



Farm Credit Canada
Financement agricole Canada

Canada

Request for Qualifications
for
Information Technology (IT) Outsourcing Services

RFQ#	20100929
Issue date:	September 29 th , 2010
Submission Deadline	October 14th, 2010 2:00 pm , Regina, Saskatchewan Local Time (Mountain Daylight Time).
Submission Address	Farm Credit Canada Box 4320 1800 Hamilton Street Regina SK, S4P 4L3
Contact Person for inquiries:	Brian McCusker, Director, IT Shared Services Phone: 306-780-8489; Email: Brian.McCusker@fcc-fac.ca

This is a request for qualifications (RFQ) only. Farm Credit Canada is not obligated nor is Farm Credit Canada to be construed as obligated to proceed further. Farm Credit Canada may at its sole discretion elect not to accept any submission for any reason.

NOTICE

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1. Introduction

1.1. Introduction

This Request for Qualification (RFQ) is an open invitation to interested parties to submit their qualifications for delivering selected IT services to Farm Credit Canada. Respondents' submissions in response to this RFQ shall be referred to as the "Prequalification Submission."

- i. This Request for Qualification ("RFQ") is issued by Farm Credit Canada (the "Client").
- ii. This RFQ is not a tender or request for proposal (RFP) and is not an offer by the Client to enter into a contract of any kind whatsoever and is not intended to create a binding contract. A summary of the RFQ process is contained in Appendix A – RFQ Data Sheet.
- iii. The purpose of this Request for Qualifications (RFQ) is to solicit information from the Respondents on how they can meet the Client's requirements for selected IT Outsourcing Services (the "Services").
- iv. The scope of the Services is summarized in Section 1.5 and Appendix B – Scope of Services.
- v. This RFQ requires each Respondent to submit the information described in Appendix C and to submit the forms contained in the Forms attached to this RFQ.
- vi. The procurement process in respect of the Services will be managed by the Client. It is anticipated that as a result of this RFQ, one or more Respondents will be invited to respond to an RFP that the Client may issue later.
- vii. Respondents are strongly encouraged to examine this RFQ in its entirety. Submissions must follow the format specified in the RFQ. Failure to do so may result in disqualification of the Respondent from any further participation in this procurement process.

1.2. Farm Credit Canada

Farm Credit Canada (FCC or the "Client") is a financially self-sustaining Federal Crown corporation reporting to Parliament through the Minister of Agriculture and Agri-Food. Established in 1959, FCC is Canada's leading provider of agricultural financing and business solutions.

As Canada's largest provider of business and financial services to farms and agribusiness, FCC advances the business of Agriculture. Operating out of 100 offices located primarily in rural Canada with our head office in Regina, FCC's 1,560 employees are passionate about the business of agriculture. A healthy portfolio of more than \$20 billion and 17 consecutive years of portfolio growth are a reflection of our customers' success.

1.2.1. Vision

FCC's vision is to be *"a visionary leader and trusted partner in finance and management services tailored to agriculture – leveraging our people's specialized knowledge and passion to create an extraordinary customer experience."*

1.2.2. Mission

FCC's mission is *"to enhance rural Canada by providing business and financial solutions to farm families and agribusiness"*.

Additional information about FCC can be found at <http://www.fcc-fac.ca/>.

1.3. IT Organization Overview

The key groups within FCC's IT organization include:

- *Business Platform Management*: Manage IT demand and relationships with business units
- *Enterprise Architecture*: Develop overall technology direction for IT and ensure compliance with standards and policies
- *Solution Delivery*: Develop, customize and support in-house and packaged applications, including project delivery and business analysis
- *Application Support*: Tier 2 application support, application and database administration
- *Quality Assurance* : Quality management and quality control activities
- *Infrastructure Management*: System software, disaster recovery servers, storage and network management
- *IT Customer Service*: Help desk and desk side support services
- *IT Shared Services*: Vendor Management, Project Management Office, procurement, asset management, resource capacity management, financial management and telecom support to IT

FCC's IT infrastructure is presently fully outsourced to ISM, a wholly owned subsidiary of IBM Canada Ltd. In addition, the Client uses external staff in the Solution Delivery, Application Support and Quality Assurance groups.

1.4. Background & Objectives

As FCC strives to meet the changing needs of its customers across Canada, the IT organization is committed to support the organization's overall objectives.

IT outsourcing has been identified as one option to help achieve these priorities. Consequently, FCC is issuing this RFQ to prequalify providers who will then be invited to participate in an RFP process to determine FCC's outsourcing partner(s) for delivering selected IT services.

