

**REQUEST FOR SUPPLIER  
QUALIFICATION  
FOR  
IT Professional Services Roster**

**For the Department of Finance**

<b>Request for Proposal Number:</b>	5354
<b>Date Issued:</b>	August 23, 2019
<b>Submission Deadline:</b>	September 20, 2019

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## PART 1 – INVITATION AND SUBMISSION INSTRUCTIONS

### 1.1 Invitation to Proponents

This Request for Supplier Qualifications (“RFSQ”) is an invitation by the Province of Prince Edward Island (“the Province”) to IT Professional Service suppliers to provide information about their capabilities and qualifications, with the intention of creating the IT Professional Services Roster.

The development of the Roster is Stage I of a two-staged approach. Stage II is the use of the IT Professional Services Roster for subsequent competitive processes and awarding of IT services contracts. Stage II begins with issuance of a Statement of Work and ends with the award of contract to the successful supplier(s) from the Roster for the discrete work projects.

IT Shared Services will manage and administer the RFSQ process. The IT service contracts may include high-level project management, business analysis, organizational change management, infrastructure and other project related expertise. The IT service contract could include IT operational initiatives such as upgrades to existing systems, evaluation of new technology, maintenance on existing systems, and other IT related work where internal resources do not have the necessary skills or workload capacity.

Proponents will need to prequalify by Service Category for discrete work projects within the scope of that Service Category. The service categories are:

1. Project Management Services\*
2. Business Analyst Services
3. Analysis/Programming Services
4. IT Management Consulting\*
5. IT Enterprise Architecture Services\*
6. IT Emergency Management, Business Continuity Management, and Disaster Recovery Services
7. IT Security Systems and Infrastructure Services
8. IT Network Services
9. IT Server Services
10. IT End User Support Services
11. Business Intelligence Services
12. IT Security Audit and Policy Services
13. Cerner Command Language (CCL)
14. Mobile Environment Support
15. Lean Six Sigma Mentorship/Training\*
16. Change Management\*
17. Digital Government Services
18. Telecommunications
19. Health IT Consulting Services

“\*” Only Intermediate and Senior consultants will be considered for these categories. ITSS considers the following years of experience per Level: Junior 0-3 years, Intermediate 4-7 years, and Senior >7 years.

Descriptions of these categories are in **Appendix I – Service Categories**.

Use of the IT Professional Services Roster is not mandatory by IT Shared Services, if it so chooses, it will follow the guidelines in **Appendix C – IT Professional Services Roster Framework** and those qualified suppliers on the list will be provided further notices of the procurement opportunities per the guidelines. IT Shared Services may issue an open RFP at its discretion. Statements of work under this RFP may vary from less than \$50,000 to a maximum of \$250,000.

Each Successful Proponent will be required to execute a professional services agreement and SOW with IT Shared Services at the time services are required. Prior to any services being performed an agreement to the terms and conditions by signing the contract is required. Disqualification from the IT Professional Service Roster may occur in the event a Prequalified Proponent fails to execute this form of services agreement.

## 1.2 RFSQ Contacts

For the purposes of this procurement process, the “RFSQ Contacts” shall be:

**Colin Beaton**  
**Manager of Business Infrastructure Support**  
**Email: crbeaton@gov.pe.ca**

**Melanie Barlow**  
**Procurement Officer**  
**Email: mcbarlow@gov.pe.ca**

Proponents and their representatives are not permitted to contact any employees, officers, agents, elected or appointed officials or other representatives of the Province, other than the RFSQ Contacts or their designate, concerning this RFSQ. Failure to adhere to this rule may result in the disqualification of the Proponent and the rejection of the Proponent’s proposal.

## 1.3 Type of Contract for Deliverables

The initial term of the Roster will be for a period of **three (3) year(s)**.

Proponents can qualify at any time during the contract using the framework in Appendix C.

Proponents are encouraged to respond to this initial posting to maximize the opportunity; however, as detailed in Section 3.1.10, there is no guarantee that any minimum purchase volumes will be reached through this standing offer.

## 1.4 RFSQ Timetable

Issue Date of RFSQ	23 August 2019
Deadline for Questions	11 September 2019
Deadline for Issuing Addenda	16 September 2019
<b>Submission Deadline</b>	<b>20 September 2019 at 2:00 pm Atlantic Time</b>
Anticipated Notification of Pre-qualification Status	31 October 2019

The RFSQ timetable is tentative only, and may be changed by the Province at any time.

## **1.5 Submission of Proposals**

### **1.5.1 Proposals to be submitted at the Prescribed Location**

Proposals must be submitted at:

#### **PROCUREMENT SERVICES**

95 Rochford Street  
2<sup>nd</sup> Floor South, Shaw Building,  
PO Box 2000, Charlottetown, PE, C1A 7N8

### **1.5.2 Proposals to be submitted on Time**

Proposals must be submitted at the location set out above on or before the Submission Deadline as indicated in section 1.4. The Proponent is solely responsible for the delivery of its proposal to the exact location (including floor, if applicable) indicated in this RFSQ on or before the Submission Deadline. The Province does not accept any responsibility for proposals delivered to any other location by the Proponent or its delivery agents. Proposals submitted after the Submission Deadline will be rejected. The Province's time clock will be deemed to be correct.

### **1.5.3 Proposals to be submitted in Prescribed Format**

In a sealed package, Proponents should submit their proposal containing **two (2)** hard copies of their proposal and **one (1)** electronic copy saved as a Portable Document Format (PDF) on a USB flash drive, unless otherwise indicated. The file name on the electronic copy should include an abbreviated form of the Proponent's name and RFP #. If there is a conflict or inconsistency between the hard copy and the electronic copy of the proposal, the hard copy of the proposal shall prevail. In the interest of environmental sustainability, please refrain from using binders, binding, plastic covers, or similar fastening or presentation materials when submitting the proposal. Similarly, unless specifically requested in this solicitation document, Proponents should not submit product catalogues, swatches, or other marketing materials with their bid. Sealed packages should be prominently marked with:

- the RFSQ title and RFP number (see RFSQ cover)
- the full legal name and return address of the Proponent

The Province will not accept proposals submitted by **facsimile transfer, email, or any other electronic means**.

