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1. INTRODUCTION

1.1 ENTERPRISE SERVICE MANAGEMENT PLATFORM

Request for Proposals PS20170690 (the "RFP") seeks proposals from prospective Proponents for the acquisition of an Enterprise Service Management solution to enable the City of Vancouver ("City") to effectively manage standard workload services for both IT and non-IT business units. This Annex 1 – Schedule of Requirements will serve as a starting point for the Scope of Work and Statement of Work which will be included the final executed Form of Agreement between the City and the successful Proponent.

The solution is expected to be a comprehensive one that is based on field-tested software and technical components. The overall architecture, configuration, implementation, as well as post-implementation warranty and support will be provided by a Prime Contractor, who may lead a team of sub-contractors contributing each of their respective components and/or expertise.

The solution will include hardware (that is recommended by the Proponent, but not necessarily committed by the City to purchase), installation, configuration, maintenance, support and services, and will enable the City to perform the following:

Phase 1 of the Enterprise Service Management Project is the selection and implementation of an Enterprise Service Management platform. The tool selection process is aligned with the requirement to replace the existing ITSM system (SDE) which will be no longer supported by the vendor as of December 31st 2017. The system is currently used by the Help Centre, IT teams and specific business units (including Vancouver Police Department and Vancouver Public Library) to manage incident and change tickets, and to store knowledge articles. The system is critical to the running and maintenance of IT services.

Requirements for the new system are aligned with strategic goals of improving enterprise resilience and investing in core capabilities and process maturity. Hosting the new system in the Cloud improves resilience – an offsite location for the system used to manage major incidents and store critical technical will not be impacted by a local on-site outage.

Selection of a modern tool conforming to ITIL 3.0 standards supports the implementation of industry best practices/terminology, increasing the maturity of the City's IT services and infrastructure.

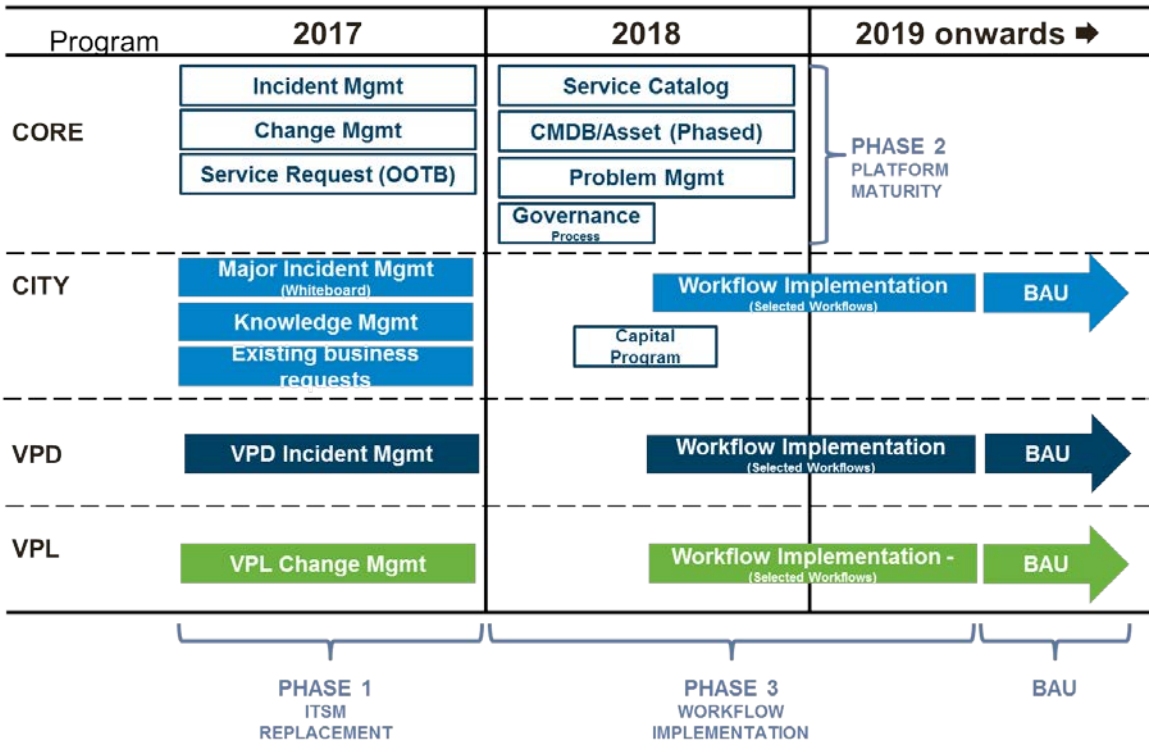
In addition to assisting in maturing IT processes and services, the selected platform requires the capabilities to allow the City to provide workflow management and request tracking functionality to other business units (non-IT) to manage service demand.

Phase 1 is limited to establishing the core platform and moving the existing Incident and Change Management functionalities, with future phases to extend the workflow automation capabilities to IT and other Business Units.

The new solution will ensure:

- Technical architecture is based on a common and open platform that can integrate with a variety of City technology platforms including SAP, AD, and SQL.

- Scalability and adaptability to future business needs and technology changes;
- Adherence to City, Provincial and Federal policies and regulations regarding Privacy and Data; and
- Continuous enhancement of "Best Value" to the City: the City desires a solution that will either meet or exceed its platform requirements prescribed herein.



1.2 TECHNOLOGY SERVICES DIVISION

The Technology Services division provides IT/technical services and support to City of Vancouver employees, and in limited capacity, to Vancouver Police Department (VPD) and Vancouver Public Library (VPL).

Technology Services is staffed by 220 employees, who support over 400 applications and 5000 devices across 110 distributed sites.

ANTICIPATED USER ROLES

Table 1- Anticipated User Roles

Employee Role	Description	Type of Interaction
Requestor	Any City employee	Accesses and searches main portal for service information or knowledge base articles Can access and search Service Catalog for appropriate services based on division and/or role Submits a request to a fulfilment team (can be technical or non-technical) Tracks status of request and submits or views updates via the ticket
Approver	Usually a people manager; May also be a specific role (ie: security approver for specific system)	Approves or rejects requests submitted by their team (example: request for system access; request for purchasing an item with a cost; request for any item requiring manager approval)
Fulfiller	Any team that provides a product or service to internal employees; can provide support, incident resolution, or provision of service requests. May also participate in the Problem management process Can be technical (IT), or non-technical (example: Facilities, HR or any other business unit providing a product or service listed in the Service	Create, View, Update and Resolve Incident and Service Request tickets; submit or update Change tickets. Use Mobile app to access and update tickets or access the Knowledge base. Manages individual workload / management of assigned tickets. Can assign/reassign to others. Uses the system to update and communicate with requestors.
Fulfilment Team manager	Manager of a team that fulfils incident, service request, or change tickets, or is involved in the Problem Management process	Manages team workload; handles escalations; may handle ticket reassignment. Monitors SLA's and takes action to prioritize appropriate action to meet SLA's and team goals. May provide sign-off or approval for certain items, including change requests. Utilize dashboards, reports and graphics to understand team activities and performance, and to communicate workload and performance results with senior managers.
Helpdesk / Help Centre Representative	Receive calls from employees seeking information or advice, requests for service, and reporting	Creates Incident and Service Request tickets; update and close tickets as per ITIL process Extensively utilize Knowledge Base for assisting callers with information; manage and maintain Knowledge base.

