



**REQUEST FOR INFORMATION**  
**FOR**  
**WORKSPACE BOOKING TOOL**

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**Solicitation File Number:** RFX000152

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# 1 General Information

## 1.1 Introduction

- a) Phase 1 of Procurement Process: This Request for Information (RFI) is part of the first phase of procurement process by Canada Mortgage and Housing Corporation (CMHC) for a **WORKSPACE BOOKING TOOL** (the “Solution”) as part of CMHC’s Workplace Transformation project at 700 Montreal Road in Ottawa.

CMHC is seeking submittal from experienced, responsible and qualified suppliers who have a proven history of operating and delivering such services and solutions to public and private sector organizations/companies.

Suppliers are invited to submit responses to assist CMHC in refining its requirements for the Solution. 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 Solution.

- 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. CMHC reserves the right to cancel any of the preliminary requirements described as part of the Solution 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 CMHC, it may not result in any subsequent procurement processes.
- c) Responses Costs: CMHC 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. Responses to this RFI will not be returned to Respondents.
- d) Responses: Responses will not be formally evaluated. However, the responses received may be used by CMHC to develop or modify the procurement approach. CMHC will review all responses received by the RFI closing date. CMHC may, at its discretion, review responses received after the RFI closing date.
- e) Ownership of Responses: All responses and related materials become the property of CMHC and will not be returned. CMHC will not reimburse the Respondent for any work related to, or materials supplied in, the preparation of the RFI response.

## 1.2 CMHC Background

CMHC is the Government of Canada’s National Housing Agency with a mandate to help Canadians gain access to a wide choice of quality affordable homes. It is a Crown corporation with a Board of Directors reporting to Parliament through the Minister of Families, Children and Social Development the Honourable Ahmed Hussen.

CMHC has approximately 2,000 employees located at the Ottawa office and throughout the regional offices across Canada; Atlantic, Quebec, Ontario, British Columbia, Prairies and Territories.

## 1.3 Overview of the Project

### a) Current Environment:

The current booking of spaces is done through Outlook (O365 English and French). Booking rules have been setup in order to fit the employees’ needs.

Current booking rules by room type:

| Room Type                          | Booking Time (max) | Book up to          |
|------------------------------------|--------------------|---------------------|
| Focus Room                         | 2 hours            | 7 days in advance   |
| Meeting Room                       | 24 hours           | 90 days in advance  |
| Workstation                        | 24 hours           | 7 days in advance   |
| Language Room                      | 5 days             | 120 days in advance |
| Collaboration Space (Project Room) | 24 hours           | 90 days in advance  |
| Multi-purpose Room                 | 24 hours           | 180 days in advance |

### b) Goals and Objectives

The project goal is to enhance the space booking experience for CMHC users.

The project involves multiple requirements to fulfill the needs of the users. The Solution will be used across Canada in all CMHC offices to support the efficient booking and usage of space (approximately 1,000 to 1,500 bookable spaces). Wayfinding tools, such as touch screen kiosks, including real-time access to floor plans offering booked space views, navigational information and common service information will be used to enhance efficiency and user experience.

The proposed Solution will be innovative, user-friendly, fully bilingual (in both official languages – which will be vetted by CMHC’s Linguistic Services team) and compliant with accommodation standards in order to meet CMHC and regulatory requirements.

Please see Section 5 – Statement of Requirement.

|                          |               |
|--------------------------|---------------|
| Existing bookable spaces | 800 (approx.) |
|--------------------------|---------------|

|                         |                       |
|-------------------------|-----------------------|
| Future bookable spaces  | 1,000-1,500 (approx.) |
| Number of users at CMHC | 3,300 (approx.)       |

**c) Scope of Anticipated Procurement:**

CMHC is currently contemplating the award of one contract for up to five years resulting from any subsequent solicitation.

**d) Intended Schedule:**

The goal of this RFI is to have proponents provide the requested information to CMHC by April 15, 2020.

