: Transition Plan (fixed price for deliverable)
 - d. Item #12: Application Management Support (AMS) Services (fixed monthly fee for initial 12 months, with option to extend)

5.13.16.2 Beginning in Option Period 1 (i.e. Year 4), the Firm Pricing items (listed above), will be escalated for the next twelve (12) month period in accordance with the Economic Price Adjustment (EPA) provisions of this article. The Contract Basis of payment will be amended to reflect the new Pricing. The same methodology will apply to all subsequent Option Periods that the contract is in place,

5.13.16.3 The Option Period 1 Firm Pricing items (listed above) which are subject to EPA, and the Pricing for all subsequent Option Periods, will be calculated (using the Firm Pricing from the previous period) and the percentage increase (or decrease) in the Consumer Price Index (CPI), annual average, not seasonally adjusted, as published in Statistics Canada Table: 18-10-0005-01 (formerly CANSIM 326-0021), in accordance with the following formula rounded to the nearest two decimals:

$$\text{EPA} = (A / B - 1) \times 100$$

Where:

- A = Average of the monthly CPI for Canada, for the 12 months ending three (3) months preceding the start date of the new year.
- B = Average of the monthly CPI for Canada, for the 12 months ending fifteen (15) months preceding the start date of the new year.

Note: Any EPA which is less than zero, will be deemed to be equal to zero.

Example:

Per diem Rate (initial Contract Period) = \$650 x EPA (1.78%) = \$650 + \$11.57 =

Per diem Rate (Option Period1) = \$661.57

5.13.16.4 The Contractor must notify the Contracting Authority in writing of the applicable EPA, no later than thirty (30) calendar days prior to the commencement of the new year. The Contracting Authority will in turn verify the information and amend the Contract accordingly to reflect the revised Firm Pricing items.

5.13.16.5 Until such time as the adjustments to the Firm Pricing items (listed above) are made through a contract amendment, the Firm Pricing for the previous period will be used. The same process will apply for each twelve-month period and any option year exercised. Once the new Firm Pricing items have been incorporated into the Contract, the Contractor may submit a claim for any underpayment that may have occurred as a result of any delays on the part of SSC in completing the annual adjustment.

20) Reference: ATTACHMENT 4.1, Evaluation Framework and Process

DELETE:

At section 1.1.5:

- Phase 4: Software Usability Demonstration and Scoring & Verification of Minimum Pass Marks

INSERT:

At section 1.1.5:

- Phase 4: Software Usability Demonstration and Scoring, **Reference Checking & Verification of Minimum Pass Marks**

DELETE:

Section 1.2.4 Software Usability Demonstration and Scoring & Verification of Minimum Pass Marks - ***In its entirety***

INSERT:

1.2.4 Phase 4: Software Usability Demonstration and Scoring, Reference Checking & Verification of Minimum Pass Marks

1.2.4.1 Part A: Software Demonstrations

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 | 76.10 | 1 | | 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.

1.2.4.2 Part B: Reference Checking

Reference Checking of the four highest ranking Bidders (identified in Part A) will be conducted simultaneously with the Software Usability Demonstration process.

This RFP requires Bidders to provide a series of Customer Reference Contracts / Projects related to the Bidder's corporate experience as well as the experience of proposed key resources. The

purpose of Reference Checking is to validate the experience and qualifications of the Bidder, and/or its proposed resources, by confirming the information provided in response to this RFP. Specifically, SSC will conduct reference checking of each contract/project provided in response to Mandatory Technical Evaluation Criteria #M-2, M-3, M-9.1, M-9.2 and M-9.3.

In the event that the Bidder has not, at time of Solicitation, provided complete client contact information for each Customer Reference Contracts / Projects (provided in response to #M-2, M-3, M-9.1, M-9.2 and M-9.3), SSC will request client contact information for the purposes of Reference Checking. Upon request by SSC via email, the Bidder will have a minimum of 48 hours to provide the required information. If the information is not provided within the period specified in the request, SSC will declare the bid non-responsive.

Reference Checking will be conducted via email with the form of question to be used to request confirmation from the identified Client Contact as follows:

Sample Question to a Customer Reference Contract (Provided in response to M-2) :

Has the <<Core Team Member identified in the bid>> provided your organization, within five years preceding January 24, 2019, professional services to configure and implement the proposed ITSM Tool COTS software? And if so:

- a) Did the <<Core Team Member identified in the bid>> bill a minimum of \$5M (Canadian, including taxes) in professional services as of January 24, 2019?
- b) Did the work delivered by <<Core Team Member identified in the bid>> include completion, as of January 24, 2019, 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).

Yes the Bidder has provided my organization the services described above.

No the Bidder has not provided my organization the services described above.

I am unwilling or unable to provide any information about the services described above.

Wherever information provided by a reference differs from the information supplied by the Bidder, the information supplied by the reference will be the information evaluated. The proposal may be deemed non-responsive based on the information provided by the reference.

1.2.4.3 Part C: Verification of Minimum Pass Marks

Any Bidder which fails to meet the Minimum Pass Mark of 50% for the Software Usability Demonstration is evaluated as non-responsive and ineligible for further consideration.

Any Bidder which is re-evaluated as a result of the information provided through the Reference Checking process (if applicable) and evaluated as non-responsive will be ineligible for further consideration.

3. DELETE AND REPLACE ATTACHMENT 4.2: TECHNICAL EVALUATION

All documents have been attached separately.

4. DELETE AND REPLACE ANNEX A – STATEMENT OF WORK

All documents have been attached separately.

5. DELETE AND REPLACE ITSM RFP

All documents have been attached separately.