ANTICIPATED USER NUMBERS

Table 2 Estimated User Numbers by Role

Org	Description	Role	Current	2018	2020
COV	IT Help Centre	HelpDesk	20	20	20
COV	IT Fulfilment (non Help Centre)	Fulfiller	180	180	180
COV	CoV Requestors	Requestors	5000	5000	5000
COV	CoV Approvers	Approvers	450	450	450
COV	Business Unit Fulfillers	Fulfiller	65	200	500
VPD	VPD Fulfilment	Fulfiller	33	36	38
VPD	VPD Requestors	Requestors	2800	2856	2913
VPD	VPD Approvers	Approvers	3	3	3
VPL	VPL Help Centre	Helpdesk	11	11	12
VPL	VPL Fulfilment (IT)	Fulfiller	2	22	22
VPL	VPL Fulfilment (Business)	Fulfiller	10	10	25
VPL	VPL Requestors	Requestors	830	830	930
VPL	VPL Approvers	Approvers	50	50	50

	Current	2018	2020
Helpdesk	31	31	32
Fulfilment	308	448	765
Requestors	8630	8686	8843
Approvers	803	803	803

TECHNOLOGY SERVICES INCIDENT & SERVICE REQUEST TRENDS (2012 – 2016)

Table 3 Ticket Request Trends 2012-2016

Type	2012	2013	2014	2015	2016
Incident	21K	15.5K	15K	14K	11K
Service Request	55K	55.5K	60K	60K	68K
Total IM & SR	76K	71K	75K	74K	79K
Change Management	-	0.5K	1K	1.3K	1.4K

1.3 CURRENT STATE OF TECHNOLOGY WITHIN THE CITY OF VANCOUVER

The primary user of the current SDE system is the IT – HelpCentre which services over 5000 City, and VPD employees to ensure the efficient provisioning of IT hardware and software, resolve employee issues and queries, schedule City-wide IT and process changes and manage all IT related support requests. The IT – Help Centre processes 90,000+ tickets per year and manages 4400+ devices for City employees, 1800 for VPD and 1400 for VPL.

The current system is highly customized and has been negatively impacted by required upgrades (reducing previously available functionality).

The mandate for the new tool is to utilize "out-of-the-box" functionality unless there is an approved business critical exception (an example includes the special handling of PCI devices). Adoption of "out-of-the-box" serves two purposes – aiding in adoption of industry best practices and terminology, and reduces the risk of future upgrades impacting City IT services.

Because the current tool will reach end of life by Dec 31st 2017, this project has a tight scope to move the existing functions (IM, CM, SR, KM, and existing business workflows) to the new tool in phase 1. This is critical to ensure the City has a functioning system to capture and track tickets and manage incidents.

The longer term goal (2018/2019) is to utilize the new tool to deploy an Enterprise wide Service Catalog, initially providing a central portal for all IT services, and then extending the tool to other business units – providing ticket handling, demand management and workflow automation capabilities to business units outside of IT.

Implementation of Service Catalog increases transparency of provided services, with defined Service Level Agreements and a "shopping cart" view for the client to track their request. Manager approval processing will move from a manual, email based process to a routed workflow managed within the tool. Future phases will consider password reset and client self-service opportunities.

Behind the scenes, teams will be better able to manage their queues, with workflows established for standard requests (requests are currently handled as an "incident' ticket, with a manual classification to service request); automatic ticket routing into workflows, and the ability to route tickets to one or more teams.

The new system is to provide improved reporting and analytics, allowing management to view their teams work intake in a single system (a number of teams have developed their own homegrown sites to manage work intake that can't be handled in the current tool). Staff will be able to better prioritize their workloads– viewing their assigned tickets and approaching deadlines, with the ability to manage tickets from a mobile device.

For the IT Help Centre staff and management, this Enterprise Service Management product manages all aspects of their work, , solution management, knowledge base, business process sequencing and work flow. This is the key software that underpins all the work the help centre carries out for staff out on a day-to-day basis.

2. PROJECT DETAILS

2.1 PROJECT ROLLOUT APPROACH AND SCOPE OF WORK – OVERVIEW

Where feasible, the City envisions the implementation of the proposed solution in phases. It would be desirable to roll-out a core system first. That is, rolling out those solution functions that are equivalent to the current system core functionality, then adding additional functionality in future phases. The intent is to speed up the release of the core system and reduce the inherently higher level of risk associated with rolling everything out at once.

2.1.1 Project Scope of Work

a) Solution Implementation. Furnish, install, and implement an Enterprise Service Management Platform that meets or exceeds the Functional and Technical Requirements;
b) Processes and Procedures to ensure Business Continuity. The proponent must provide details outlining their processes and procedures to ensure City business continuity and system availability;
c) Reports. Provide required reports and statistics and functionality to perform ad-hoc queries and reports as needed by the business;
d) End-user Application Training and Documentation. Provide hard copy and web-based (and/or recorded) training and documentation;
e) Software Licenses. The Proponent shall provide all licenses for the proposed solution provided to the City – note: details of the user license to be provided by the Proponent must be clearly stated in the Proposal;
f) Warranty and Service. Once the solution is accepted by the City, the Proponent will provide all required services to ensure adequate technical support and maintenance both during roll-out; continuing thereafter for future prescribed periods, details of which will be defined within support and maintenance agreements with the City prior to contract award. The Proponent will work with the City's representatives to develop and agree upon a Service Level Agreement (SLA) which details all service expectations, and which will be attached as a schedule in the executed form of agreement;
g) End-to-End Performance Test. Conduct an end-to-end, full solution Performance Test and Quality Assurance Tests in accordance with the requirements set out in this RFP;
h) System Acceptance Certification. Certify the installed solution has met all conditions outlined in the Solution Acceptance section of this document and the requirements in Annex 2; and
i) Enable Future Enhancements. Remain technologically relevant, scalable, and extensible to accommodate future solution enhancements that will be required to satisfy operational requirements, inclusive of the provision of a technology platform/application solution that meets requirements specified in Functional and Technical requirements set out herein.

The outcome of this scope of work will provide the City with a modern, integrated, highly available, cost-effective Enterprise Service Management Platform that will enhance effective operations and enhance current business process improvement initiatives.

2.2 EXPECTATIONS OF ENTERPRISE SERVICE MANAGEMENT PLATFORM TO EMPOWER CITY BUSINESS

Tracking standard operational workload is currently handled via multiple methods across business units, with varying levels of automation and reporting. With different systems in place, and differing levels of information available to connect or rollup, it is difficult to see a holistic view of products and services available, predict workload, and to manage workflows that span multiple teams or business units. The requestor may need to make multiple submissions via email, phone, or multiple computer systems.

The introduction of an Enterprise Service Management platform provides a central system for managing business as usual workload. Services can be streamlined and standardized – increasing productivity by reducing duplication and manual processes. Data rolled up across teams and business units provides opportunities for aligning operational work to strategic business goals, identifying emerging trends, or resolving bottlenecks.

The Enterprise Service Management platform is to provide a customer focused portal for requesting services or support across all business units. Business units will be empowered to optimize service delivery through workflow automation, information sharing and reporting/data analysis. The platform will provide a holistic view of service management across the organization.

2.3 CITY APPLICATION ARCHITECTURE EXPECTATION

The City places a strong emphasis on delivering value to its citizens. Generating value means using resources efficiently. Purchased products and services need to fit well within the City environment, and be sufficiently open such that the City can adjust the use of its assets based on the changing needs of the organization.

It is critical that the Proponent provide the City with a solution that has application architecture which:
- can be easily augmented with additional functionality; and
- allows for the interchange of data freely with other systems; and
- provides documented web services and API.

The City desires the architecture of the proposed solution to be open, please refer to ANNEX 3 Tab 1.0 – IT Architecture, for the City's application architecture expectations.
The City places a strong emphasis on delivering value to its citizens by implementing proven Commercial Off-The Shelf (COTS) applications which are designed to meet specific business needs. Solutions that require extensive customization or 3rd party applications (that are not part of the prime vendor contract) are discouraged.

3. REQUIREMENTS

3.1 INTRODUCTION

3.1.1 The City prefers to procure a system that is proven in the market; therefore, the Proponent's proposed solution should satisfy the following criteria:

1. The current version of the proposed solution should be in full production for a period of at least 6 months; and
2. The solution should be utilized in at least two (2) government organizations of similar complexity as the City, and have been fully operational for a minimum of one (1) year.