Specifically, the selected partner(s) will be expected to enable and support the following objectives:

Enable Scalability

FCC requires an outsourcing partner that can assist in managing peaks and valleys in demand for IT services. The Client will close an IT transformation with implementation of a core banking solution in 2011, but demand for IT services is expected to remain strong over the next several years across various technology platforms.

Cost Optimization

FCC expects to optimize the cost of IT service delivery through the use of external service providers.

Access to Specialized Expertise

FCC requires an outsourcing partner that can provide access to specialized skills and help mitigate risk related to the availability of such skills.

Improve Quality of Service

FCC places a high priority on consistent delivery of high quality service. FCC expects to further improve consistency in quality of service by implementing industry best practices including processes from external service providers.

1.5. Scope of services

The scope of services is anticipated to be organized into service bundles as outlined below.

- IT Operations Services, including :
 - data centre operations
 - server and storage management
 - desktop Engineering
 - management of Integrated Test Environment (ITE)
- Data and Voice Network management, including:
 - VOIP
 - LAN/WAN
 - Unified Messaging, including E-mail
 - Tele- and video-conferencing
 - Voice mailbox administration, etc.

The complete scope of Services is described in detail in Appendix B

2. RFQ GUIDELINES

2.1. Eligible Respondents

Interested parties may include individuals, corporations, joint ventures, partnerships, or any other entities or combinations thereof. Responding parties (the "Respondent") must clearly disclose whether they are responding alone or in combination with others. If the submission is on behalf of two or more entities, the submission shall clearly indicate who the Client should deal with (the "Respondent Representative"). The Respondent Representative shall be deemed to have the power and authority to bind all members of the Respondent group. The other members of the Respondent group must also be identified (the "Team Members").

2.2. Obtaining the RFQ

RFQ documents should be obtained directly from the MERX electronic tendering system (1-800-964-6379; www.merx.com, merx@merx.com) ("MERX") to ensure that they receive all RFQ-related communications from FCC.

If the Respondent obtains this RFQ in some way other than through MERX, the Respondent is solely responsible to ensure that it has received all communications issued by the Client and a failure to obtain any such communication is at the sole and absolute risk of the Respondent.

2.3. RFQ Contact Person and Submission Instructions

2.3.1. Contact Person

Responses and any questions regarding this RFQ must be sent to the following Contact Person:

Brian McCusker
Director, IT Shared Services
Tel: 306-780-8489;
Email: Brian.McCusker@fcc-fac.ca

Except where expressly provided in this RFQ, any contact with FCC employees or advisors (including Deloitte & Touche and MacPherson, Leslie & Tyerman) regarding the procurement process described in this RFQ is strictly prohibited. Failure to comply may lead to the Respondent's exclusion from this procurement process.

2.3.2. Submission Instructions

Respondents shall prepare, and the Client will accept, all Prequalification Submissions in either English or French. The Client will not accept a Prequalified Submission in any language other than English or French.

Respondents must submit:

- one (1) printed and bound copy marked "Original";
- ten (10) printed and bound copies; and
- one (1) electronic copy in Microsoft Word and/or PDF format

Prequalification Submissions must be received by the Contact Person by 2:00 p.m. (Mountain Daylight Time) on 14 October 2010 (the "Submission Deadline").

Responses must follow the format outlined in Appendix C –RFQ Requirements & Submission Format. Respondents must adhere to the overall page limit, as well as the page limit specified for each section and are strongly encouraged not to include any promotional material in their submission.

Respondents may withdraw or modify their Prequalification Submission at any time prior to the Submission Deadline. If a Respondent wishes to modify its submissions, it must first withdraw the original response and completely replace it with a new response prior to the Submission Deadline.

2.4. RFQ Questions, Clarifications and Amendments

- i. All questions related to this RFQ should be submitted in writing via e-mail to the Contact Person. The subject line of the e-mail should state: **Questions Re: RFQ# 20100929**. All questions should be submitted before the deadline indicated in Appendix A – RFQ Data Sheet.
- ii. Questions submitted to anyone else by any means other than by e-mail will not be reviewed or answered; and any responses received from anyone other than that received in writing from the Contact Person cannot be relied upon for the purposes of this RFQ.
- iii. At FCC's sole discretion, answers to all questions submitted to the Contact Person may be consolidated and provided to all Respondents via the MERX system without identifying the originator.
- iv. Any oral or written response provided by the Client or its employees, consultants or financial or legal advisors or anyone else designated by the Client (the Representatives") in connection with this RFQ will neither be binding on the Client nor will it change, modify, amend or waive the requirements of this RFQ in any way. Any oral or written response with respect to this RFQ cannot be relied upon unless it is issued via the MERX system as a numbered Addendum to the RFQ.
- v. FCC, in its sole discretion, may modify this RFQ in whole or in part and notify Respondents of such modifications via MERX.