**1.4 Submitting Questions**

- a) Questions about this RFI can be submitted to the Procurement Advisor at his or her email address identified on the cover page up until 10 working days before the closing date and time indicated on the cover page of this document. CMHC may not answer questions received after that time.
- b) To ensure the consistency and quality of information provided to suppliers, significant questions received and the answers will be posted on the Government Electronic Tendering Service, Buy & Sell, as an amendment to this RFI.

**2 Information Requested by CMHC Comments on Preliminary Documents**

All documents reflecting CMHC’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.

Suppliers are requested to provide their comments, concerns and, where applicable, alternative suggestions regarding how the requirements or objectives described for the Solution 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**

CMHC requests responses to the questions in Section 5 – Statement of Requirement.

**2.3 Respondents should not include firm pricing, unit costs or quotations in their submission; however, CMHC is looking for an idea of what the market fee structure might be for this type of solution. Price estimates for budgetary purposes may be submitted.**

## **3 Supplier Responses**

### **3.1 Submitting a Response**

Time and Place for Submission of Responses: Suppliers interested in providing a response should submit their response to CMHC's electronic receiving address at [ebid@cmhc-schl.gc.ca](mailto:ebid@cmhc-schl.gc.ca) as well as to the Procurement Advisor at the email address identified on the cover page by the closing date and time identified on the cover page of this document.

The subject line of the transmission must state RFI number. An automatic confirmation of receipt will be sent to all respondents. Responses may be submitted in MS Word or Adobe Acrobat PDF, in English or in French.

Responsibility for Timely Delivery: Each supplier is solely responsible for ensuring its response is delivered on time to the correct email address.

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 CMHC may contact about the response, including the person's name, title, address, telephone number and email address.

### **3.2 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. CMHC will treat the responses in accordance with the Access to Information Act and any other laws that apply.

## **4 CMHC's Review of Responses**

### **4.1 Review of Responses**

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

- a) CMHC may, in its discretion, contact any suppliers to follow up with additional questions or for clarification of any aspect of a response. CMHC’s follow-up may involve a request for a further written response or for a meeting with representatives of CMHC; and/or
- b) CMHC will meet with suppliers who indicate in their responses that they wish to participate in a follow-up meeting. After the closing date, the Procurement Advisor will follow up with these suppliers to set up a meeting time. CMHC may set a limit for the number of representatives of the supplier who may attend, but a minimum of four representatives will be permitted to attend.

## 5 The Statement of Requirement

### 5.1 Describe how your solution meets the following criteria:

| Item No. | Type of Criteria | Requirement Statement  |
|----------|------------------|--|
| 1        | Functional       | The Solution must be fully bilingual (Canadian English and Canadian French) in all software and hardware user interfaces.  |
| 2        | Functional       | The Solution must be user-friendly and intuitive in all respects, including user interface and presentation of information, regardless of the type of device being used (meeting room display panel, mobile device, laptop, etc.)  |
| 3        | Functional       | The Solution must provide integration with Exchange/Outlook (O365) including:<br>-Bookings made via tool must update the user’s or booking space resource’s calendar.<br>-Cancellations made via tool must update the user’s or booking space resource’s calendar immediately.<br>-The capability for users to book meetings, check-in and invite participants directly via the Meeting room display panel.<br>-The capability for users to filter room selection based on available location, capacity, category and amenities via the Outlook interface. |
| 4        | Functional       | The Solution must have the capability to provide data analytics on how space is being used and where efficiencies can be found.  |
| 5        | Functional       | The Solution must provide booking essentials including:<br>Filtering capabilities to provide user with a list of rooms that fits their requirements:<br>-Building/Office (e.g. Ottawa, Halifax, Toronto, etc.)   |