3.1.2 All scenario requirements are documented in three spreadsheets:

Annex 2 – Detailed Functional Requirements spreadsheet

- Overall Solution
- Global
- Core Platform
- Incident Management
- Change Management
- Service Request Management
- Service Catalog
- Knowledge Management
- Problem Management
- Self Service
- Workflow Automation
- Asset Management / CMDB
- Service Level Management
- Mobile Solution

Annex 3 – Detailed Technical Requirements spreadsheet

- Architecture
- IT Standards
- Support
- Mobile
- Integration
- Data Management
- Cloud Option (if applicable, Appendix 15 – Cloud Computing Questionnaire should be completed)

Annex 4 – Scenarios

- Major Outage (Citywide & VPD)
- Simple workflow for a Business Unit
- New item in the Service Catalog
- Change Request Lifecycle

- Field Service Technician (Mobile Solution)
- Out-of-the-box Implementation

3.1.3 Appendix 15 – Cloud Computing Questionnaire is required to be completed for any cloud-based solution.

FREEDOM OF INFORMATION PROTECTION ACT, SBC 2003, C. 36

Some information contained within the Solution may be considered sensitive by the BC Privacy commission; the City has a responsibility to the Public that all information contained within the solution is input, stored, accessed and destroyed in accordance to BC FOIPPA legislation.

The Proponent must comply with all Canadian security and privacy policies:

i. BC's Personal Information Protection Act, SBC 2003 c. 36
ii. Federal Personal Information Protection and Electronic Documents Act, SC 2000 c 5
iii. Freedom of Information and Protection of Privacy Act, RSBC 1996, c 165 (FOIPPA)

The City may consider either an in-house or a cloud-based solution architecture. To adhere to the privacy legislation, all data centres of a cloud-based solution must be hosted in Canada. All cloud-based proposals will require a completed Appendix 15 – Cloud Computing Questionnaire.

4. PROJECT MANAGEMENT AND SOLUTION DELIVERY SERVICES

4.1 OVERVIEW

4.1.1 Project Approach

Within fifteen (15) business days of the City's written notification of contract award to the Proponent, the Proponent shall provide a Project Implementation Plan & Schedule (PIPS) which contains more specific deliverables and timelines not contained in the initial PIPS submitted in the Proposal. The deliverables shall describe in detail the milestones, task responsibilities, and time frames for: system configuration, installation, integration, testing, training, and full system cut-over for implementation.

4.1.2 Project Planning Phase

The project kick-off meeting will begin the Planning Phase of the project. This effort will establish the approach to the configuration and implementation of the Proponent's solution. During the kick-off meeting, the Proponent and the City will jointly discuss timing and staffing issues that will impact the timeline. The result of the sessions shall be an updated implementation plan and schedule. The City will approve the sequence of implementation following the completion of the Project Planning Phase.

4.1.3 Project Communication Platform

The selected Proponent and the City Project team will be required to share information, messages, and documents. The Proponent shall be responsible for the creation and maintenance of a collaborative environment which is available to both the City project team members and the Proponent project team members. Both the City and Proponent Project Managers will have access within the project communication platform to add, edit, and remove members of their teams. All project deliverables and documents will be stored in a location accessible to both teams.

4.1.4 Project Deliverable List

The following table identifies the expected timeline of the project deliverables to be provided by the Proponent to the City. Items are to be delivered to the City within the number of calendar days listed in the due date column. Deliverable due dates are dependent upon the City's issuance of a written notification of contract award, the timing of the deliverable due date shall be expressed in terms of date of written notification of contract award + X calendar days. The Proponent's ability to invoice will be measured against the completion of written and accepted deliverables.

Proponents should complete the following table with the proposed milestone dates that are timely, achievable, and can be supported by the Proponent's team.

Table 4 Deliverable Timetable

Deliverable #	Deliverable Title	Due Date
1.	Written Notification of Contract Award (issued by the City)	
2	Project Implementation Plan and Schedule (PIPS) – including detailed deliverables and timelines, subject to the City's review and approval • To be maintained by the proponent	Notification of Contract Award +15 days
3	Gap Analysis Document	see Footnote 1
4	Solution Design Document (SDD) - Assuming that there are gaps in functionality and customization will be required	see Footnote 1
5	Solution Testing Plan (STP) – includes functional testing & user acceptance testing	see Footnote 1
6	Solution Acceptance Criteria - Initial	see Footnote 1
7	Solution Administration Guide	see Footnote 1
8	Integration and API Procedure Details	see Footnote 1
9	Solution User Guide	see Footnote 1
10	Solution User Training Plan	see Footnote 1
11	Solution Issues and Defect Report	see Footnote 1
12	Solution Test Results Report	see Footnote 1
13	Deliverable Delivery Confirmation Log • Solution Receipt • Acceptance Report	see Footnote 1

Footnote 1: the dates will be determined and included in the Proponent's Project Implementation Plan and Baseline Schedule (PIPBS). At a minimum, the Proponent's PIPBS shall have each of the above deliverables specified above in its submitted document.

4.2 PROJECT IMPLEMENTATION PLAN AND SCHEDULE – DETAILS

The Proponent is responsible for the development and maintenance of the Implementation Plan and Schedule, which, at a minimum, must include:

a) Scope and goals of the Implementation Plan;
b) Advantages and challenges, assumptions, and prerequisites of proposed approach;
c) Expectations from City;
d) Detailed timeline;
e) Sequence of deployment tasks;
f) DARCI Matrix (Decider, , Accountable, Responsible, Consulted, Informed); and
g) Sequence and schedule of implementation.

4.2.2 The plan should also take into consideration, and include all aspects of business unit & project team readiness such as:

a) Schedule & Availability;
b) Change management;
c) Communication activities;
d) Providing user support post Go-Live;
e) Identifying and resolving impacts;
f) Testing;
g) Training;
h) Interfaces;
i) Hardware; and
j) Reports & Analytics.

4.2.3 The Proponent shall execute the Implementation Plan as approved by the City.

4.3 CITY'S RESPONSIBILITIES

The City shall provide the following:

4.3.1 **Steering Committee.** The project oversight body is made up Managers and Directors representing the City.

4.3.2 **Project Business and Technical Support Group.** The project working group is made up of the key stakeholders from the City's business and technology groups.

4.3.3 **Project Management.** The City will assign a dedicated Project Manager to serve as a single point of contact to the Proponent. The City's Project Manager's duties include, at a minimum

- Coordination of project plan development;
- Schedule coordination;
- Management of City's project team;
- Monitoring and facilitating approval of deliverables;
- Authorizing payment of invoices, pending approval of deliverables;
- Assuring Proponent is provided with sufficient access to both technical and business knowledge experts to maintain the project schedule;

- Providing project status reports to City governance authorities; and
- Providing City Change Management documentation.

4.3.4 **City Project Resources.** The City shall provide relevant resources to support the implementation of City's components within the Proponent proposed solution. **Note:** The Proponent is responsible for describing the resources required to be provided by the City, by developing a RACI matrix within the project plan deliverable and specifying any other required resources. The City will make reasonable efforts to provide the requested resources

4.3.5 Coordination of all project meetings between the Proponent and applicable City functional and IT technical team members.

4.3.6 Work space, electrical power, and associated physical device connectivity within City's facilities for Proponent personnel, where required.

4.3.7 Network-related troubleshooting as it relates to the implementation of the solution, with assistance from the Proponent as necessary and as requested by the City.

4.3.8 **Solution Integration with City Applications.** The City shall provide an Integration Team and Services responsible for:

- Assisting the Proponent in validating the solution integration capabilities

4.3.9 **Solution Testing.** The City will participate in the testing process by providing input into the development of testing success criteria

4.3.10 **Change Management Approval.** The City Project Manager will have the sole approval authority for any Prime Contractor- or subcontractor- requested changes which impact the scope, cost, or timeline of the implementation and general roll-out. The City Project Manager shall validate and obtain required City approvals before any requested changes, as described above, can be made.