3. Procurement & Evaluation Process

3.1. Procurement Process

This procurement is anticipated to be a three stage process, as described below:

Stage 1 – Request for Qualifications (Prequalification)

The RFQ or Prequalification Stage is intended to identify a short list of prequalified parties that will be eligible to participate in the subsequent RFP process.

This stage is a standalone one and any subsequent stages will be at the Client's sole discretion.

Stage 2 – Request for Proposals (RFP)

If the Client chooses to proceed with an RFP, it will be a competitive procurement process and will be intended to result in the identification of one or more parties with which the Client will enter into a Master Services Agreement for the delivery of the Services.

Stage 3 – Selection of Successful Proponent(s) and Execution of Master Services Agreement

Once the Successful Proponent(s) has been selected, FCC will proceed to execute a Master Services Agreement with such proponent(s).

Please refer to Appendix A – RFQ Data Sheet for a schedule of events related to this Stage 1.

3.2. RFQ Evaluation Process and Criteria

3.2.1 Evaluation Process

The Client and its Representatives will evaluate all Prequalification Submissions as follows:

Step 1

Each Prequalification Submission will be reviewed to determine whether it is substantially complete. The "substantial completeness" review will assess whether the required information and forms have been substantially provided in the Prequalification Submission. A Respondent's failure to provide a substantially complete Prequalification Submission will result in the Prequalification Submission not being evaluated.

Step 2

Each Prequalification Submission that has passed the substantial completeness review will be assessed on the mandatory criteria as defined in Section 3.2.2.1. A Respondent's failure to meet the mandatory criteria will result in the elimination of the Respondent's Prequalification Submission from further evaluation.

Step 3

The Client will review and score the Prequalification Submission from each Respondent based in the rated criteria as defined in Section 3.2.2.2.

Step 4

The evaluation team will then shortlist Respondents based on the scores resulting from Step 2 of the evaluation process. The shortlisted Respondents will be prequalified for the RFP process.

Step 5

Subject to Section 3.2.1.1 and following approval by the Client, all Respondents will be contacted and informed whether or not they have been selected to be Prequalified Parties.

3.2.1.1. Maximum Number of Prequalified Respondents

In Step 4, above, FCC intends to prequalify a maximum of two (2) Respondents for each Service Bundle. FCC, at its sole discretion, may elect to prequalify the same two Respondents for all Service bundles, to increase the maximum number of prequalified Respondents (overall or for a specific Service Bundle) or to replace a prequalified Respondent that has informed the Client that it does not wish to participate in the RFP process by adding the next highest ranked Respondent(s) (as determined by the evaluation scoring) to the list of Prequalified Respondents, even if those Respondents were not Prequalified Respondents in the first instance.

3.2.1.2. Clarifications & Right to Verify

- i. FCC may, at its sole discretion, request clarifications in any Prequalification Submission. The evaluation of a Prequalification Submission will include any clarifications provided in writing in response to questions posed by the Client as well as any other investigations made by the Client. The Client will have the right to verify any information received, including contacting any references given by the Respondent, and, for that purpose, the Respondents shall be deemed to consent to and authorize the release of such information to the Client. If required, it may be necessary for a Respondent to attend one or more clarification meetings with the Client.
- ii. The Client is under no obligation to request clarification with respect to, or verify, any information in any Prequalification Submission, including the clarification or verification of an ambiguity in the Prequalification Submission.
- iii. The Client may, in its sole discretion, independently verify any information in any Prequalification Submissions. The Client has the right to disqualify any Respondent and to reject the Prequalification Submission of any Respondent whose Prequalification Submission contains any false or misleading information. The Client also has the right to disqualify any Respondent and/or to reject the Prequalification Submission of any Respondent which, in the Client's sole discretion, has failed to disclose any information that would, if disclosed, materially adversely affect the Client's evaluation of the relevant Respondent's Prequalification Submission. The Client is under no obligation to independently verify any information in any Prequalification Submission.

3.2.1.3. Interviews and Reference Checks

- i. FCC may, in its sole discretion, conduct interviews with the Respondents to further understand the Respondent's Prequalification Submission and to meet key members of the Respondent's team. The Client may request clarification of a Respondent's Prequalification Submission at an interview and the Client may treat these clarifications in the same fashion as clarifications provided in writing in accordance with Section 3.2.1.2. The Client is under no obligation to conduct interviews with the Respondents.
- ii. The Client may, in its sole discretion, check references provided by Respondents. The Client is under no obligation to check references provided by Respondents.

3.2.2.Evaluation Criteria

FCC shall evaluate the proposals (for the purposes of assessing which, if any, Respondents it will invite to the RFP process) based on criteria described below.