| Item No. | Type of Criteria | Requirement Statement  |
|----------|------------------|--|
|          |                  | <ul style="list-style-type: none"> <li>-Amenities (e.g. Hub, Trio, Height-Adjustable Desk, etc.)</li> <li>-Room Category (e.g. Focus Room, Meeting Room, Multi-Purpose Room, Workstation)</li> <li>-Room Capacity</li> <li>-Capability to display pictures of the spaces in order to provide a visual preview of the room.</li> </ul>  |
| 6        | Functional       | <p>Floor plans:<br/>The user must have access to view an interactive floor plan, integrated with the e-mail system, which will display all the available and unavailable spaces; defined by user-selected filters.</p>   |
| 7        | Functional       | <p>Mobile:<br/>Users must be able to book a space using a smartphone, having access to the same feature set as the desktop experience. CMHC uses Outlook for IOS, Outlook for Android, as well as Microsoft webmail.</p>   |
| 8        | Functional       | The Solution must comply with accessibility standards (Accessible Canada Act).   |
| 9        | Functional       | <p>The Solution must be compatible with on-site technology options including:<br/>-Meeting Room Display Panels – Tablets installed at the entrances of all meeting rooms to create new, extend existing and end meetings in an instant on location. The solution must also include a check-in feature that will confirm attendance or release the booking if the user does not check in.</p> |
| 10       | Functional       | The Solution must be compatible with wayfinding kiosks that will be strategically placed in common areas that provide navigational information and common services information. The content will need to be manageable by CMHC.  |
| 11       | Functional       | The Solution must be compatible with wayfinding kiosks that will reflect the current floorplan drawings (CAD) used to manage space at CMHC, using a clean user interface layer. As CAD drawings are maintained, the solution should allow effort and cost free updates to the floor plan drawings (CAD) on the wayfinding kiosks.  |
| 12       | Functional       | The Solution must be compatible with wayfinding kiosks that will allow un-authenticated users to book workspaces ad-hoc via the interface.   |
| 13       | Functional       | The Solution must have the capability to alert if any of the panels has an issue with connectivity, hardware etc. (e.g. automated creation of incidents in CMHC’s ticketing system, ServiceNow)  |

| Item No. | Type of Criteria | Requirement Statement  |
|----------|------------------|--|
| 14       | Functional       | Access to the Solution must be available to users working remotely.  |
| 15       | Functional       | The solution must be compatible with hardware that provide plastic casements available in black.   |
| 16       | Functional       | The solution must be compatible with room booking panels capable of mount to a 2-gang electrical box and have mounting options for Drywall and Glass.  |
| 17       | Functional       | The Solution must provide reporting capabilities for the purposes of effective space planning, forecasting, usage and demand.  |
| 18       | Security         | The Solution must ensure CMHC data resides in Canada;  |
| 19       | Security         | The Solution must be in compliance with security (ITSG-33) and privacy ( <a href="http://lawslois.justice.gc.ca/eng/acts/p-21/">http://lawslois.justice.gc.ca/eng/acts/p-21/</a> ) requirements. |
| 20       | Security         | The Solution must be 802.1x compliant for NAC (Network Access Control)   |
| 21       | Technical        | The Solution must provide integration with Exchange/Outlook (O365); Outlook plugin compatible with Microsoft CRM   |
| 22       | Technical        | The Solution must be compatible with room booking panels that are IEEE 802.3at Type 2 compliant PoE+   |
| 23       | Technical        | The Solution must provide integration with Active Directory/Azure Services   |

## 5.2 CMHC Resources And Responsibilities

- a) Exchange/Outlook O365 including licensing;
- b) Network infrastructure;
- c) Cabling and power to the devices;
- d) Wayfinding digital kiosk hardware;
- e) Room booking panel hardware for the Ottawa location only.

## 5.3 Vendor Resources And Responsibilities

- a) Provide information on the commercial grade solution that would be provided;
- b) Provide information on solution maintenance, including task ownership;
- c) Provide information on solution technical support and security standards;
- d) Provide information on licensing structure;
- e) Provide reporting samples
- f) Provide product demos on CMHC premises if requested by CMHC.



## 5.4 Vendor Qualifications

- a) Provide a maximum two-page overview of your company's qualifications and experience with similar size companies or government entities within the past three years.

**Please include:**

- b) Name of Company
- c) Name of Primary Contact Person
- d) Key Executives & Personnel
- e) Phone No.
- f) Email
- g) List of companies using your services
- h) Number of years your Company has been in business
- i) Your company's annual gross sales

## 5.5 References

Please provide three client or business related references, which can be contacted by CMHC, that have purchased a solution that aligns with the stated requirements, and indicate their name and contact information (name, phone number and email address).