4.4 PROPONENT'S RESPONSIBILITIES

4.4.1 **Solution Installation and Integration.** From an integration perspective, the Proponent will be responsible for:

- Providing, configuring and installing (if necessary) all aspects of the Solution, and any additions deemed necessary, to enable the system to operate according to all functional, technical, and system level performance specifications presented herein and in the RFP Attachments;
- Where the proponent has a proven integration solution with existing city applications, they will be responsible for providing the framework and technology to enable integration between the Solution and City applications;
- Configuring the proposed solution to City's requirements;

4.4.2 **Proponent Solution Testing.** The Proponent is required to plan, execute and verify testing of the proposed Solution, including, but not limited to:

a) Creating an end-to-end test plan for review and approval by the City;
b) Coordinating with the City to document the solution acceptance criteria for each project implementation phase;
c) Unit-testing of all hardware, customizations and user interface(s);
d) Demonstrating functionality of all Solution components;
e) Demonstrating accomplishment of functional and non-functional requirements;
f) Demonstrating reporting and analytic capabilities which address the quantifiable business benefit tracking;
g) Validating integration between the proposed Solution and City applications;
h) Load- and performance-testing;
i) Demonstrating high availability and failure recovery mechanisms, including:
    - Fail-over and fall-back of data centre systems (if hosted);
    - Restoration of services to a cold-standby site (if hosted);
    - Device recovery in the event of power and/or signal loss; and
    - Stress testing.
j) Security and penetration testing; and
k) Demonstrating service-desk and troubleshooting procedure

4.4.3 **Project Management.** The Proponent shall designate a Project Manager who will be responsible for the management, oversight, delivery, and coordinating resolutions to the project and any associated issues. The Proponent's Project Manager will also be the primary/single point of contact for Proponent communications related to the project. For the period from contract initiation, through to the end of the Proponent's Solution's acceptance period, the Proponent's Project Manager shall provide weekly project status reports, which, at a minimum, shall include:

a) Significant work plan tasks performed during the reporting period, and a review of the completed tasks and comparing to plan;
b) Identifying project risks and documenting recommendations to mitigate such risks;
c) Deliverables completed during the reporting period. Identifying milestones reached and comparing to plan;
d) Significant work plan tasks planned for the next reporting period;
e) Deliverables expected to be completed in the next reporting period;
f) Identifying problems or issues and tracking status of problems/issues;
g) Documenting what mitigation effort and plan is being done to achieve resolution of problems/issues; and
h) Project notes and comments

4.4.4 The Proponent must provide well-trained technical, support, and consulting staff that keep current with the latest technologies, and are fully knowledge in the Proponents' Solution, its features, configuration, and integration.

4.4.5 The Proponent shall be required to be on-site for the duration of the system cutover to the live production system, and the Proponent shall identify any requirements for Proponent onsite presence during post-implementation.

4.4.6 The Proponent shall use existing documentation provided by the City (such as functional business and technical requirements). The Proponent shall ensure that the solution is in compliance with the City's bylaws and the solution meets the solution requirements.

4.4.7 Compliance with the following at all times, when conducting activities within any City facility:
a) Provisions of all applicable directives of the City and its agencies;
b) Regulations of City Security Standards; and
c) All applicable Federal, Provincial, and Municipal statutes, ordinances, laws, regulations, codes, directives, and/or orders

4.4.8 Participate in meetings with City's Project Business and Technical Working Group and/or Project Team, as directed by the City's Project Manager

4.4.9 Communicate the delivery schedules of all Solution delivery implementations to allow the City the ability to track installation and to coordinate testing and acceptance. The delivery shall correspond to the Project Implementation Plan and Baseline Schedule (PIPBS) as per the requirements of this RFP.

4.4.10 Implement all aspects of the solution, to support the City's implementation and general roll-out of the solution.

4.4.11 Comply with the City's Change and Configuration Management procedures, including any configuration or customization requirements not specified within this document. The Proponent will be responsible for notifying the City's Project Manager to coordinate approval of any proposed Change Requests, or Configuration Management updates prior to installation.

4.4.12 Coordinate all project-related activities through the City's Project Manager.

4.4.13 Ensure timely and accurate identification and notification of issues, problems, and defects in the solution, work plan, or any other effort related to the project's scope of work, or the solution.

4.5 PROPONENT'S KEY PERSONNEL

4.5.1 The Proponent shall provide the key personnel identified below. Key personnel must be available when necessary to meet the requirements of the solution. The Proponent may not assign key personnel to other Proponent projects in any way that results in a conflict in their ability to meet the requirements of the contract. Nor should the Proponent propose any key personnel in a dual role (such as the Project Manager also as the Senior Systems Engineer). The Proponent shall provide those individuals accepted as key personnel throughout the contract term, except as provided in "Substitution of Key Personnel" Section 4.5.2 below.

Key Personnel Qualifications:

a) The Proponent shall certify that key personnel meet the qualifications identified in this RFP (refer to "Qualifications for Key Personnel" Section 4.5.3 for further details);

b) The Proponent shall provide a brief professional resume for each Proponent proposed resource; and

c) On a case-by-case basis, Proponent key personnel may be interviewed and approved by the City for performance in multiple skill categories for which they are qualified.

4.5.2 **Substitution of Key Personnel**

a) Stability of key personnel is critical to project success. For this reason, the Proponent shall retain key personnel interviewed and accepted by the City for a minimum period beginning from the receipt of a written notification of contract award and a Purchase Order, and ending upon successful implementation. All proposed substitutes for key personnel, for reasons other than emergency situations (illness, death, emergency resignation, or emergency disciplinary termination), shall be submitted in writing at least ten (10) business days in advance of the substitution, and the nominated individuals must be approved by the City's Project Manager prior to the proposed substitute's commencement of work on the Project;

b) The Proponent shall permit the City to interview and accept any proposed substitute for a key employee. The resume of any proposed substitute shall be signed by the substitute and by the Proponent's Project Manager and the resume of the previous key employee shall be provided for comparison purposes;

c) City Project - Project Manager must agree to the substitution in writing before the substitution becomes effective;

d) Any proposed substitute for a key employee shall have qualifications at least equal to those submitted in Proponent Personnel Resume. The responsibility for illustrating this comparison belongs to the Proponent; and

e) If one or more key personnel are unavailable for work under the contract for a continuous period exceeding ten (10) business days, the Proponent will be required to immediately provide written notification to the City's Project Manager, and at the city's discretion, to replace the personnel with approved substitutes of equal or better qualifications within ten (10) business days after providing the City's Project Manager with the written notification.

4.5.3 **Qualifications for Key Personnel**

a) **Project Manager (PM)** - The PM is assigned the management of the Proponent's proposed solution, and project for the work performed under the contract. S/he performs day-to-day management of the project, identifies issues and risks, and recommends possible issue and risk mitigation strategies associated with the project. The PM acts as a facilitator between the City and the Proponent. The PM is responsible for ensuring that work performed under the contract is within scope, consistent with requirements, and delivered on time and on budget. Identifies critical paths, tasks, dates, testing, and acceptance criteria. The PM provides solutions to improve efficiency (e.g., reduce costs while maintaining or improving performance levels), monitors issues and provides resolutions for up-to-date status reports, and demonstrates excellent writing and oral communications skills;

b) **Senior Application Systems Specialist** - Must be able to analyze information requirements. Must be able to evaluate problems in workflow, organization, and planning. Develops appropriate corrective action. Ensures the proposed Solution interface, reporting, analysis tools, integration parameters and processes address the requirements for the system.

c) **Integration Architect** - The Integration Architect is responsible for ensuring that the proponent's Solution effectively communicates via published API's using industry standard programming languages. In particular, this role will need to assure integration capabilities to the City environment.

5. TESTING, TRAINING, IMPLEMENTATION & ACCEPTANCE

5.1 TESTING

Within the Solution Test Plan deliverable, the Proponent shall describe the procedures for such testing, as well as how the Proponent will support the following testing methodology and timeline to incorporate the following test types and scenarios.