### **1.5.4 Amendment of Proposals Prior to Submission Deadline**

Proponents may amend their proposals prior to the Submission Deadline by submitting the amendment in a sealed package prominently marked with the RFSQ title and RFP number and the full legal name and return address of the Proponent to the location set out in section 1.5.1 Any amendment must clearly indicate which part of the proposal the amendment is intended to amend or replace. Any amendments received after the Submission Deadline will not be accepted. Amendment must be signed by the person who signed the original proposal submission or by a person authorized to sign on his or her behalf.

### **1.5.5 Withdrawal of Proposals**

Proponents may withdraw their proposals prior to the Submission Deadline. To withdraw a proposal, a notice of withdrawal must be received by the RFSQ Contact prior to the Submission Deadline and must be signed by an authorized representative of the Proponent. The Province is under no obligation to return withdrawn proposals.

**1.5.6 Proposals Irrevocable after Submission Deadline**

Proposals shall be irrevocable for a period of **Ninety (90)** days from the Submission Deadline.

[End of Part 1]

## PART 2 – EVALUATION OF PROPOSALS

### 2.1 Stages of Evaluation

The evaluation of responses will be done in the following manner:

- a. Evaluation of responses for the administrative requirements listed in “Mandatory Submission Requirements”.
- b. Evaluate experience level using Corporate Overview and Project Summaries.
- c. Contact the project references using a standard list of questions.

### 2.2 Stage I – Mandatory Submission Requirements

Stage I will consist of a review to determine which proposals comply with all of the Mandatory Submission requirements. Proposals that do not comply with all of the Mandatory Submission requirements as of the Submission Deadline will be disqualified and not evaluated further.

**The Mandatory Submission Requirements are as follows:**

#### 2.2.1 No Amendment to Forms

Other than inserting the information requested on the mandatory submission forms set out in the RFSQ, a Proponent may not make any changes to any of the forms. Any proposal containing any such changes, whether on the face of the form or elsewhere in the proposal, will be disqualified.

#### 2.2.2 Submission Form (Appendix B)

Each proposal must include a completed **Submission Form (Appendix B)** signed by an authorized representative of the Proponent.

#### 2.2.4 Declaration of Contract Intentions (Appendix H)

Each proposal must include a completed **Declaration of Contract Intentions (Appendix H)**.

#### 2.2.5 Corporate Overview, Project Profile and Reference (Appendix J)

Each proposal must include a completed **Corporate Overview, Project Profile, and Reference (Appendix J)**.

### 2.3 Stage II – Rated Criteria

The Province will evaluate each compliant proposal on the rated criteria as set out in the **RFSQ Particulars (Appendix D)**. The following is an overview of the rated categories and weighting for the rated criteria of the RFSQ. Proponents must meet or exceed the minimum threshold in each category as identified in the table:

Rated Criteria Category	Weighting (Points)	Minimum Threshold
Corporate Overview	10 points	7 points
Project Summaries	45 points	30 points
Project References	45 points	30 points
<b>Total Points</b>	<b>100 points</b>	<b>67 points</b>



## **2.4 Selection of Proponents**

All proponents meeting the minimum threshold scores will be added to the IT Professional Services Roster under the appropriate Service Category. A proponent can be on the Roster under more than one Service Category.

## **2.5 Notification to Proponents**

Once the IT Professional Services Roster is finalized, the Proponents will be notified in accordance with the Terms and Conditions of the RFSQ Process (Part 3).

[End of Part 2]

## PART 3 – TERMS AND CONDITIONS OF THE RFSQ PROCESS

### 3.1 General Information and Instructions

#### 3.1.1 RFSQ Incorporated into Proposal

All of the provisions of this RFSQ are deemed to be accepted by each Proponent and incorporated into each Proponent's proposal. A Proponent who submits conditions, options, variations or contingent statements inconsistent with the terms set out in this RFSQ either as part of its proposal or after receiving notice of selection, will be disqualified; with the exception of terms described in **Appendix A – Agreement** and the associated **Declaration of Contract Intentions** process described in **section 4.5 and Appendix H**.

#### 3.1.2 Proponents not to change terminology

Changes to the terminology of this RFSQ are prohibited

#### 3.1.3 Proponents to Follow Instructions

Proponents should structure their proposals in accordance with the instructions in this RFSQ. Where information is requested in this RFSQ, any response made in a proposal should reference the applicable section numbers of this RFSQ.

#### 3.1.4 Language

All proposals are to be in English, or both English and French. If there is a conflict or inconsistency between the English version and the French version of the proposal, the English version of the proposal shall prevail.

#### 3.1.5 No Incorporation by Reference

The entire content of the Proponent's proposal should be submitted in a fixed form, and the content of websites or other external documents referred to in the Proponent's proposal but not attached will not be considered to form part of its proposal.

#### 3.1.6 References and Past Performance

In the evaluation process, the Province may include information provided by the Proponent's references and may also consider the Proponent's past performance or conduct on previous contracts with the Province.

#### 3.1.7 Information in RFSQ Only an Estimate

The Province makes no representation, warranty or guarantee as to the accuracy of the information contained in this RFSQ, received from the RFSQ contact or issued by way of addenda. Any quantities shown or data, or opinion contained in this RFSQ or provided by way of addenda are estimates only and are for the sole purpose of indicating to Proponents the general scale and scope of the Deliverables. It is the Proponent's responsibility to obtain all the information necessary to prepare a proposal in response to this RFSQ.