3.2.2.1. Mandatory Criteria

Respondents that pass Step 1 of the evaluation process as described in Section 3.2.1 will proceed to Step 2 and be evaluated on a set of mandatory criteria as follows:

Criterion	Weighting
Relevant Experience	50%
Financial Viability	50%

Respondents must achieve a score of at least 70% in order to be evaluated on the rated criteria (Step 3). Respondents that do not achieve a score of 70% or greater on the Mandatory Criteria will be excluded from further evaluation.

3.2.2.2. Rated Criteria

A Prequalification Submission that has passed the substantial completeness review and has met the Mandatory Criteria will be evaluated on the following Rated Criteria as follows:

Criterion	Weighting
Capabilities	10%
Fit	30%
Risk	10%
Each Service Tower	50%

4. RFQ Process Matters

4.1. Communications and Public Comment

- i. Neither Respondents, Team Members or any of their respective representatives shall,
 - a. make any public comment, respond to questions in a public forum, or carry out any activities to publicly promote or advertise their qualifications, interest in or participation in this RFQ process without the Client's prior written consent, which consent may be arbitrarily withheld or delayed; or
 - b. engage in any way whatsoever in any form of political or other lobbying to influence the outcome of this RFQ process.
- ii. In the event of any lobbying or communication by a Respondent, any Team Member or any of their respective representatives in contravention of this Section, the Client may, in its sole discretion and at any time, prohibit a prospective Respondent from submitting a Prequalification Submission or reject the Prequalification Submission submitted by that Respondent in this RFQ process, without further consideration. The Client may, as an alternative to the rejection of a Prequalification Submission impose such conditions on that Respondent's continued participation in the RFQ process and any subsequent procurement process as the Client, in its sole discretion, may consider in the public interest or otherwise appropriate.
- iii. Other than as expressly permitted or required in this RFQ, any attempt on the part of any Respondent to contact any of the following persons, directly or indirectly, with respect to this RFQ, may lead to disqualification of an Respondent or rejection of a Prequalification Submission:
 - a. any Representative of the Client, other than the Contact Person;
 - b. any member of an evaluation team or the evaluation committee;
 - c. any expert or advisor assisting the Client, an evaluation team or the evaluation committee;
 - d. any other additional party named in the RFQ Data Sheet.

4.2. Examination and Interpretation of Documents

Each Respondent is responsible for ensuring that it has all of the information necessary to respond to this RFQ and for independently informing and satisfying itself with respect to the information contained in this RFQ, and any conditions that may in any way affect its Prequalification Submission.

- i. This RFQ may not contain all of the information that a Respondent may need in deciding whether to submit a Prequalification Submission.
- ii. The Client and their Representatives shall not be liable for any information or advice or any errors or omissions that may be contained in this RFQ or the Addenda, appendices, data, materials or documents (electronic or otherwise) attached or provided to the Respondents pursuant to this RFQ.
- iii. The Client and their Representatives make no representations or warranties, and there are no representations, warranties or conditions, either express or implied, statutory or otherwise, in fact or in law, with respect to the accuracy or completeness of this RFQ or such Addenda, appendices, data, materials or documents and the Client and their Representatives will not be responsible for any claim, action, cost, loss, damage or liability whatsoever arising from any Respondent's reliance on or use of this RFQ or any other technical or historical addenda, appendices, data, materials or documents provided, delivered or made available by the Client or their Representatives.

- iv. Each Respondent is responsible for obtaining its own independent financial, legal and technical and professional advice with respect to the RFQ, and any Addenda, appendices, data, materials or documents provided, delivered or made available or required by the Client.

4.3. Costs & Expenses of Respondents

- i. The cost associated with developing Respondents' submissions and any subsequent meetings, presentations, and other activities shall be borne solely by the Respondent and shall not be reimbursable by FCC.
- ii. Neither the Client nor their Representatives will be liable to pay any costs or expenses of any Respondent or prospective Respondent or to reimburse or compensate a Respondent or prospective Respondent in any manner whatsoever under any circumstances, including in the event of the rejection of any or all Prequalification Submissions or if the Client decides not to proceed with the procurement process.

4.4. Client's Rights

It is FCC's intent to proceed to an RFP process with the prequalified parties. However, the Client expressly reserves the right to do any one or more of the following:

- i. cancel or re-issue the same or a different RFQ at any time;
- ii. accept all or part of any Prequalification Submission;
- iii. accept a non-compliant Prequalification Submission;
- iv. not proceed to an RFP stage with any of the Respondents;
- v. waive any irregularities, omissions or errors in any Prequalification Submission;
- vi. to disqualify any Respondent that does not meet the requirements of this RFQ, including for a contravention of any prohibition or requirement that is set out in this RFQ in respect of the conduct of Respondents or their respective representatives;
- vii. amend or modify the scope of the Services to be performed;
- viii. proceed, in the Client's sole discretion, to perform the Services in such other manner as the Client may elect.