5.1.1 **Develop Solution Test Scripts and Expected Outcomes**

The Proponent must develop detailed system test scripts and expected outcomes from the detailed design documents and the Solution Test Plan, which should include the following:

a) Test scripts and expected outcomes encompassing all modules and business functionalities for each project phase;
b) Submit a comprehensive test data set, aligned to the test scripts and expected outcomes.

5.1.2 **Conduct Solution Testing**

a) The City and Proponent are responsible and accountable for conducting system testing of the proposed Solution (detailed and stress tests);

b) For the duration of the lifespan of the solution, the Proponent should support a development and/or testing environment, in which new hardware, functionality, reports and workflows will be tested by the business prior to implementation in a Production environment.

c) Depending on the origin of any issues arising from the test events, the Proponent must resolve all issues (defects), under their control, that are discovered during system testing. Any issues (defects) discovered that are under the City's direct control, the Proponent must assist and provide direction to ensure the defect resolution.

d) All test scripts and scenarios, which do not pass the system testing, must be addressed to the City's satisfaction prior to implementation.

e) The Proponent must log and track all defects until resolved in a defect-tracking tool, which will be available to the City project team for update and comments.

f) Based on the tests performed, the Proponent must develop a Solution Test Execution Report, which includes Testing Defects and Issues Log; and

g) The City will verify that the system testing process and testing results are in accordance with the System Test Plan and report any deviations. The Proponent must support the City during

the assessment. The Proponent must implement a mutually agreed scope of work based on the project phase testing results.

5.1.3 **Solution Test Execution Report.** At the conclusion of Solution Testing phases, the Proponent shall provide a test report and delivered to the City within five (5) business days of the testing phase conclusion that includes:

a) Completed and signed checklists documenting the successful performance of each inspection or test;
b) A detailed schedule for discrepancy correction and retesting;
c) A lessons learned document indicating what went well, and what did not, in the performance of the particular testing phase; and
d) A list of updates/revisions needed to the testing plans for any subsequent testing/retesting phases.

5.1.4 **Verify/Validate Stress Testing Process and Results.** The City will verify that the testing process and testing results are in accordance with the Test Plan and will report any deviations.

5.1.5 **Testing Data and Software.** The Proponent shall specify any requirements necessary for testing. The Proponent shall be responsible to create test data for all testing phases. The Proponent must provide a method that can be used for logging test cases and for defect tracking and resolution process (logs all test cases, results, and issue resolution). Sufficient time must be allocated to train City personnel on the testing expectations and procedures.

5.1.6 **Develop/Provide User Acceptance Test plan.** A User Acceptance Test ("UAT") Plan shall be created by the Proponent, with the assistance of the City acting as the primary guide for the execution of the User Acceptance Testing activity for all interfaces that the business or drivers will interact with. The user test scripts and scenarios will cover the complete Solution, all City modules, and interfaces.

5.1.7 **Execute User Acceptance Test.** A coordinated UAT where City project team and the Proponent will conduct user acceptance testing on the solution, based on test scripts provided by the Proponent.

If defects are identified during user acceptance testing, the Proponent shall address the defect and the Proponent will be responsible for implementing a mutually agreed scope of work based on the project phase testing results.

The Proponent is also responsible for updating all application and user documentation to be consistent with code that has been accepted and that will be promoted to the production environment.

5.1.8 **Testing Support**

The Proponent shall:

a) Conduct functional testing to ensure the data produced from the proposed solution addresses the scope of work of the project phase;

b) Provide on-site assistance to the City during Functional, Integration, and User Acceptance Testing of the solution for each project phase;

c) Provide error handling and disaster recovery procedures, which ensure the components of the application work in accordance with City requirements; and

d) The Proponent shall be required to update the testing plans and procedures based on feedback from the City, and provide the revised/updated plan(s) to the City at least five (5) business days prior to performance of the testing processes described above.

5.2 TRAINING

5.2.1 **Develop Training Plan**. The Proponent must develop a comprehensive User Training Plan Deliverable which must include/describe, at a minimum:

a) the prerequisite user knowledge required prior to beginning training, as well as expected learning objectives, areas of focus and outcomes for each component of the training;

b) details regarding the required materials, amount of time and expected learning objectives of each training course;

c) differences based on the area of focus of the training; and

d) Recommendations as to training details (how many per session, how long for each session, required materials & technology).

5.2.2 **Conduct Training.** The Proponent shall provide onsite training services for the following service types:

- Installation and troubleshooting;
- Solution Management: Administrative and configuration services;
- Reporting;
- Train the trainer; and
- General operation of the user interface.

The proponent shall be responsible for all training aids and manuals to be provided to each attendee, and also provided in electronic format.

The proponent is expected to provide cost details for further training sessions please include details for on-site and remote training opportunities).

5.3 IMPLEMENTATION

5.3.1 During the solution implementation, the Proponent shall provide the following:

a) Complete and timely installation, and coordination of all Installation processes with the City's Project Manager;

b) Confirm all Project Scope of Work and requirements for the solution have been met or addressed;

c) Prior to solution implementation, the Proponent shall ensure that all the deliverables described in the proposal documents have been approved and accepted by the City's Project Manager;

d) Training and Issues support is in place to aid the business in the implementation process;

e) Implementation support;

f) Conduct a walkthrough of the solution User Guide and all Training Materials with the City Project Team; and

g) Update the City Project team in a timely manner.

5.4 IMPLEMENTATION SUPPORT

5.4.1 The Proponent shall provide services for "implementation support" activities and those services shall be included in the Proponent's firm, pricing established in the cost details form of this document.

5.4.2 The Proponent shall provide support staffing during system installation through production go-live, as follows:

a) **Project Manager** – The project manager shall be required to be onsite as needed for critical times of the system's implementation to ensure better quality assurance management of the system's implementation as described in the Proponent's implementation plan. The Proponent's Project Manager must be available by telephone (6am to 6pm Pacific Time) 7 days a week during the "go-live" or transitionary period of the solution;

b) **Support Staff** – Minimum of one (1) FTE on-site, for the initial 48 hours following "go-live"; and

c) **Support Staff** – Following 48 hours after the production go live, and for a period of 30 days, a minimum of one (1) FTE on-call, Monday through Friday (6am to 6pm Pacific Time).

5.4.3 The Proponent shall complete a milestone status report for each significant implementation milestone, stating what was completed and what actions are necessary as a result of the

milestone. The City will review and formally accept each milestone report if the milestone deliverable demonstrates fulfillment of the RFP requirements.

5.5 SOLUTION ACCEPTANCE

5.5.1 Solution acceptance will occur in four (4) phases

1. **Functional Certification:** For each project phase the Proponent will certify that the Proponent's solution implementation is complete in accordance with project phase scope of work.

2. **Proof of Integration:** The proponent is responsible for ensuring that the solution is capable of integrating with the City's current suite of application integrations (including the capability to integrate via web services platform). To confirm that this has been successful, the proponent must work with City teams to ensure that bi-directional communication between the Proponent's solution and designated City's applications are fully operational

3. **Production System Documentation**: The Proponent shall deliver "as built" online or otherwise electronic and hard copy documentation, clearly describing actual implementation configurations, settings, customizations, and complete installed solution documentation.

4. **60-Day Reliability Test:** The duration for the Performance Period for Acceptance shall be sixty (60) calendar days and shall begin after:
   a) Configuration and Implementation of the solution user interface has been deployed in a Production Environment for a period of 60 calendar days;
   b) No major bugs or defects have been reported to the proponent in the implemented solution for a period of 35 days;
   c) Successful completion of User Acceptance Testing; and
   d) City users have been utilizing the application for a minimum of sixty (60) days.

Criteria for Success:
- No major defects or bugs within the solution has been reported
- Solution uptime is consistent with SLA parameters
- Support response is consistent with SLA parameters
- All functions implemented within the project phase scope of work continue to be functional

Outcome:
City's Project Manager will issue a written notice to the Proponent of either completion or failure of the 60-Day Reliability Test.