#### 3.1.8 Proponents to Bear Their Own Costs

The Proponent shall bear all costs associated with or incurred in the preparation and presentation of its proposal, including, if applicable, costs incurred for interviews, presentations or demonstrations.

### **3.1.9 Proposal to be retained by the Province**

The Province will not return the proposal or any accompanying documentation submitted by a Proponent.

### **3.1.10 No Guarantee of Volume of Work or Exclusivity**

The Province makes no guarantee of the value or volume of work to be assigned to any Proponents on the IT Professional Services Roster. Inclusion under a Service Category will not be an exclusive contract for the provision of the services described in the Deliverables. The Province may contract with others for goods and services the same as, or similar, to the Deliverables or may obtain such goods and services from resources within the Province.

## **3.2 Business Registration**

Proponents may be required to be registered to carry on business in accordance with applicable laws. For information on the business registration requirements of the Consumer, Corporate and Financial Services, Department of Justice and Public Safety, please consult:

<https://www.princeedwardisland.ca/en/topic/business-name-registration>

The status of a Proponent's business registration does not preclude the submission of a proposal in response to this RFSQ. A proposal can be accepted for evaluation, regardless of (i) whether the company is registered, or (ii) whether its business registration is in good standing. However, if the Proponent is selected as the successful Proponent, that Proponent must bring itself into compliance prior to the execution of the Agreement.

## **3.3 Communication after Issuance of RFSQ**

### **3.3.1 Proponents to Review RFSQ**

Proponents shall promptly examine all of the documents comprising this RFSQ, and report any errors, omissions, or ambiguities; and direct questions or seek additional information in writing by email to the RFSQ Contact on or before the Deadline for Questions. No such communications are to be directed to anyone other than the RFSQ Contact. The Province is under no obligation to provide additional information, and the Province will not be responsible for any information provided by or obtained from any source other than the RFSQ Contact. It is the responsibility of the Proponent to seek clarification from the RFSQ Contact on any matter it considers to be unclear. The Province will not be responsible for any misunderstanding on the part of the Proponent concerning this RFSQ or its process.

### **3.3.2 All New Information to Proponents by Way of Addenda**

This RFSQ may be amended only by addendum in accordance with this section. If the Province, for any reason, determines that it is necessary to provide additional information relating to this RFSQ, such information will be communicated by addendum on the **Prince Edward Island Tendering Site**. Each addendum forms an integral part of this RFSQ and may contain important information, including significant changes to this RFSQ. Proponents are responsible for obtaining all addenda issued by the Province and will be deemed to have read all posted addenda.

### **3.3.3 Post-Deadline Addenda and Extension of Submission Deadline**

If the Province determines that it is necessary to issue an addendum after the Deadline for Issuing Addenda, the Province may extend the Submission Deadline for a reasonable period of time.

### **3.3.4 Verify and Clarify**

During the evaluation process, the Province may request further information from the Proponent or third parties in order to verify or clarify the information provided in the Proponent's proposal, including but not limited to clarification with respect to whether a proposal meets the mandatory technical requirements set out in the **RFSQ Particulars (Appendix D)**. The Province may revisit and re-evaluate the Proponent's response or ranking on the basis of any such information.

## **3.4 Execution of Agreement, Notification and Debriefing**

### **3.4.1 Selection of Proponent and Execution of Agreement**

The Province will notify the Proponents in writing. The successful Proponents will be added to the IT Professional Services Roster. Execution of the Agreement will be done when Proponents are successful on a Statement of Work opportunity.

### **3.4.2 Failure to Enter into Agreement**

In addition to all of the Province's other remedies, if a selected Proponent fails to satisfy any applicable conditions within fifteen (15) days of notice of selection, the Province may, in its sole and absolute discretion and without incurring any liability, withdraw the selection of that Proponent from the IT Professional Services Roster.

### **3.4.3 Notification of Outcome of Procurement Process**

Once a Roster is finalized by the Province, a copy will be kept by Procurement and a copy will be posted internally on the IT Shared Services site.

### **3.4.4 Debriefing**

Proponents may request a debriefing after notification of the outcome of the procurement process. All requests must be in writing to the RFSQ Contact and must be made within sixty (60) days of notification of the outcome of the procurement process. The intent of the debriefing information session is to aid the Proponent in presenting a better proposal in subsequent procurement opportunities. Any debriefing provided is not for the purpose of providing an opportunity to challenge the procurement process or its outcome.

## **3.5 Conflict of Interest and Prohibited Conduct**

### **3.5.1 Conflict of Interest**

The Province may disqualify a Proponent for any conduct, situation or circumstance, determined by the Province, in its sole and absolute discretion, to constitute a Conflict of Interest. For the purposes of this Section, "Conflict of Interest" has the meaning ascribed to it in the **Submission Form (Appendix B)**.

### **3.5.2 Disqualification for Prohibited Conduct**

The Province may disqualify a Proponent, or terminate an agreement entered into if the Province, in its sole and absolute discretion, determines that the Proponent has engaged in any conduct prohibited by this RFSQ.

### **3.5.3 Prohibited Proponent Communications**

A Proponent shall not engage in any communications that could constitute a Conflict of Interest and must take note of the Conflict of Interest declaration set out in the **Submission Form (Appendix B)**.

### **3.5.4 Proponent not to Communicate with Media**

A Proponent may not at any time directly, or indirectly, communicate with the media in relation to this RFSQ or any agreement entered into pursuant to this RFSQ without consent of the Province, and then only in coordination with the Province.

### **3.5.5 No Lobbying**

A Proponent shall not, in relation to this RFSQ or the evaluation and selection process, engage directly or indirectly in any form of political or other lobbying whatsoever to influence the selection of the successful Proponent.