## 5.6 Additional Information:

Please provide detailed information about a potential Solution, including responses the following questions:

- 1) How are the general business requirements addressed by your solution?
- 2) Are there significant gaps in the identified requirements or how they could be improved?
- 3) What security model is used by your solution to ensure security, (ITSG-33) and privacy (<http://lawslois.justice.gc.ca/eng/acts/p-21/>) requirements are met?
- 4) Describe your company's proponent approach for implementing, installing and supporting this type of solution.
- 5) Describe how much time is usually required to plan, test, and mobilize this to a fully functional system.
- 6) Describe your approach for ongoing maintenance, updates, lifecycle of the solution (e.g. hardware refresh, etc.) and is there a gap to translate the updated versions of the solution?
- 7) Describe your approach to ensuring security of information.
- 8) Describe the types of hardware that can function with your solution.
- 9) Describe how your solution would automate the integration of room booking (via Exchange/Outlook), invite people, and integrate with Microsoft Surface Hubs in the meeting rooms.
- 10) Describe how your solution would enable the tracking of workspace usage (booking usage vs actual usage).

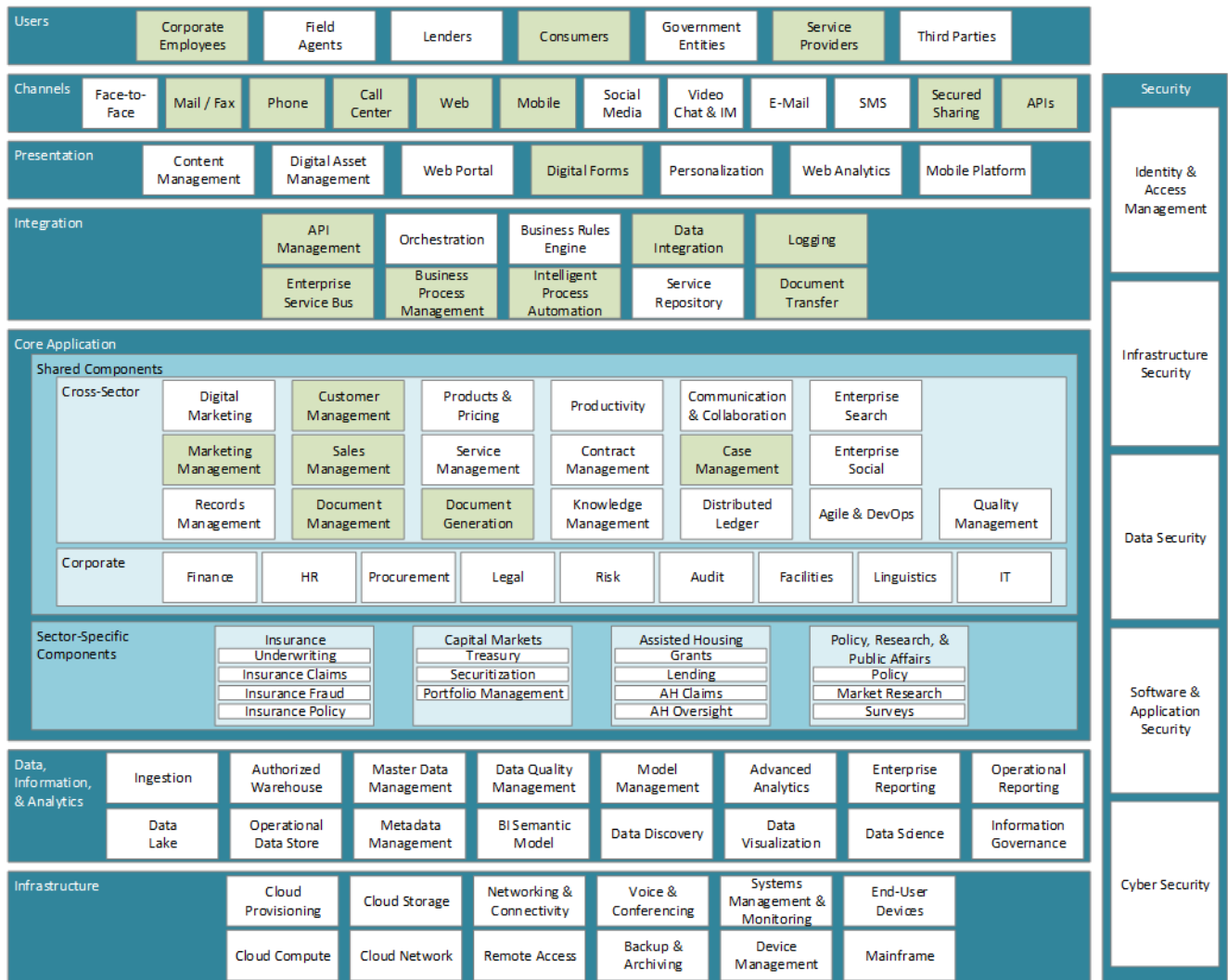
- 11) Does the solution provide role-based access control, and management?
- 12) Does the solution integrate with Active Directory (AD) identify infrastructure?
- 13) How are credentials stored?
- 14) Does an auditing capability exist?
- 15) Elaborate on the version control capability that exist within the solution to track changes?
- 16) Does your solution offer development, and testing tools when creating automation? Please elaborate.
- 17) What type of governance model should be implemented to drive automation within CMHC?
- 18) Elaborate on the skillset needed to code the automation?
- 19) What kind of repository is available to enable process reusability?
- 20) Is the solution managed centrally? Please provide details.
- 21) What kind of dashboard, and reporting is available?
