

**Request for Proposals (RFP) Template  
for  
Information Technology Outsourcing Initiatives**

**a**

Alberta Government Services  
 Alberta Corporate Service Centre  
 Supply Management Branch  
 Contracted Services Section  
 2nd Floor, 12360 - 142 Street  
 Edmonton, Alberta T5L 4X9

**REQUEST FOR PROPOSALS**  
**("RFP")**  
*(insert name of Ministry)*  
*(insert name of initiative)*

RFP Number:	Contracting Manager:
RFP Issue Date:	Telephone: (780) 427- _____
RFP Closing 14:00:59 Alberta Time:	Facsimile: (780) 422-9672

Vendors must purchase this RFP directly from MERX operated by the Bank of Montreal or the Proposal will be rejected. The Supply Management Branch ("SMB") may, at any time and without notice, waive this requirement.

Vendors are advised to pay careful attention to the wording used throughout this RFP. Failure to satisfy any term or condition of this RFP may result in an unacceptable Proposal.

**Facsimile Proposals will not be accepted.**

**Vendors must sign and return this form with their Proposal.**

Enclosed is our Proposal submitted in response to this RFP. The Vendor consents, and has obtained written consent of any individuals identified in the Proposal, to the use of the information in the Proposal by:

- (a) Her Majesty;
  - (b) Her Majesty's employees; and
  - (c) individuals and organizations under contract to provide services to Her Majesty;
- to enable Her Majesty to evaluate the Proposal and use this information for other program purposes of Her Majesty.

\_\_\_\_\_  
 Vendor Name

\_\_\_\_\_  
 Address

\_\_\_\_\_  
 Telephone

\_\_\_\_\_  
 Facsimile

\_\_\_\_\_  
 Authorized Signature

\_\_\_\_\_  
 Print Name

\_\_\_\_\_  
 Title

\_\_\_\_\_  
 Date

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**1. INTRODUCTION**

Vendors are invited to submit Proposals for the provision of the services and/or Materials as specified in this RFP.

This RFP will be conducted with the objective of maximizing the benefit to Her Majesty, while offering Vendors a fair and equitable opportunity to participate.

The purpose for collecting the information for this RFP is to enable Her Majesty to ensure the accuracy and reliability of, and to enable Her Majesty to evaluate, the Vendor's Proposal to this RFP and for other program purposes of Her Majesty. Authority for this collection is the Government Organization Act, Schedule 12, as amended, revised or substituted from time to time. The Vendor may contact the Contracting Manager regarding any questions about the collection of information pursuant to this RFP.

**2. SUMMARY OF THE REQUIREMENT**

*Insert a brief description of the requirements. A sample format is provided below:*

*The purpose of this RFP is to establish a long term relationship with a Vendor to provide Tier I Services as detailed in this RFP.*

*The Contract will include all I.T. services presently delivered to the Ministry by (e.g. an inhouse I.T. organization, service agreements with (name of vendor(s)) for (describe type of service). The scope of the Tier 1 Services is as follows:*

- *strategic/planning services;*
- *technical support services;*
- *LAN support;*
- *desktop and production support;*
- *application support; and*
- *client services administration and support*

*Specific details of the Tier 1 Services are provided in section \_\_ and Appendix \_\_ of this RFP.*

*In addition to the Tier 1 Services, the successful Vendor will have the opportunity to provide Tier II Services for the Ministry's new application systems development projects, technology infrastructure changes and major system enhancement projects that exceed (insert number) person days, based on acceptable proposals.*

**3. RFP TERMINOLOGY**

Throughout this RFP, terminology is used as follows:

**Alberta Corporate Service Centre** means Her Majesty the Queen in right of Alberta, as represented by the Minister of Government Services.

**Alberta Government Services** means Her Majesty the Queen in right of Alberta, as represented by the Minister of Government Services.

**Alberta Time** means Mountain Standard Time or Daylight Saving Time as provided for in the Daylight Saving Time Act of Alberta.

**Business Day** means 8:15 a.m. to 4:30 p.m., Alberta Time, on a Monday to Friday, excluding holidays observed by Her Majesty.

**Business Hours** means 8:15 a.m. to 4:30 p.m. Alberta Time on Business Days.

**Consortium** means two or more Vendors who together submit a Proposal.

**Contract** means the written agreement between the successful Vendor and Her Majesty to provide the Services and/or Materials contemplated by this RFP.

**Evaluation Team** means individuals who will evaluate the Proposals on behalf of Her Majesty.

**Her Majesty** means Her Majesty the Queen in right of Alberta.

**I.T.** means Information Technology.

**Materials** mean all the working papers, surveys, notes, plans, designs, reports, records, studies, drawings, examinations, assessments, procedures, specifications, evaluations, results, conclusions, interpretations, calculations, analyses, systems, software, source code, documents, writings, programs, hardware, devices, data or any components of these, regardless of how they are represented, stored, produced, or acquired.