### **3.5.6 Illegal or Unethical Conduct**

Proponents shall not engage in any illegal business practices, including without limitation activities such as bid-rigging, price-fixing, bribery, fraud, coercion or collusion. Proponents shall not engage in any unethical conduct, including lobbying, as described above, or other inappropriate communications; offering gifts to any employees, officers, agents, elected or appointed officials or other representatives of the Province; submitting proposals containing misrepresentations or other misleading or inaccurate information; or any other conduct that compromises or may be seen to compromise the competitive process provided for in this RFSQ.

### **3.5.7 Rejection of Proposals**

The Province may reject a proponent based on past performance or based on inappropriate conduct, including but not limited to the following:

- (a) illegal or unethical conduct as described above;
- (b) the refusal of the Proponent to honour its submitted pricing or other commitments;
- (c) any conduct, situation or circumstance determined by the Province, in its sole and absolute discretion, to have constituted an undisclosed Conflict of Interest;
- (d) the Province's past experience with the Proponent within the 18 month period prior to the Submission Deadline for similar or related services; or
- (e) any information provided to the Province by any references of the Proponent, pursuant to either section 3.1.6 or section 3.7.1(e) of this RFSQ.

## **3.6 Confidential Information**

### **3.6.1 Confidential Information of the Province**

All information provided by or obtained from the Province in any form in connection with this RFSQ either before or after the issuance of this RFSQ

- (a) is the sole property of the Province and must be treated as confidential;
- (b) is not to be used for any purpose other than replying to this RFSQ and related solicitations for work as identified in the Deliverables;
- (c) must not be disclosed without prior written authorization from the Province; and
- (d) must be returned by the Proponent to the Province immediately upon request of the Province

### **3.6.2 Confidential Information of Proponent**

A Proponent should identify any information in its proposal or any accompanying documentation supplied in confidence for which confidentiality is to be maintained by the Province. The confidentiality of such information will be maintained by the Province, except as otherwise required by law or by order of a court or tribunal. Proponents are advised that their proposals will, as necessary, be disclosed, on a confidential basis, to advisers retained by the Province to advise or assist with the RFSQ process, including the evaluation of proposals.

Proponents are also advised that all documents forming part of the RFSQ process, including all submitted proposals, are subject to the *Freedom of Information and Protection of Privacy Act* R.S.P.E.I. 1988, Cap. F-15.01 (“FOIPP”). A copy of FOIPP is available online at:

<https://www.princeedwardisland.ca/sites/default/files/legislation/F-15-01-Freedom%20of%20Information%20and%20Protection%20of%20Privacy%20Act.pdf>

### **3.6.3 Personal Information**

The *Freedom of Information and Protection of Privacy Act* R.S.P.E.I. 1988, Cap. F-15.01 (“FOIPP”) governs the collection, use and disclosure of personal information by the Province and its service providers. The successful Proponents shall be required to comply with all requirements of FOIPP during the term of the Agreement.

A copy of FOIPP is available online at:

<https://www.princeedwardisland.ca/sites/default/files/legislation/F-15-01-Freedom%20of%20Information%20and%20Protection%20of%20Privacy%20Act.pdf>

## **3.7 Reserved Rights, Limitation of Liability and Governing Law**

### **3.7.1 Reserved Rights of the Province**

The Province reserves the right to:

- (a) make public the names of any or all Proponents;
- (b) request written clarification in relation to a Proponent’s proposal;
- (c) waive minor formalities that do not constitute Mandatory Submission requirements or Mandatory Technical requirements;
- (d) verify with any Proponent or with a third party any information set out in a proposal;
- (e) check references other than those provided by any Proponent;
- (f) disqualify any Proponent whose proposal contains misrepresentations or any other inaccurate or misleading information;
- (g) disqualify any Proponent or the proposal of any Proponent who has engaged in conduct prohibited by this RFSQ;
- (h) amend this RFSQ process without liability at any time prior to the execution of a written agreement between the Province and a Proponent. These changes are issued by way of addendum in the manner set out in this RFSQ;

- (i) cancel this RFSQ process without liability at any time prior to the execution of a written agreement between the Province and a Proponent. A cancellation is communicated by way of addendum in the manner set out in this RFSQ. The Province may in its sole discretion issue a new RFSQ for the same or similar Deliverables; or
- (j) reject any or all proposals.

These reserved rights are in addition to any other express rights or any other rights that may be implied in the circumstances, or that the Province has at law.

### **3.7.2 Limitation of Liability**

By submitting a proposal, each Proponent agrees that:

- (a) neither the Province nor any of its employees, officers, agents, elected or appointed officials, advisors or representatives will be liable, under any circumstances, for any claim arising out of this proposal process including but not limited to costs of preparation of the proposal, loss of profits, loss of opportunity or for any other claim; and
- (b) the Proponent waives any claim for any compensation of any kind whatsoever, including claims for costs of preparation of the proposal, loss of profit or loss of opportunity by reason of the Province's decision to not accept the proposal submitted by the Proponent, to enter into an agreement with any other Proponent or to cancel this proposal process, and the Proponent shall be deemed to have agreed to waive such right or claim.

### **3.7.3 Governing Law and Interpretation**

These terms and conditions of the RFSQ Process (Part 3):

- (a) are intended to be interpreted broadly and independently (with no particular provision intended to limit the scope of any other provision);
- (b) are non-exhaustive and shall not be construed as intending to limit the pre-existing rights of the parties to engage in pre-contractual discussions in accordance with the common law governing direct commercial negotiations; and
- (c) are to be governed by and construed in accordance with the laws of the province of Prince Edward Island and the federal laws of Canada applicable therein.

### **3.8 Participation of Eligible Public Sector Entities**

By submitting a proposal in response to this RFSQ, a Proponent irrevocably undertake and agrees that if successful, and following execution of an agreement with the Province, it will make the specified goods and/or services available to any public sector entity eligible to participate in this procurement process upon request by a public sector entity seeking access to those goods and/or services, provided however, that the Proponent's obligation to allow participation by other public sector entities does not extend to circumstances in which the Proponent would have to make capital or operational expenditures specifically in order to accommodate subsequent requests for goods or services by public sector entities.