In each case, the Client will not be liable for any costs or damages incurred by any Respondent.

4.5. Restriction on Communication between Respondents

A Respondent shall not discuss or communicate, directly or indirectly, with any other Respondent, any information whatsoever regarding the preparation of its own Prequalification Submission or the Prequalification Submission of the other Respondent in a fashion that would lessen the competitiveness of the bidding process.

4.6. Conflict of Interest and Ineligible Persons

- i. Each Respondent and Team Member must declare and continue to be under an obligation to declare all Conflicts of Interest or any situation that may be reasonably perceived as a Conflict of Interest that exists now or may exist in the future. For the purposes of this RFQ "Conflict of Interest" includes any situation or circumstance where in relation to the RFQ, the Respondent or Team Member has other commitments, relationships or financial interests that,
 - a. could or could be seen to exercise an improper influence over the objective, unbiased and impartial exercise of the Client's independent judgment; or
 - b. could or could be seen to compromise, impair or be incompatible with the effective performance of its obligations under the Master Services Agreement that may ultimately be entered into.

4.7. Use of Confidential Information

- i. Each Respondent must declare and continue to be under an obligation to declare that it does not have knowledge of or the ability to avail itself of confidential information of the Client relevant to the scope of services where the Client has not specifically authorized such use.

4.8. Access to Information

- i. Respondents are advised that the Client may be required to disclose the RFQ documents and a part or parts of any Prequalification Submission pursuant to the *Access to Information Act (Canada)*

4.9. Legal Matters

This RFQ is not an offer to enter into any contract of any kind whatsoever. This RFQ is not intended to create a bidding contract.

4.10. Interpretation

In this RFQ, words in the singular include the plural and vice-versa and words in one gender include all genders, all references to dollar amounts are to the lawful currency of Canada, and the words "include", "includes" or "including" means "include without limitation", "includes without limitation" and "including without limitation", respectively, and the words following "include", "includes" or "including" will not be considered to set forth an exhaustive list.

Appendix A – RFQ Data Sheet

	Description / Reference
Client	Farm Credit Canada
Contact Person	Brian McCusker Director, IT Shared Services Tel: 306-780-8489; Email: Brian.McCusker@fcc-fac.ca
Submission Address	1800 Hamilton Street, P.O. Box 4320, Regina Saskatchewan S4P 4L3, Attn: Brian McCusker, Director, IT Shared Services The Client's office hours are Monday to Friday from (7:30 a.m. to 5:00 p.m. Regina, SK local time).
Scope of Services	Appendix B – Scope of Services
RFQ Requirements and Submission Format	Appendix C – RFQ Requirements and Submission Format
Key Dates (Subject to Change)	
Deadline for submission of questions and requests for clarification by Respondents	October 5 th , 2010 12:00:00 Noon, Regina Saskatchewan Local Time (MDT)
RFQ Submission Deadline	October 14 th , 2010 2:00:00 pm, Regina Saskatchewan Local Time. (MDT)
Notify Prequalified Parties	October 27 th , 2010
Issue RFP	November 2010 (TBD)

Appendix B – Scope of Services

The description below is not meant to be exhaustive but is intended to provide examples of the types of Services that may be in scope for the RFP process.

IT Operations Services Bundle

Security

- Develop and manage IT security controls that mitigate risks associated with managed infrastructure (e.g. storage and servers)
 - risk identification,
 - control definition and execution
 - monitoring and enforcement
- Provide identity and access management operations for managed infrastructure

Service Management

- Develop and manage service management processes for both infrastructure and applications
- Implement a new service management tool or enhance the existing tool to support integrated service management processes

Application and Database Administration

- Management of Integrated Test Environment (ITE), including platform administration, database administration, deployment of code, refresh of test environments, scheduling of the test environment between projects or initiatives, managing availability of the following technologies:
 - Middleware (such as WebLogic, Netweaver and IIS) PeopleSoft
 - Documentum/Captiva
 - Web-based Applications

Systems Management for Commercial Off the Shelf (COTS) application (such as Cognos, Planview and Moody's Risk Analyst)

- Ensure availability, capacity, change, performance, recovery and configuration management across the infrastructure environment (i.e. servers and storage)

Server Management

- Level 1, 2 and 3 support for hardware and systems software
- Hardware and systems software management (maintenance, upgrades, bug fixing and patches)
- Production schedule control, monitoring and scheduling
- IMAC services for network hardware and servers (i.e. desktops and laptop IMAC service remains in-sourced)