In the event that the 60-Day Reliability Test has been unsuccessful, the City Project Manager will identify the areas which were unsuccessful and collaborate with the Proponent on an acceptable solution – upon which the application will then re-enter the Performance Period for Acceptance for and repeat if necessary until successful.

5.5.2 Solution Acceptance Phase Completion

After all System Acceptance benchmarks have been achieved – the Proponent is expected to provide city staff with a Solution Acceptance Report, which documents benchmarks, significant achievements, deliverables and signoffs, for the phase of project implementation.

Upon City receipt and acceptance of the Solution Acceptance Report from the proponent – the project will enter a sustainment phase, in which all components have been installed and the solution deemed to be stable.

6. MAINTENANCE SERVICES AND LEVEL OF SUPPORT

6.1 TECHNICAL, MAINTENANCE, OPERATIONS, AND LEVEL OF SUPPORT

6.1.1 Technical Support

The Proponent must describe their process and services for providing support for the proposed solution (including technical, hardware (if provided by the Proponent), and data, reporting and billing inquiries). At a minimum, the City requires the Proponent to provide solution support that will have a maximum response time of 60 minutes 16x7 (5am – 9pm Pacific Time).

6.1.2 System Support Services

a) The Proponent must provide system maintenance (e.g., upgrades, enhancements, new releases, etc.) and technical support for all products/services in accordance with the requirements within this RFP, including ongoing unlimited technical support problem determination and resolution;

b) The Proponent shall provide recurring application maintenance for the proposed solution, for an initial five (5) years (with an option to extend the maintenance of the solution for a further term– to be reviewed on an annual basis);

c) All expected costs for such maintenance support shall be provided within the Costs table associated with this document. The proponent will also identify a maximum annual increase rate for maintenance services – which will be identified as a percentage - future maintenance cost should not exceed percentage identified within the table. All cost increases must be well documented and subject to negotiations;

d) The Proponent must provide for any upgrades to the system components to accommodate and maintain the solution customizations developed within the scope of the project phases (or contracted with the proponent in a change request). Updated solution documentation must be provided to the City concurrent with installation of any upgrade or revision to the system, unless otherwise agreed to by the City;

e) For a cloud-hosted solution, the Proponent must fully test and resolve any solution deficiency on upgrades prior to installing/implementing the upgrades into production;

f) The Proponent must ensure that upgrades may be rolled-back. There must be a back-out strategy if an upgrade fails. In performing the regression testing on a new version/upgrade of the solution, the Proponent must certify in writing to the City that all the previous (old) solution capabilities still work in accordance with the contract requirements;

g) Maintenance services shall include, at a minimum, the detection and correction of solution errors discovered by the City or otherwise made known to the Proponent. The Proponent agrees to respond to the City's inquiries regarding the use and functionality of the solution as issues are encountered by system users;

h) For a cloud-based solution, System Maintenance shall also include all services necessary to maintain at least a 99.9% solution operational uptime, redundancy, and recovery services described herein for all products provided by the Proponent, as well as the resolution of system errors, malfunctions, and system restoration. Scheduled downtime for maintenance or upgrades shall not be included in the calculation of system production uptime;

i) The Proponent will describe their ability and approach to updating the solution, and configuration settings; and

j) If investigation and research is required by the Proponent's technical staff, and the problem cannot be resolved or question answered immediately, then the Proponent's help desk/technical support staff should notify City representatives within two (2) hours and produce a report progress on the problem's resolution (in electronic format) to City personnel. The Proponent must continue to update City staff on progress of the problem's resolution.

6.1.3 **Maintenance Log**

The Proponent shall keep a log of all maintenance/technical support calls made to the Proponent's Help Desk/technical support personnel and document the complaints and problems reported to the help desk system whether made either by a City resource, or by the Proponent. The log shall be made available to the City as part of monthly or quarterly reporting, as well as any other time upon request by the City. This report(s) shall be delivered to or made available to the City no later than by the end of business (5:00 p.m. Pacific Time) on the fifth calendar day of every month. The log must at a minimum contain the following information:

a) Time of incident notification;

b) Name of City resource;

c) Ticket Number;

d) Description of Reported Problem/Complaint;

e) Indication of whether the problem/compliant was resolved at time of call;

f) Description of any follow-up investigation/resolution plans;

g) Date of and Description of Final Resolution;

6.1.4 **Level of Support**

a) The Proponent shall provide support services for the proposed Solution. The services proposed by the Proponent must include, but are not limited to, the following issues:

- Escalation Procedures: The Proponent shall provide a copy of the Proponent's trouble escalation procedures as well as describe the process and procedures that would be utilized by City personnel when issues require escalation. The Proponent must maintain this information with correct and current data during the course of the maintenance period;
- Installation, Verification and Validation: The Proponent is required to provide support during testing phases of new releases of the application;
- Application Defects: The Proponent is required to provide resolution to all confirmed application defects within 30 days or a negotiated time period;
- Upgrade Support: The Proponent must offer, for the full term of the maintenance agreement, support of the proposed solution to ensure continued operation during and after upgrades and implementation of new releases of all user interface applications covered under the maintenance agreement;
- Enhancements: The Proponent must provide enhancement updates to the user interface applications as they become available or as requested by the City. Please describe the method of distributing information on the available updates and software modifications with an explanation of the responsibilities of the Proponent and the City.

b) Through solution support, the Proponent ensures that the solution shall remain compatible with the current and future City operating system software (Windows 7+), web browser (IE 11+ and Chrome) or any third party software used in direct association by the proponent with the developed solution;

c) Solution support includes updates and modifications as required as a matter of federal, provincial or municipal law and or regulation in connection with City's compliance standards; and

d) The Proponent shall comply with City Change Management Process for testing and implementing solution related changes into the production environment. This process consists of thorough solution testing in the Development/Testing Environment. Following testing and acceptance, the system may be loaded into the Production Environment

7. SECURITY REQUIREMENTS

7.1 PROPONENT SECURITY REQUIREMENTS

7.1.1 The integrity and security of the data communications are fundamental components of all applications procured by the City and, accordingly, the City has implemented security processes and procedures that foster and safeguard the data integrity within all its applications.

7.1.2 Short-listed Proponents must complete and submit a Security and Cloud (if applicable) Hosting Questionnaire, Privacy Impact Assessment, and provide a written statement describing the extent to which they will be able to comply with City Information Technology security policies and procedures stated in 7.1.3 – 7.1.9, regarding access to the City's networks and physical facilities, if they are selected as the successful Proponent;

7.1.3 Authorized Proponent staff may require secured remote access privileges into the configuration; City IT staff reserves the right to monitor all remote access activities;

7.1.4 The Proponent shall comply with, and adhere to, all relevant City Policies and Standards. These policies may be revised from time to time and the Proponent shall comply with all such revisions. Current and revised versions of the security policy will be made available to the Proponent, following contract award;

7.1.5 The Proponent shall complete all required paperwork for security access if access is needed to the City's Information Technology LAN/WAN, as directed and coordinated with the Project Manager;

7.1.6 Any Proponent employee authorized to perform services under the contract, who will be in and out of City facilities on a daily basis, must participate in a City security awareness, occupational health & safety orientation and training session; and

7.1.7 At all times, at any City facility, the Proponent's personnel shall ensure cooperation with City site requirements to include being prepared to be escorted at all times, and providing information for obtaining a badge and wearing the badge in a visible location at all times.

7.1.8 The integrity and security of the data storage (when being collected, in transit and within the application) is of paramount importance to the City, and as such, the Proponent and the Solution must adhere to industry best practices in terms of data encryption, data transmission and data management.