The Proponent may only provide the goods and services specified under this RFSQ to additional entities by entering into a separate agreement with the new entity which shall contain the following minimum terms:

- (a) Any agreement the successful Proponent enters into with an eligible public sector entity shall be on the same terms and conditions, including pricing and expiry date, contained in the agreement it enters into for the same goods and/or services with the Province under this RFSQ.
- (b) The Proponent and the other entity acknowledge and agree that the Province will not have any contractual or financial obligation or any other liability to either the Proponent or the other entity for any matter arising under the agreement or through the provision of goods and services specified in this RFSQ and, without limiting the foregoing, the Proponent and other entity acknowledge and agree that:
  - The Province will not be liable or responsible for any act or omission of the other entity in relation to the other entity's access to the provisions of goods or services under this RFSQ;
  - The other entity will make its own enquiries and satisfy itself as to the suitability of the Proponent or its products or services for the other entity;
  - The other entity will be responsible for obtaining its own professional advice, including its own independent legal advice, and for including any additional business and legal terms and conditions in the other entity's agreement as may be necessary and appropriate in its specific circumstances; and
  - The other entity will be responsible for its own contract administration with the Proponent and will not direct any Proponent service issues that may arise to the Province.

For the purposes of this section, a public sector entity means any provincial government or provincially funded entity in Nova Scotia, New Brunswick, Prince Edward Island, and Newfoundland and Labrador, including municipalities, universities, community colleges, school boards, health authorities, housing authorities, agencies, boards, commissions, and crown corporations.

[End of Part 3]



## PART 4 – GENERAL INFORMATION

### 4.1 Project Objectives

IT Shared Services's current list of IT Professional Services providers is expiring. The Province has found the use of prequalified IT Professional services to be a success. In an effort to encourage more IT Professional Service providers to participate, this RFSQ has changed requirements, such as:

- a. The consultant may not have to work on PEI. This will be determined on a per project basis.
- b. The \$50,000 cap on all work packages has been removed from the initial evaluation, and any financial caps will be identified on individual subsequent work packages.
- c. The identification and evaluation of fees are not required to qualify for the list. Negotiating fees will occur when responding to a statement of work requirement RFP/tender.
- d. The naming of resources is not required. This allows the Proponent to determine staff availability and suitability at the time of RFP/tender.
- e. Resumes of staff are not required. Evaluation is to qualify the Proponent by Service Categories.

### 4.2 Background

Information Technology Shared Services (ITSS) is located in the Department of Finance within the Government of Prince Edward Island. ITSS reports to the Treasury Board Secretariat. ITSS formed in 2006 to consolidate all IT resources across government within a single work unit. ITSS provides a broad range of services to Government departments and agencies.

IT Shared Services manages the operation of computer systems and infrastructure, the planning, development and implementation of new information technology initiatives, and the coordination of IT and Information Management for the Province of PEI.

**Appendix F – IT Shared Services Organization Chart** illustrates the key responsibilities of each of these sections.

### 4.3 IT Shared Services Environment

GPEI / IT Shared Services (ITSS) supports approximately:

- 32,000 users
- 330 site
- 1000 servers
  - 610 virtual servers, 40 VMWare vSphere ESXi host servers, 350 discreet servers
  - Server hardware is primarily HP, but includes Dell, IBM, and SUN servers
    - Servers are primarily Blade and Rack mounted with only a few tower servers
    - VMWare is on HP C7000 Blade Enclosures and BL460C Blade servers
  - Server operating systems include:
    - Windows, Solaris, SUSE Linux Enterprise Server (SLES), Red Hat Enterprise Linux (RHEL), and multiple other variations of Linux.

- Services provided include:
  - SQL, Oracle, DB2, & MySQL databases,
  - GroupWise email system,
  - file, print, application and web servers,
  - Oracle financials & PeopleSoft,
  - McAfee antivirus and other management tools.
- 3 primary Data Centres
  - Provincial Administration Building (PAB) in Charlottetown,
  - Queen Elizabeth Hospital (QEH) in Charlottetown and,
  - Prince County Hospital (PCH) in Summerside,
  - Standalone servers at 37 other sites across the province
- Multiple storage arrays/storage area networks:
  - QEH - EMC<sup>2</sup> VNX5400, EMC<sup>2</sup> Isilon X200, EMC<sup>2</sup> Data Domain4500;
  - PAB - EMC<sup>2</sup> VNX5400, EMC<sup>2</sup> Isilon X200, EMC<sup>2</sup> Data Domain4500;
  - PCH - EMC<sup>2</sup> VNX5400, EMC<sup>2</sup> Isilon X200;
  - Brocade switches for SAN connectivity (2 to 16 GB)
- VMware vSphere Enterprise Plus ESXi 5.2 and 5.5, vCenter 5.5, vSphere Standard ESXi 5.5, vRealize 5.5.
- Cisco switches for LAN connectivity (1 to 10 GB)
- Cisco and Motorola point-to-point wireless access points or Fiber for WAN connectivity (2 MB to 10 GB)
- 4 Active Directory (AD) Domains.
- 3 distinct networks for Health, Education, and Core Government. These networks are comprised of Microsoft, Novell and Unix file server environments with Microsoft Windows 10 / 7/XP desktop clients.
- Hosts and Maintains over 600 Business Applications. Some key applications include: PeopleSoft HR, Oracle Financials, CA Unicenter, Novell GroupWise, Novell NDPS and iPrint, Microsoft Active Directory, Microsoft Office 2010/2016 Suite.
- Supports Health for example: Cerner Clinical Information System, AGFA PACS, Radiology Information System, Integrated Claims / Drug Information System and Dictaphone
- Supports Education systems for example: Student Achieve, Google Apps and Trevlac.
- Manages and delivers over 150 IT projects annually.
- Handles approximately 275 client service requests per day.