Storage Management

Tape and Backup and Recovery Management

Remote Server Management

File Services Management

Disaster Recovery Management

- Disaster recovery service level (24 hour minimum)

Desktop Engineering

- Engineer and test desktop images
- Remote desktop image problem management and resolution
- Desktop evergreening (continuous refresh) services

Management of IT Tools

The following IT tools are expected to be in the scope of the RFP:

- HP Openview tools, including Radia, HP Asset Manager, Service Manager, OVIS, UCMDB
- HP Quality Assurance and testing tools
- Adobe Server Platform

Data & Voice Network Services Bundle

Network Operations

- Management of Wide Area Network (WAN) that includes sites across Canada
- Quality of Service monitoring
- Network Health and Performance Reporting
- Maintaining network certifications and protocols, including incident management processes
- Boundary protection services (e.g. firewall, intrusion prevention)
 - On site network security
 - Network device access controls
 - Support for encrypted connections on internal LAN and external WAN
- Maintaining data privacy and confidentiality;
- Major incident management (such as a new virus, spam attack etc.)
- Network security auditing

Unified Communications

- Integration of real time communication services such as Enterprise Instant Messaging, Video Conferencing, VOIP , Enterprise Telephony, Mobile Applications and non-real time communication services such as unified messaging (Email, Voice Mail etc.)
- Hosting and management of Microsoft Exchange Services
- Hosting and management of Microsoft Office Communications Server (OCS)
- Management of Microsoft SharePoint as collaboration platform
- Voicemail services

Telecom Administration, including:

- Internal co-ordination with FCC staff to provide mobile and landline services
- External co-ordination with telecom companies to set up new accounts or make changes to existing accounts
- Operations, support, maintenance and provisioning of minor IMACs for Tele and Video Conferencing Services
- Voice Network
 - Provisioning, support and maintenance of the voice network
 - Provisioning access to external vendors/contractors
 - Break/fix support
- Management of Blackberry Enterprise Server (BES)

Appendix C –RFQ Requirements & Submission Format

Based on the information provided in this document and the attachments, Respondents are requested to provide the following information in a written document not exceeding 31 pages (required attachments such as financial statements and copies of HR policies are not included in this page limit). Proposals are to be structured as described below and should specifically address the information requirements noted within each section. In providing responses, please clearly state any assumptions and do not include any marketing or sales material.

1.0 Executive Summary (maximum 2 pages)

The Executive Summary will provide a brief description of the proposed solution, clearly indicating how the submission addresses the major components of the business requirements. The summary is not to exceed 2 pages. In addition, the Executive Summary should summarize the key components of the solution.

2.0 Respondent Profile & Approach (maximum 3 pages)

- i. For each Respondent party and Team Member, provide the following information:
 - a. Company overview and history
 - b. Details of services currently offered to clients in Regina and other parts of Saskatchewan
 - c. Details on your work environment (i.e. unionized, non-unionized). If unionized, please provide details on the name of the union(s) and current contract(s) validity date(s).
 - d. Details of your commitment to socially responsible business practices, and more specifically, the environment.
- ii. Approach to delivering the services, including
 - a. Partnerships
 - b. Description of overall solution

3.0 Relevant Experience (maximum 2 pages)

The Respondent must provide evidence of experience in delivering similar outsourcing services as described in Appendix B – Scope of Services within the last 5 years to organizations with 1,500 employees or greater, preferably in the financial services industry.

Please use the table format below for your references.

Reference #1	
Client Name	
Contact Person and Contact Information	
Client Size (# of employees, annual revenue)	
Client Location	
Contract Start and End Dates	
Description of Services Provided (including delivery location(s))	

Reference #2	
Client Name	
Contact Person and Contact Information	
Client Size (# of employees, annual revenue)	
Client Location	
Contract Start and End Dates	
Description of Services Provided (including	

delivery location(s))	
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Reference #3	
Client Name	
Contact Person and Contact Information	
Client Size (# of employees, annual revenue)	
Client Location	
Contract Start and End Dates	
Description of Services Provided (including delivery location(s))	

4.0 Financial Viability (Maximum 1 Page)

- i. The Respondent must provide a brief description of its financial position, including:
 - a. Number of years in business;
 - b. Total revenue and net income for the last 3 years;
 - c. Total revenue and net income from IT outsourcing services; and
 - d. Other relevant information.

Please provide copies of audited financial statements for the last 3 years.

5.0 Capabilities (maximum 10 pages)

5.1 Attracting and Retaining Talented Employees

This section should contain the following information:

- i. A brief profile of your employees, including
 - a. Average turnover rate; and
 - b. Average tenure of employees.
- ii. Summary of your HR policies related to:
 - a. Recruiting top talent;
 - b. Training and development; and
 - c. Rewards and retention.