**must, mandatory, required, shall** means a requirement that must be met in a substantially unaltered form in order for the Proposal to receive consideration.

**Prime Vendor** means the Vendor in a Consortium that assumes responsibility for the provision of all Services and/or Materials and is accountable for all terms and conditions of the Contract.

**Proposal** means the Vendor's response to the RFP and includes all the Vendor's attachments and presentation materials.

**Request for Proposals (RFP)** means this solicitation for the Services and/or Materials.

**should, desirable** means a requirement having a significant degree of importance to the objectives of the RFP.

**Supply Management Branch (SMB)** means the Contracted Services Section of Alberta Government Services of Her Majesty.

**Tier 1 Services (Services)** means the I.T. services, as identified in this RFP, to be provided by the successful Vendor.

**Tier 2 Services** means I.T. services that may be provided by the successful Vendor on the acceptance by the Ministry of a proposal in accordance with the process specified in this RFP.

**Vendor** means an individual organization or a group of organizations (Consortium) responding to this RFP with a Proposal.

**Year 2000 Compliant** means that the hardware and/or software and any modifications, enhancements, upgrades, or other changes to the hardware and/or software, provided for under the Contract, are capable of recording, sorting, calculating, storing, presenting and otherwise processing without error or misinterpretation, all dates and date-related data prior to and during the year:

(a) 2100 for software developed for or in relation to the Contract.

(b) 2000 and for twenty (20) years after completion or termination of the Contract for all hardware and all other software.

For the purposes of this definition, date-related processing shall include leap year calculations.

Headings are used for convenience only, and they will not affect the meaning or interpretation of the clauses.

Words in the singular include the plural and vice versa.

References to “*insert Ministry name*”, “Her Majesty”, “Ministry” “Supply Management Branch”, “SMB” mean Her Majesty the Queen in right of Alberta and are used only for administrative purposes.

#### 4. **RFP PROCESS**

##### 4.1 **RFP Schedule of Events**

<b><u>Activity</u></b>	<b><u>Date</u></b>
RFP Issue Date:	<i>(insert date)</i>
Bidders' Conference:	<i>(insert date)</i>
Vendor Meetings with <i>(insert Ministry name)</i> :	<i>(insert date)</i>
RFP Closing date:	<i>(insert date)</i>
Evaluation of Proposals:	<i>(insert date)</i>
Best and Final Offer:	<i>(insert date)</i>
Shortlist Presentations:	<i>(insert date)</i>
Selection of Preferred Vendor:	<i>(insert date)</i>

The dates for Evaluation of Proposals, Best and Final Offer, Shortlist Presentations, and Selection of the Preferred Vendor are provided for information only. They are subject to change at the sole discretion of Her Majesty.

#### 4.2 Bidders' Conference

A Bidders' Conference has been scheduled to provide an opportunity for clarification regarding this RFP's requirements, and to address any other issues with this RFP:

Date:

Time:

Location:

To facilitate comprehensive responses at the Bidders' Conference it is recommended that written questions be submitted to the Contracting Manager in advance of the Bidders' Conference.

Attendance at the Bidders' Conference is not mandatory, but is highly recommended.

Written minutes of the Bidders' Conference will be distributed by MERX to all Vendors who have requested a copy of this RFP through MERX.

#### 4.3 Meetings with Ministry Representatives

Vendors may request to meet with Ministry representatives on an individual basis, on a scheduled meeting date following the Bidders' Conference, to further discuss this initiative. To qualify for a scheduled meeting, a Vendor must in the Vendor's opinion meet the Minimum Qualifications specified in Section 10 of this RFP.

If such meetings result in alterations to this RFP, a written update will be distributed by MERX to all Vendors who have requested a copy of this RFP through MERX.

Vendors possessing the Minimum Qualifications and wishing to schedule a meeting must complete the Vendor Pre-Qualification Form included in this RFP as Appendix A. This form must be submitted to the Contracting Manager at the address or fax number identified on the cover page of this RFP. Meetings will be *(insert number of hours)* in duration. In the event of Consortium Proposals, the Prime Vendor must request the meeting and include Consortium members as appropriate.

Vendors satisfying the Minimum Qualifications will be given the opportunity to select from one of the dates identified in the schedule. The order of selection for a meeting date will be determined on a first received, first choice basis (i.e. The first qualified Vendor request received by SMB will have the first selection of a scheduled meeting date).

The scheduled meeting dates are:

*(insert time period for meeting) - (insert date)*

*(insert time period for meeting) - (insert date)*

Location: *(insert address)*

**5. RFP PROCEDURES**

**5.1 RFP Availability**

Vendors must purchase this RFP directly from MERX operated by the Bank of Montreal or the Proposal will be rejected. SMB may, at any time and without notice, waive this requirement.