- Provides and manages approximately 14,000 Government GroupWise email accounts and 950 Blackberry users.
- Supports approximately 13,700 desktop computers (7,000 in Health and Core Government, 6,700 in Education) and 5,600 Chromebooks.
- Is responsible for approximately 1,450 printing devices, of which 520 are MFP/MFDs and 930 are printers (excluding schools).

See **Appendix E – Common Technologies** used by the Province of PEI.

#### 4.4 **Sample Statement of Work**

A sample of a statement of work has been included in **Appendix G**. All subsequent work opportunities will require the successful Proponent to sign a copy of a statement of work that will have a similar layout to this sample.

#### 4.5 **Declaration of Contract Intentions**

A copy of the current Professional Services contract has been included in Appendix A. All subsequent work opportunities will require the successful Proponent to sign a copy of the most current version with the Statement of Work.

The purpose of the IT Professional Services Roster is to increase the efficiency and time it takes to get an external resource working on a professional services deliverable. Eliminating changes to the Standard Professional Services Contract (Appendix A) is preferred. Proponents who will not agree to sign the Province’s standard contract as is, **will receive a penalty of up to 10%** on each subsequent Tender/Statement of Work evaluation.

IT Shared Services is looking for the Proponent to indicate the likelihood that it will require alterations. This will assist IT Shared Services in planning timelines for future work opportunities.

Proponents are not required to sign the Professional Services contract during this RFSQ. They will have the opportunity to review the most current version of the contract and to complete a new Declaration of Contract Intentions Form after considering the Tender/Statement of Work.

Proponents must indicate on the **Declaration of Contract Intentions Form (Appendix H)**, if it wishes to request alterations to the Agreement Form (Appendix A), these alterations should be identified in the Declaration and the Declaration form signed. The extent of the alterations to the Agreement Form (Appendix A) will be taken into account when issuing tenders/statement of work opportunities. The Proponent who requests what, in the sole opinion of the Province, are multiple changes or is a major change to the Agreement Form (Appendix A), will be penalized up to 10% during the evaluation. Therefore, requested alterations should reflect only those alterations that the Proponent considers vital to its proposal.

**APPENDIX A – FORM OF AGREEMENT  
SAMPLE CONTRACT**

**MEMORANDUM OF AGREEMENT  
[INSERT NAME OF AGREEMENT HERE]**

**THIS AGREEMENT** made this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

**BETWEEN:**                    **GOVERNMENT OF PRINCE EDWARD ISLAND**, as represented by  
the Minister of \_\_\_\_\_ ,

(hereinafter referred to as "Government")

**OF THE FIRST PART;**

**AND:**

\_\_\_\_\_ of \_\_\_\_\_  
in \_\_\_\_\_ County, Province of \_\_\_\_\_ ,

(hereinafter referred to as the "Contractor")

**OF THE SECOND PART.**

**WHEREAS** Government wishes to engage the services of the Contractor to carry out the services described in Schedule "A" attached hereto;

**AND WHEREAS** the Contractor has agreed to provide Government with these services on certain terms and conditions as more particularly set out in this Agreement;

**NOW THEREFORE** in consideration of the mutual promises contained in this Agreement, the Parties agree that the terms and conditions of their relationship are as follows:

**Definitions**

1. In this Agreement, the following definitions apply:
  - (a) "Agreement" means this Memorandum of Agreement and all attached schedules, and "Memorandum of Agreement" means this Agreement excluding all attached schedules;
  - (b) "Contractor" means [INSERT CONTRACTOR'S FULL LEGAL NAME HERE];
  - (c) "Fiscal Year" means a 12 month period beginning on April 1<sup>st</sup> in a year and ending on March 31<sup>st</sup> in the following year;

- (d) "Government" means Government of Prince Edward Island, as represented by the Minister of Finance;
- (e) "Parties" means Government and the Contractor, and "Party" means either of them as the context requires;
- (f) "Term" has the meaning provided in paragraph 3;
- (g) "Work" has the meaning provided in paragraph 2.

**Covenants of the Contractor and Government**

- 2. The Contractor shall perform the services, assume all those responsibilities and diligently execute all those duties described in the attached Schedule "A" (the "Work"), in a manner satisfactory to Government.
- 3. (a) Subject to the termination clause contained in the Termination section of this Agreement, the term of this Agreement shall commence on the \_\_\_\_ day of \_\_\_\_, 20\_\_, and end on the \_\_\_\_ day of \_\_\_\_, 20\_\_ (the "Term").
- (b) Subject to the termination clause contained in the Termination section of this Agreement and notwithstanding the date of signing of this Agreement, it is acknowledged by both Parties that the Contractor commenced the performance of the Work on the \_\_\_\_ day of \_\_\_\_, 20\_\_. It is further agreed that the amount of \$\_\_\_\_ is the maximum amount to be paid for the Work and includes all amounts which may be owed for the Work done since \_\_\_\_ day of \_\_\_\_, 20\_\_.

**Payments, Records and Accounts**

- 4. Government shall make payments to the Contractor in the following manner:
  - (a) Payment for the Work shall be at the rate of \$\_\_\_\_\_ per hour, exclusive of all taxes, but in no case shall the total payment exceed \$\_\_\_\_\_;
  - OR
  - (a) Payment for the Work shall be a fixed lump sum of \$\_\_\_\_\_, exclusive of all taxes, payable in installments, as follows: [i.e. List dates (milestones) when payments will be made including amount to be paid on each date]
  - AND, IF APPLICABLE
  - (b) Government shall pay all expenses of the Contractor, exclusive of all taxes, up to a maximum of \$\_\_\_\_\_, based on expenses actually incurred and verified by receipt.
  - (c) The payments described herein shall be paid upon the basis of the submission, by the \_\_\_\_ day of \_\_\_\_, 20\_\_, of a detailed statement together with all necessary receipts. Such statements shall be submitted to Government, and Government shall pay the amount owing within \_\_\_\_ days of receipt.