- 22) Elaborate on the communication security used between the central automation solution, and the managed endpoint?
- 23) Does your solution include both English and French interfaces out of the box?
- 24) Elaborate on the protocols supported by the solution. Does the solution support Representational State Transfer, (REST) and Simple Object Access Protocol (SOAP) Application Program Interface, (API) for integration action with other systems?
- 25) Does the solution remove all stored information gathered once the automation is complete with the exception of, what was stored in the IT Service Management tool? Please elaborate.
- 26) Does the solution support being scanned by vulnerability assessment scanning tools?
- 27) Does the solution support a multi-tenancy mechanism to isolate automation by service lines (e.g. server, network, and storage) as well as client?
- 28) In the development of automation, does the solution support the decomposition of work in a modular structure to facilitate reusability?
- 29) Does the solution support a resume function when an automation fails and requires manual intervention? Please elaborate.
- 30) Does the solution support graphic user interface (GUI) for developing processes, and sequences following like Business Process Model & Notation (BPMN)? Please elaborate.
- 31) Is the solution able to deal with structured data across a large variety of heterogeneous platforms? Please elaborate. Is the solution able to handle multiple data feeds from multiple sources — for example, APIs, mainframes, text box descriptors, screen scrapping? Please elaborate.
- 32) Can the solution work at presentation layer, and also work at server level without a presentation layer? Please elaborate.
- 33) Does the solution come with a record button will build a basic script of the "happy path," or one way to do a process, which can then be edited? Are you able to include exceptions to provide alternate paths based on results (status or content)? Please elaborate.
- 34) How is the status of the virtual worker is monitored, what notification capabilities exist?