8. SUBMISSION FORMAT

Table 5 Expected Submission Format of the Proposal

Section Number	Section Title	Proposal Content Reference Details
		Title Page
		Table of Contents
1.0	PROPONENT OVERVIEW	Provide concise written narrative responding to <u>each</u> of the following in Section 10.0 Proponent Overview: • Section 10.1 – Executive Summary • Section 10.2 – Understanding of Solution being sought by City • Section 10.3 – Proponent's Experience, Expertise and References • Section 10.5 – Value-Added Services • Section 10.6 – Proposed Alternatives
2.0	DETAILED FUNCTIONAL REQUIREMENTS SPREADSHEET	Complete Annex 2 – Detailed Functional Requirements spreadsheet: • 1.0 Overall Solution • 2.0 Global • 3.0 Core Platform • 4.0 Incident Management • 5.0 Change Management • 6.0 Service Request Management • 7.0 Service Catalog • 8.0 Knowledge Management • 9.0 Problem Management • 10.0 Self Service • 11.0 Workflow Automation • 12.0 Asset Management / CMDB • 13.0 Service Level Management • 14.0 Mobile App
3.0	DETAILED TECHNICAL REQUIREMENTS SPREADSHEET	Complete Annex 3- Detailed Technical Requirements spreadsheet: • 1.0 IT Architecture • 2.0 IT Standards • 3.0 Support • 4.0 Mobile Devices • 5.0 Integration • 6.0 Data Management • 7.0 Cloud Option

4.0	SCENARIOS	Provide written narrative addressing each scenario in: Annex 4 – Scenarios A-E • A. Major Outage (Citywide & VPD) • B. Simple workflow for a Business Unit • C. New item in the Service Catalog • D. Change Request Lifecycle • E. Field Service Technician (Mobile Solution) • Out-of-the-box Implementation
5.0	CLOUD QUESTIONNAIRE	If applicable, complete Appendix 15 - Cloud Computing Questionnaire
6.0	COMMERCIAL PROPOSAL	Complete RFP Part C – Form of Proposal, Appendix 3 – Commercial Proposal
7.0	KEY PERSONNEL & PROPONENT'S REFERENCES	Refer to this Annex 1 – Schedule of Requirements, Section 4.0 – Project Management and Solution Delivery Services, Sub-section 4.5 - Proponent's Key Personnel. The Proponent shall provide names, titles, roles and responsibilities of each proposed key personnel for execution of the project (e.g. implementation team, sustainment team). The Proponent shall limit key personnel resumes to a maximum of two (2) pages per person. Complete RFP Part C – Form of Proposal, Appendix 4 – Proponent's References.
8.0	SUBCONTRACTORS	Complete RFP Part C – Form of Proposal, Appendix 10 – Subcontractors
9.0	PROJECT IMPLEMENTATION PLAN AND SCHEDULE	Refer to Annex 1 – Schedule of Requirements, Section 4.0 Project Management and Solution Delivery Services, Sub-section 4.2 Project Implementation Plan and Schedule – Details. Also refer to Table 4 – Deliverable Timetable. For clarity, Proponent shall provide a draft Project Implementation Plan and Schedule , inclusive of a completed Table 4 – Deliverable Timetable, based on the City's requirements for the Platform Solution. A more detailed Project Implementation Plan and Schedule will be required upon written notice of contract award.

10.0	SUSTAINABILITY	Complete RFP Part C – Form of Proposal: • Appendix 7 – Corporate Sustainability Leadership Questionnaire; and • Appendix 8 – Sustainability Requirements Questionnaire
11.0	DEVIATIONS AND VARIATIONS	Complete RFP Part C – Form of Proposal, Appendix 11 – Proposed Amendments to Form of Agreement, if any. If none, state that the Proposal is fully consistent with the Form of Agreement.
12.0	CONFLICTS; COLLUSION; LOBBYING	Complete RFP Part C – Form of Proposal, Appendix 14 – Conflicts; Collusion; Lobbying.
13.0	INSURANCE	Complete RFP Part C – Form of Proposal, Appendix 5 – Certificate of Insurance, and, if applicable, attach Proof of WorkSafeBC Registration (refer to Part C – Form of Proposal, Appendix 13).
14.0	PROPOSAL FORM	Complete and execute RFP Part C – Form of Proposal, Appendix 1 – Legal Terms and Conditions of RFP.
15.0	DECLARATION OF SUPPLIER CODE OF CONDUCT COMPLIANCE	Complete and execute RFP Part C – Form of Proposal, Appendix 6 – Declaration of Supplier Code of Conduct Compliance form.
16.0	PERSONAL INFORMATION CONSENT FORM(S)	Complete and execute RFP Part C – Form of Proposal, Appendix 9 – Personal Information Consent Form(s).
17.0	FINANCIAL STATEMENTS	As required in RFP Part C – Form of Proposal, Appendix 12 – Financial Statements, attach Proponent's Financial Statements for at least the prior two years.

9. PROPOSAL EVALUATION

The evaluation process is expected to be conducted in two Phases:

1. Phase 1: Evaluation of Proposals, with the objective of short-listing Proponents to Phase 2
2. Phase 2: Evaluation of Short-listed Proponents on the following:
   a) A Demonstration of the proposed Solution, as presented in the Proposal;
   b) City's review of Cloud Computing Questionnaire (if applicable);
   c) A completed Privacy Impact Assessment; and
   d) Written responses to Proposal Clarification Questions (if any) from the City.

On-site demonstration of the Solution:

Short-listed Proponents shall present on-site demonstrations of their proposed Solution which addresses the functional and technical capabilities articulated in their Proposals, and as stated in the RFP Requirements. The demonstrations should help to clarify characteristics or significant elements related to the Proposals, or the Proponents' field-tested/demonstrated systems. The demonstrations should adhere to business functionality scenarios (e.g. Annex 4 – Scenarios A-E), and allow the Proponent to highlight value-added features of the proposed Solution. It is anticipated that all demonstrations will be conducted and recorded remotely using web meeting technology (e.g. Web Ex).

Proponents should submit written copies of any material that will be presented during the demonstration (e.g. copies of a Power Point presentation, MS-Word, Visio, etc.).

Proponent's Team:
Short-listed Proponents attending the on-site demonstration should include, at a minimum, the following members of the proposed Key Personnel: project manager; and senior resources who will be executing the proposed implementation plan.

Refer to Part A – Section 8.0 of the RFP for additional details on the City's evaluation process.

10. PROPONENT OVERVIEW

10.1 EXECUTIVE SUMMARY

The Proponent should provide an Executive Summary that provides the City Evaluation Committee and City Management with a collective understanding of the contents of the entire Proposal.

The Executive Summary should briefly summarize the strengths of the Proponent and their subcontractors, and the key features of the Proponent's proposed approach to meet the requirements of the RFP by phase/milestone. The Executive Summary will include highlights of the following:

1. Products and service capabilities;
2. Significant features of the Proponent's services approach;
3. Previous relevant experience; and
4. Financial stability.

The Executive Summary Section should be limited to a maximum of four (4) pages in length.

10.2 UNDERSTANDING OF SOLUTION BEING SOUGHT BY CITY

The Proponent should present their understanding of the problems being addressed by this RFP, the objectives, and the intended results. Proponent should summarize how their proposal meets the requirements of this RFP and why the Proponent is best qualified to perform the work required. The Understanding of Solution Section should be no more than four (4) pages in length.

10.3 PROPONENT'S EXPERIENCE, EXPERTISE AND REFERENCES

Proponents and their subcontractors should clearly describe at least three (3) previous project experiences of a similar nature and complexity in scope, as well as the responsibility and technologies involved. These project summaries should be limited to no more than two pages per project, and should include no more than five (5) project summaries. Contact names and information (e.g. email address, telephone number) must be provided, to allow the City to perform reference checks.