- (d) All payments are subject to a hold back of an amount equal to \_\_\_% of the amount billed. The hold back shall be paid upon completion and acceptance of the Work.
- OR
- (d) All payments are subject to a hold back of an amount equal to \_\_\_\_% of the amount billed. The hold back shall be paid upon the submission and acceptance of the final report and completion of the work.
- (e) The Contractor shall keep proper accounts and records of the cost to the Contractor of the Work and of all expenditures or commitments made by the Contractor under this Agreement including the related invoices, receipts and vouchers. Such accounts, invoices, receipts and vouchers shall, at all times, be open to audit, copying, extracting information and inspection by the authorized representatives of Government. The Contractor shall provide all facilities for the audits, inspections, copying and extractions and shall provide Government and its authorized representatives with all information that is requested from the accounts, records, invoices, receipts and vouchers.
- (f) Subject to statutory limitations, the Contractor shall not, without the written consent of Government, dispose of the accounts, records, invoices, receipts and vouchers related to this Agreement, but shall preserve and keep the same available for audit, copying, extracting information and inspections at any time.

#### **Conditions of Agreement**

5. (a) The Parties agree that the Contractor shall act as an independent contractor and that it is entitled to no other benefits or payments whatsoever than those specified in the Payments, Records and Accounts section of this Agreement.
- (b) The Parties agree that entry into this Agreement will not result in the appointment or employment of the Contractor, or any officer, clerk, employee or agent of the Contractor, as an officer, clerk, employee or agent of Government, nor shall the *Civil Service Act* R.S.P.E.I. 1988, Cap. C-8 apply.
6. (a) The Contractor agrees to accept sole responsibility to submit any applications, reports, payments or contributions for income tax, Canada Pension Plan, Employment Insurance, Workers' Compensation assessments, Goods and Services Tax, Harmonized Sales Tax, or any other similar matter which the Contractor may be required by law to make in connection with the Work.
- (b) The Contractor agrees to accept sole responsibility to comply with all federal, provincial and municipal legislation which may have application to the Work, and agrees to comply with all provincial and federal legislation affecting conditions of work and wage rates including the *Employment Standards Act* R.S.P.E.I. 1988, Cap. E-6.2, the *Workers Compensation Act* R.S.P.E.I. 1988, Cap. W-7.1 or any other laws that impose obligations in the nature of the employers' obligations. The Contractor agrees to follow the Public Service Commission Human Resource Policies 9.05 Violence in the Workplace Policy; 9.08 Drug, Alcohol, and Medication Policy; and 11.01 Policy for the Prevention and Resolution of Harassment in the Workplace while working on Government sites, in Government vehicles or alongside Government staff.

- (c) The Contractor, before undertaking any Work, shall provide to Government either a certificate of good standing by the Workers Compensation Board or written confirmation from the Workers Compensation Board that such certificate is not required.
  - (d) The Contractor agrees to accept the full cost of doing those things required under this paragraph, and will not charge or seek reimbursement from Government in any way, such costs having been taken into consideration and included in the rates of payment stipulated in Payments, Records and Accounts section of this Agreement.
7. Any payment under this Agreement is subject to a Provincial appropriation for the payment being approved by the Legislative Assembly of Prince Edward Island for Government's fiscal year in which the payment is to be made.

### **Reports**

8. (a) The Contractor shall make interim reports as Government may direct.
- (b) The Contractor shall prepare and submit a draft final report for review and approval of Government not later than the \_\_\_\_ day of \_\_\_\_ 20\_\_. Government shall either signify its approval or note the deficiencies in writing to the Contractor within \_\_\_\_ days of its submission. The final report shall be submitted to Government not later than the \_\_\_\_ day of \_\_\_\_, 20\_\_, unless the Parties agree otherwise in writing.

### **Administration**

9. Subject to any specified time schedule or location where the Work is to be performed as may be set forth in Schedule "A" attached hereto, the Work is to be performed at the locations specified in Schedule "B" - Locations of Work to Be Performed and the Contractor shall follow the same time schedule as applicable to employees of Government.
10. Government shall provide such support, direction, decisions and information to the Contractor as it deems necessary or appropriate under this Agreement and may appoint a person to administer this Agreement and communicate with the Contractor.

## **Termination**

11. Notwithstanding other provisions of this Agreement, Government may terminate this Agreement in its entirety, or any part thereof, at any time by a notice in writing, signed by or on behalf of Government and delivered to the Contractor by hand delivery, mailed to the Contractor's last known place of business, facsimile transmission, or electronic communication. This Agreement shall be determined to have ended upon the date of delivery, sending by electronic communications or mailing of such notice in which event the Contractor shall have no further claim against Government, except that the Contractor will be paid pursuant to and in accordance with the provisions of the Payments, Records and Accounts section of this Agreement for the Work performed up to the date of termination by written notice. Such payment shall include all firm commitments made by the Contractor prior to the receipt of the notice and for which the Contractor is liable for payment, less any sums paid by Government to the Contractor on account.
12. Notice in this Agreement is deemed to have been effected on the day of delivery in person, facsimile, electronic communication, or upon mailing of the notice.