- 35) In the event of a virtual worker failure, what data capture mechanism(s) are available?(e.g. logging)?
- 36) What scheduling capabilities are available? (e.g. hold if last day of the month, run only once per day etc.)
- 37) Are there any third party product dependencies needed for your solution to operate?
- 38) Elaborate on the available library of automations available that can be used for infrastructure management?
- 39) Please provide your point of view on how you see your automation solution, not just improve the execution of existing processes, but also help CMHC enable a modern public service.
- 40) Provide your point of view on how CMHC can address the “cultural change” impact when introducing your type of solution.
- 41) Please provide a roadmap of major activities CMHC would have to undertake, to drive automation as part of the culture.
- 42) Please elaborate on how we can maintain accountability for virtual workers actions, and protect access to virtual workers credentials?
- 43) Is it possible for the virtual worker to frequently change access passwords (i.e. daily) on his/her own, to ensure only the virtual workers have the appropriate password to each managed endpoint?
- 44) How does your solution ensure a nonrepudiation audit trail of the processes and scripts, under the solutions control?
- 45) Does your solution support two-factor authentication using a device bound certificate?
- 46) Please provide details on the security vault, and where credentials are stored in your solution?
- 47) What type of session management is available for privileged accounts?
- 48) Does the solution record the session to dissuade fraudsters, and does the solution conduct forensic investigations?
- 49) What type of monitoring and fraud management, where breaks in segregation of duties is unavoidable?
- 50) What type of role-based and resource-based access controls are available in the solution, to restrict access to automation functionality?
- 51) What kind of logging is available in the solution to support audit, and security and compliance investigations?
- 52) Can this logging be sent in real-time to a centralized logging service (e.g. syslog)?

## APPENDIX “A” – CMHC’S TECHNICAL ENVIRONMENT

CMHC is currently undergoing a major Technology Transformation. The Target State Architecture definition is driven by guiding principles established by Enterprise Architecture. Enterprise Architecture prefers a platform-based approach and prioritizes cloud-based Software-as-a-Service platforms in order to simplify CMHC’s technological landscape. Third-party systems will be integrated into CMHC’s Technology landscape via Enterprise Integration Services and must adhere to CMHC’s Security Policies. Solutions enabling the Target Architecture should integrate to provide a seamless user experience to enable business capabilities.

### Logical Architecture



## **APPENDIX “B” – CMHC’S SECURITY STANDARDS**

CMHC safeguards against risks associated with IT security that could impact the confidentiality, integrity and/or availability of CMHC assets. CMHC utilizes the ISO27001:2013 standard to establish, implement, maintain and continually improve its Information Security Management System (ISMS), including requirements for assessment and treatment of information security risks. Enhanced security controls, network monitoring tools and data loss prevention techniques are used by CMHC to mitigate risks associated with IT Security.

### **Security Principles**

CMHC adheres to the following IT security principles:

- 1) CMHC safeguards and protects information assets and technology infrastructure from loss;
- 2) Assets are protected in accordance with their level of criticality and risk;
- 3) All personal and competitive commercial information is protected at all times in accordance with the Privacy Act and the Access to Information Act;
- 4) All IT activities comply with applicable laws, CMHC’s Code of Conduct and standard operating procedures/directives of IT use as per the ISO27001:2013 standard;
- 5) Through effective IT security awareness training, personnel have the knowledge to perform their functions and to safeguard against any IT security threats and;
- 6) Active monitoring and testing of CMHC IT ensures efficient operation, benchmarking performance, isolation and resolution of problems, and compliance with IT sector policies.
- 7) CMHC IT Security Division monitors the use of CMHC’s electronic network to ensure compliance with the requirements of the Treasury Board, to ensure appropriate use and that confidentiality, integrity and availability of the systems are maintained.
- 8) CMHC IT Security Division performs monitoring activities, conducts any necessary reviews or investigations of CMHC’s electronic network and reports any instances or suspected cases of non-compliance with this policy.
- 9) CMHC has established access controls with respect to information assets and technology infrastructure. This includes the employment of processes and controls such as, but not limited to, trusted platform modules, firewalls, secure portals, Virtual Private Network (VPN) connections etc. that ensure the protection of CMHC’s proprietary data against inappropriate user access.
- 10) CMHC restricts access to information assets and technology infrastructure to employees who have been identified, screened, authenticated and authorized, and must keep this access to a level that permits employees to perform their duties. Access to sensitive data (Protected A and above) is based on the least-privilege principle and must be consistent with the security designation or classification level of the applications and systems being accessed.

11) CMHC IT Security Division approves, grants and revokes access to CMHC applications, systems and the CMHC networks and regularly reviews and monitors all access (including remote access, mobile access, third party access and cloud/Software as a Service (SaaS)).