Please provide extracts of relevant HR policies to support the above.

5.2 Global Delivery Capabilities

This section should contain information about the Respondent's service delivery centers (with specific reference to centres that will be used to support FCC) including:

- i. Centres of excellence and their locations;
- ii. Number of resources at each location and their focus areas; and
- iii. Ability to support 24x7 operations.

5.3 IT Operations Services Capabilities

This section should contain the following information:

- i. Details of the Respondent's data centre or centres in Canada that would be used to host FCC infrastructure, including:
 - a. Tier classification;
 - b. Respectively, anticipated network latency for users located in Regina, British Columbia and Nova Scotia;
 - c. Location(s);
 - d. Capacity (total and available);
 - e. Backup data centre; and
 - f. Ownership.
- ii. The respondent should provide information about its capabilities and experience in providing desktop imaging and ever-greening (continuous refresh) services.
- iii. The respondent should provide information about its experience in management of Integrated Test Environments (ITE) including platform administration, database administration, deployment of code, test environment scheduling and refresh

The respondent should also provide information on its capabilities in supporting the following technologies:

- a. Middleware (such as WebLogic, Netweaver and IIS)
 - b. PeopleSoft
 - c. Documentum/Captiva
 - d. Web-based applications
- iv. The respondent should provide information about its capabilities related to managed infrastructure security, specifically:
 - a. Risk identification,
 - b. Control definition and execution
 - c. Monitoring and enforcement
 - d. Identity and Access Management
 - v. The respondent should provide information about its capabilities in developing and managing integrated service management processes.

5.4 Data and Voice Network Services Capabilities

The respondent should provide information about its Network Operations Centre(s) that would be used to support FCC, including for each centre:

- i. Description of network management operations, including:
 - a. Management of Wide Area Network (WAN) that includes sites across Canada
 - b. Quality of Service monitoring
 - c. Network certifications and protocols in place, including incident management processes
 - d. Approach to leveraging new technologies and/or industry trends to optimize the network infrastructure. Provide examples of any such enhancements and associated benefits.
 - e. Boundary protection services (e.g. firewall, intrusion prevention)
 - f. Description of network security capabilities:

- i. On site network security
 - ii. Network device access controls
 - iii. Support for encrypted connections on internal LAN and external WAN
 - g. Processes and protections to ensure data privacy and confidentiality;
 - h. Process to manage major incidents that impact multiple organizations (such as a new virus, spam attack etc.)
 - i. Types and frequency of network security audits and key findings of last 3 audits;
 - j. Major partners and suppliers;
 - k. Number of customers using this service;
 - l. Routing respondents used to interface with customers.
- ii. Description of Unified Communication capabilities, including:

The respondent should provide information about its capability and experience providing Unified Communications (UC) services, including:

- a. Integration of real time communication services such as Enterprise Instant Messaging, Video Conferencing, VOIP , Enterprise Telephony, Mobile Applications and non-real time communication services such as unified messaging (Email, Voice Mail etc.)
 - b. At least three client examples demonstrating experience in implementing / supporting Unified Communications
 - c. Blackberry Enterprise Server (BES)
- iii. Respondent should demonstrate capabilities in minimum conditions for network management operations, which would include:
- Microsoft Office Communications Server (OCS)
 - Microsoft Exchange as email platform
 - Microsoft SharePoint as collaboration platform

6.0 Fit with FCC (maximum 10 pages)

6.1 Customer Focus

This section should contain information to support the Respondent's focus on customers.

- i. Using a minimum of 2 examples, provide evidence of:
 - a. Going beyond contractual obligations to help customers achieve their corporate objectives;
 - b. Helping clients improve their revenue and profitability;
 - c. Optimizing value for customers by helping them reduce costs and improve efficiency. Please provide details, including initiatives undertaken, percentage of improvement achieved and timing;
 - d. Measurably improving and sustaining customer satisfaction over the course of a contractual agreement lasting 3 or more years; and
 - e. Commitment to building and sustaining a true partnership with customers (including high levels of satisfaction for both the client and service provider teams).
- ii. Please provide an explanation of where FCC fits within Respondent's overall customer and market strategy and why the Respondent is interested in FCC as a potential client.

6.2 Market Focus

This section should contain a description of Respondent's:

- i. Industry leadership and innovation in areas related to the applicable scope of Services;
- ii. Competitive market pricing;
- iii. Market strategy with respect to Regina and Saskatchewan.