The Proponent should also describe the subcontractors' (if subcontractors are proposed) experience in providing the products/services that they will be responsible for providing as part of the Proponent's system solution. Project Summaries for the subcontractors should be limited to no more than two pages per project, and should be limited to three (3) project summaries. Contact names and information (e.g. email address, telephone number) must be provided, to allow the City to perform reference checks.
In providing this information, the Proponent should take into consideration the following areas of interest to the evaluators:

- The quality and relevance of references;
- Demonstration of extensive project management expertise utilizing and adhering to industry-accepted project management methodologies and best practices (e.g., PMI) on previous projects;

- Demonstration of successfully analyzing/understanding the business needs of the customer, offering appropriate solutions to meet/exceed those needs, and extensive experience in designing/configuring a system solution to fulfill the business needs of the customer;

- The ability to successfully implement the solution, as demonstrated by implementation of comparable solutions; and

- Demonstration of extensive experience with projects related to the integration of the proposed solution with other applications, and demonstration of completing a project within the timeframe established by the project schedule.

The City may contact references to validate information. Proponent and Subcontractors should either have satisfactorily completed, or be completing the qualifying projects, as verified by the references.

10.4 TECHNICAL AND FUNCTIONAL REQUIREMENTS

10.4.1 In order for the City to evaluate the Proponent's system solution's technical and functional capabilities, the Proponent's responses to the requirements stated in Annex 2 – Detailed Functional Requirements spreadsheet, Annex 3 – Detailed Technical Requirements spreadsheet, and Annex 4 – Scenarios A-E should contain sufficient and relevant details. Comments columns in Annex 2 and Annex 3 are provided for Proponents to enter details of their response. Annex 4 contains space for Proponents to enter their responses to each Scenario.

10.4.2 The Proponent should take into consideration the following areas of interest to the evaluators:

a) The ability of the user interface to increase/streamline access to information;

b) The stated architecture goals and needs as identified within this document; and

c) The ability of the proposed solution to support:

- Critical functionality;

- The Desired and Optional functionality;

- Flexibility and capability to add new features, connections and/or data sources in the future;

- The design, capability, and functionality of the proposed technical solution of the Proponent's solution response to this RFP;

- The solution provider's methodology and capability to ensure the least amount of business disruption during implementation.

10.5 VALUE-ADDED SERVICES

Proponents are encouraged to provide descriptions of any additional value-added services that are not already referenced by the RFP, Annexes, and Appendices.

Any value-added services should be presented as optional components which the City may choose, at the City's sole and absolute discretion, and at no additional cost to the City. Details of any value-added services should be included in RFP Part C, Appendix 3 – Commercial Proposal, under the 'Other Items' section of the pricing table. In addition, Proponents should provide a comprehensive description of their approach to value-added services in Annex 2 – Detailed Functional Requirements spreadsheet, as applicable.

If Proponents can offer optional modules at additional cost to the City, all associated pricing should be included in RFP Part C, Appendix 3 – Commercial Proposal, under the 'Optional modules' section of the pricing table.

Proponents should identify and propose any other elements necessary to successfully execute the project: tasks and deliverables that are important to the success of the project should be articulated in the Proposal, with all associated costs itemized and detailed.

10.6 PROPOSED ALTERNATIVES

Alternate proposals may be considered by the City. The alternate proposal must address all of the requirements stated in the RFP, and the Commercial Proposal (RFP Part C – Form of Proposal, Appendix 3) must contain all pricing information in the pricing table format provided.

11. PROPONENTS FORM OF AGREEMENT

11.1 LICENCE, ANNUAL SOFTWARE MAINTENANCE AND SUPPORT AGREEMENTS

The Proponent may provide, for the City's review, a copy of their standard:

a) Solution License Agreement(s);

b) Maintenance and Support Agreement;

c) Escrow Agreement;

d) Statement of Work; and

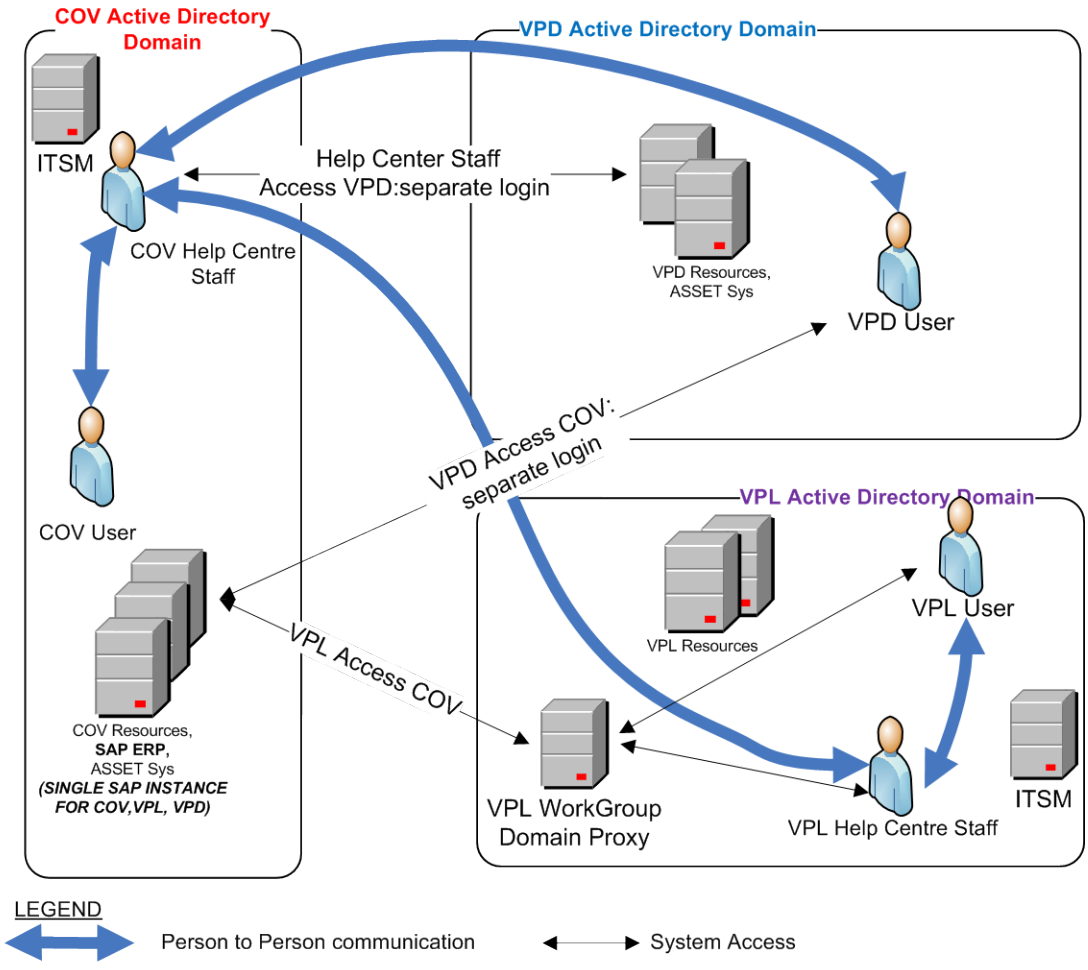
e) Service Level Agreement.

The City may review and consider the Proponent's terms and conditions; however, the City intends to execute the City's Supply Agreement in the form included in the RFP.

OVERVIEW OF CITY OF VANCOUVER (COV), VPL AND VPD ACTIVE DIRECTORY STRUCTURE

Key Infrastructure Points

- **VPL, VPD and COV have their own separated Active Directory Domains.**
    - **Users in each domain may have multiple logins to access other domains**
- **There is one SAP ERP system shared by COV, VPL and VPD**
- **There are 2 service desks – COV (which provides services to VPD) and VPL**
- **There are two Asset Management Systems – COV (houses VPL assets) and VPD**



Access and Authorization:

VPL to COV

The connection between the VPL AD domain and COV is two way or read/write. This connection is facilitated by a Workgroup server that acts as a proxy between the two domains. This removes the need for duplicate VPL AD IDs in the COV domain.

VPD to COV

The Connection between the VPD AD domain and COV is one way - read write by VPD only. Duplicate IDs are needed to be maintained so VPD members can login to the COV domain.

VPD's independent security domain has no proxy or Workgroup server or other means of connecting to COV, so duplicate IDs with separate passwords are needed for VPD personnel trying to access COV resources such as VanDocs.