**5.2 Confidentiality and Security of Information**

The Vendor, the Vendor's employees, subcontractors and agents shall:

- (a) keep strictly confidential all information concerning Her Majesty and/or third parties or any of the business or activities of Her Majesty and/or third parties acquired as a result of participation in this RFP; and
- (b) only use, copy or disclose such information as necessary for the purpose of submitting a Proposal or upon written authorization of Her Majesty.

The Vendor shall maintain security standards, including control of access to data and other information, consistent with the highest standards of business practice in the industry.

**5.3 Freedom of Information and Protection of Privacy**

Her Majesty has passed the Freedom of Information and Protection of Privacy Act of Alberta as amended, revised, or substituted from time to time ("FOIP") and the Vendor shall abide by the requirements of FOIP in so far as applicable to its operations and the information the Vendor has access to, collects, or uses, as a consequence of carrying out its obligations under this RFP and the Contract.

**5.4 Vendor Questions**

All questions regarding this RFP must be directed to the Contracting Manager, in writing. Enquiries and responses will be recorded and may be distributed to all Vendors at Her Majesty's option.

The Vendor has a responsibility to notify the Contracting Manager in writing, of any ambiguity, divergence, error, omission, oversight, contradiction, or item subject to more than one interpretation in this RFP, as it is discovered, and to request any instruction, decision, or direction required to prepare the Proposal.

In order for SMB to deal effectively with Vendor questions about any terms or conditions of this RFP, such questions must be communicated in writing to the Contracting Manager at least seven (7) Business Days prior to the RFP closing date. Questions received after this time will be answered if time permits.

Verbal responses to enquiries are not binding on any party.

#### **5.5 Agreement on Internal Trade**

This RFP is subject to Chapter 5 of the Agreement on Internal Trade.

#### **5.6 Alternative Proposals**

If alternative Proposals are offered, the Vendor must submit each alternative in the same format as outlined in this RFP, as a separate Proposal. Proposed alternatives must substantially meet the fundamental intent of this RFP. The acceptability of alternative Proposals will be decided by the Evaluation Team.

#### **5.7 Conflict of Interest**

Vendors must fully disclose, in writing to the Contracting Manager on or before the closing date of this RFP, the circumstances of any possible conflict of interest or what could be perceived as a possible conflict of interest if the vendor were to become a contracting party pursuant to this RFP. SMB shall review any submissions by vendors under this provision and may reject any Proposals where, in the opinion of SMB, the vendor could be in a conflict of interest or could be perceived to be in a possible conflict of interest position if the vendor were to become a contracting party pursuant to this RFP.

#### **5.8 Irrevocability of Proposals**

Vendors may amend or withdraw their Proposal prior to the closing date and time by submitting a clear and detailed written notice to SMB. Subject to section 5.14, all Proposals become irrevocable after the RFP closing time and date.

#### **5.9 RFP Closing**

This RFP will close at 14:00:59 Alberta Time on the RFP closing date. Proposals shall be received by SMB before 14:01:00 Alberta Time on the RFP closing date. For RFP closing purposes the official time of receipt of Proposals shall be as determined by the time recorder clock used to time and date stamp Proposals upon submission to SMB.

#### **5.10 Proposal Submissions**

**Facsimile Proposals will not be accepted.** Proposals may be delivered by hand, courier or mail. In responding to this RFP, your attention is drawn to the following:

- a) The cover page of this RFP must be completed, signed by an authorized representative of the Vendor and included as the first page of the Proposal.
- b) Proposals received unsigned or after this RFP's closing date and time will be rejected.
- c) Ambiguous, unclear or unreadable Proposals may be cause for rejection.
- d) Vendors must submit the original (bound), four (4) bound copies (bound in such a manner that the pages lie and remain flat when opened) and one (1) unbound copy of the Proposal in a sealed envelope clearly marked and addressed as follows:

Contracted Services Section  
Supply Management Branch  
Alberta Corporate Service Centre  
Alberta Government Services  
2<sup>nd</sup> Floor, 12360 - 142 Street  
Edmonton, Alberta  
T5L 4X9

Attn: \_\_\_\_\_  
RFP# \_\_\_\_\_; Closing Date: \_\_\_\_\_.

#### **5.11 Proposal Public Opening**

Proposals shall be opened publicly at SMB, 2<sup>nd</sup> Floor, 12360-142 Street, Edmonton, Alberta immediately following RFP closing.

#### **5.12 Vendor Expenses**

The Vendor is responsible for all costs of preparing and presenting their Proposal and for subsequent negotiations with Her Majesty, if any.

#### **5.13 Proposal Return**

Proposals and accompanying documentation submitted by Vendors are the property of Her Majesty and will not be returned.

#### **5.14 Period of Commitment**

Proposals shall be final and binding on the Vendor for 180 days from this RFP's closing date and time and may not be altered by subsequent offerings, discussions, or commitments unless the Vendor is requested to do so by SMB. The Proposal shall be used as the basis for the Contract.