6.3 Operational Excellence

This section should contain a description of the Respondent's:

- i. Continuous improvement programs undertaken in the last 3 years and results achieved;
- ii. Overall employee satisfaction scores as determined by annual surveys for the last 3 years;
- iii. Deployment of ITIL (indicate status of deployments within delivery centres proposed for FCC);
- iv. Approach to root-cause analysis;
- v. Approach to and processes for working with other service providers in a multi-sourced environment;
- vi. Approach to proactive monitoring and resolution of issues;
- vii. Other information demonstrating operational excellence.

7.0 Risk Profile (maximum 2 pages)

7.1 Delivery Locations

This section should contain a description of Respondent's service delivery location(s) including internal ranking of proposed locations compared to Respondent's other delivery locations.

7.2 Certifications

This section should contain a description of Respondent's industry standard technical and security certifications for the proposed delivery location(s).

7.3 Litigation

This section should contain a description of Respondent's client disputes within the last three (3) years that have led to litigation.

8.0 Additional Information (maximum 1 page)

Respondents are requested to identify any additional technical documents or information that would be useful in preparing a response to an RFP for the defined scope of services. Note that this is a voluntary section and will not be evaluated.

Appendix D – RFQ Submission Checklist

This checklist is provided for information purposes only. It is the exclusive responsibility of each Respondent to submit a complete Prequalification Submission in accordance with this RFQ.

Section Reference		
Required Forms		
Section 1.0	RFP Submission Form	Yes / No

Forms

RFQ Submission Form

Name of Respondent:	
Name of Respondent Representative or Participant in Charge:	
Address:	
City / Province / Postal Code:	
Respondent Representative/Participant in Charge Contact Name(s) and Titles:	
Telephone:	
Alternate Telephone:	E-mail:

The above named Respondent Representative or Participant in Charge hereby declares on its own behalf and on behalf of the Respondent that:

- i. it has the power and authority to bind the Respondent for the purpose of the Request for Qualifications (the "RFQ") in respect of IT Outsourcing Services issued September 29st, 2010 and acknowledges that all terms not otherwise defined herein shall have the meaning given to them in the RFQ;
- ii. the Respondent agrees to comply with and be bound by the requirements, terms and conditions contained in the RFQ;
- iii. the Respondent acknowledges its obligations regarding Confidential Information contained in Section 4.7 of the RFQ and agrees to be, and to use reasonable efforts to cause its representatives, potential team members and Team Members to be, bound by such terms, irrespective of whether the Respondent, is invited to submit or submit a proposal in the subsequent Request for Proposals process for the Project;
- iv. the information submitted in the Prequalification Submission or otherwise related to this RFQ is accurate;
- v. the information required by the RFQ has been substantially provided in the Prequalification Submission;
- vi. the Respondent recognizes that the information submitted will be treated as confidential and will be used only to establish qualifications to submit a proposal in the subsequent Request for Proposals for the Project;
- vii. the Respondent agrees that the information submitted may be clarified, verified and investigated and that pertinent information may be obtained and hereby consent to such clarification, verification and investigation;
- viii. the Respondent agrees that the Client is not obliged, in any way whatsoever, to carry out further clarifications, verifications or investigations of any Prequalification Submission;
- ix. the Respondent understands that any omission or failure to substantially comply with a requirement included in the RFQ may result in the Prequalification Submission being disqualified;
- x. the Respondent understands that the RFQ is not an offer to enter into any contract of any kind whatsoever and is not intended to create a bidding contract;
- xi. the Respondent understands that the RFQ does not constitute any offer of work by the Client; and
- xii. this Form has not been modified in any manner, except to include the Respondent's required information.

In witness whereof, the Respondent Representative has executed this Form as of the date indicated below.

Date: _____

Respondent Representative

Per:

Name:

Request for Qualifications #20100929
Information Technology Outsourcing Services

Title:

Per:

Name:

Title:

I/We have authority to bind the Respondent.

RFQ Intent to Submit Form

Please complete this form and email it to the individual Contact Person below no later than the Submission date noted in section 2.3.2 of the Request for Qualifications

Brian McCusker
Director, IT Shared Services
Email: Brian.McCusker@fcc-fac.ca

1. We intend to respond to the RFQ by the closing date ():
- We will be submitting a response alone
 - We will be submitting a response jointly with others

The following is a list of the organizations contributing to our response, all of whom are prepared to sign a Confidentiality Agreement.

- 1. _____
- 2. _____
- 3. _____

2. We intend to submit a response for the following service bundles (opportunities):
- IT Operations
 - Data and Voice Network Services

We will not be responding to this RFQ, for the reason(s) indicated below.

3. Respondent's Contact information:

Respondent Representative Name	
Respondent Representative Title	
Respondent Representative Email	
Respondent Representative Telephone	
Respondent Representative Fax	
Respondent Name	

Respondent Signature _____ Date: _____