## **Confidentiality and Copyright**

13. Any and all information, knowledge or data made available to the Contractor as a result of this Agreement shall be treated as confidential information. The Contractor shall not directly or indirectly disclose or use the information, knowledge or data for purposes unrelated to the Agreement at any time without first obtaining the written consent of Government, unless the information, knowledge or data is generally available to the public. Without limiting the foregoing, the Parties confirm that they have executed a Non-Disclosure Agreement, a copy of which is attached as Schedule "C" to this Agreement.
14.
  - (a) The Parties agree that all lists, reports, information, statistics, compilations, analyses, and other data generated or collected in any way as a result of this Agreement are the exclusive property of Government and shall not be distributed, released, transmitted or used in any way, via any media, outside the purposes of this Agreement, by the Contractor, its employees, agents, servants or others for whom the Contractor is responsible, without the written consent of Government.
  - (b) The Parties agree that Government owns the copyright on all aspects of the Work, including all manner of data as set out in sub-paragraph (a) and including all software developed as a result of the Work whether in the form of raw data, analyses, database entries or software or hardware code of any kind or in any form whatsoever, including but not limited to object code and source code and any necessary information with respect to the use of such code such as encryption keys, compiler information and version number.
  - (c) The Contractor relinquishes all rights to the Work created pursuant to this Agreement, including all rights and moral rights otherwise accruing to the Contractor pursuant to the *Copyright Act*, R.S.C. 1985, c. C-42.



15. (a) Each person on behalf of the Contractor who properly requires access to any application involved in this Agreement is required to, and shall only use, a unique user name and password assigned by Government exclusively to that person for that person's sole use. For greater certainty, this requirement applies to any person who is accessing any test or production data residing on any Government server or network, and any copies of such data authorized to temporarily reside on the servers or networks of the Contractor.
- (b) Before beginning the Work, the Contractor agrees to execute Government's Acceptable Use Agreement, a copy of which is attached hereto as Schedule "D".

### **Conflict of Interest**

16. The Contractor warrants that as at the date of this Agreement, no conflict of interest, or any circumstance that might interfere with independent and objective exercise of judgment, exists or is likely to arise in relation to execution of this Agreement or its subject matter. The Contractor shall immediately notify Government, in writing, if any such actual or potential conflict of interest should arise at any time during the Term. In the event Government discovers or is notified by the Contractor of an actual or potential conflict of interest, Government, in its sole discretion, may either:
  - (a) allow the Contractor to resolve the actual or potential conflict to the satisfaction of Government; or
  - (b) terminate the Agreement in accordance with the Termination section of this Agreement.

### **Freedom of Information and Protection of Privacy Act**

17. The Contractor acknowledges that this Agreement, and information provided in respect of this Agreement, may be subject to release under the *Freedom of Information and Protection of Privacy Act* R.S.P.E.I. 1988, Cap. F-15.01. The Contractor may be consulted prior to release of any information.
18. The Contractor acknowledges and agrees that, in the event the Work involves the collection or use of personal information, it is subject to the *Freedom of Information and Protection of Privacy Act*, and that personal information may not be released to any third party or unauthorized individual.

### **Indemnification and Insurance**

19. The Contractor shall indemnify and hold harmless Government, its agents, representatives and employees from and against all claims, demands, losses, costs, damages, actions, suits or proceedings of every nature and kind whatsoever arising out of or resulting from the performance of the Work (herein called the "Claim"), provided that any such Claim is caused in whole or in part by any act, error or omission, including, but not limited to, those of negligence of the Contractor or anyone directly or indirectly employed by the Contractor or anyone for whom the Contractor may be liable.

20. The Contractor shall, without limiting its obligations or liabilities under this Agreement and at its own expense, provide and maintain the following insurance with insurers and in forms and amounts acceptable to Government:
- (a) Commercial General Liability insurance in an amount not less than Two Million (\$2,000,000.00 CAD) Dollars inclusive per occurrence against bodily injury and property damages. Government of Prince Edward Island is to be added as an additional insured under this policy. Such insurance shall include, but not be limited to:
    - Products and Completed Operations Liability;
    - Owner's and Contractor's Protective Liability;
    - Blanket Written Contractual Liability;
    - Contingent Employer's Liability;
    - Personal Injury Liability;
    - Non-Owned Automobile Liability;
    - Cross Liability;
    - Employees as additional Insureds;
    - Broad Form Property Damage; and
    - If applicable, Tenant's Legal Liability in an amount adequate to cover a loss to premises of Government occupied by the Contractor.
  - (b) Automobile Liability insurance on all vehicles owned, operated or licensed in the name of the Contractor in an amount not less than Two Million (\$2,000,000.00 CAD) Dollars.
  - (c) Professional Liability insurance in an amount not less than Two Million (\$2,000,000.00 CAD) Dollars on a claims made basis, subject to an annual aggregate limit of Two Million (\$2,000,000.00 CAD) Dollars insuring the Contractor's liability resulting from errors and omissions in the performance of professional services under this Agreement. Such insurance shall continue for a term of six (6) years following completion of the Work.
  - (d) The policy or policies required by this Agreement shall be in a form and with insurers satisfactory to Government. All required insurance shall be endorsed to provide Government with 30 days advance written notice of cancellation or material change. The foregoing insurance shall be primary and not require the sharing of any loss by any insurer of Government nor by any other form of recovery available such as the Provincial Self Insurance and Risk Management Fund. A certified copy of the policy, or policies, shall be delivered to Government prior to execution of this Agreement. Default of delivery to Government or receipt of the certified copy of the policy, or policies, by Government shall not be construed as acknowledgment or concurrence that there has been compliance with the terms of this Agreement.

#### **Memorandum of Agreement to Prevail**

21. In the event of any conflict or inconsistency between Schedule "A" to this Agreement and the Memorandum of Agreement, the Memorandum of Agreement shall prevail, to the extent of the conflict or inconsistency.

**General**

- 22. This Agreement shall not be assigned or subcontracted in whole or in part by the Contractor without the prior written consent of Government.
- 23. This Agreement shall enure to the benefit of and be binding upon the Parties hereto and, subject to the above assignment and subcontracting clause, their executors, administrators, successors and assigns.
- 24. This Agreement shall be interpreted and applied in accordance with the laws and in the Courts of the Province of Prince Edward Island.
- 25. This Agreement, including Schedules "A", "B", "C" and "D" constitutes and expresses the entire agreement of the Parties hereto and any amendment or addition thereto shall be in writing and signed by the respective Parties.
- 26. The headings are inserted in this Agreement for reference only and shall not form part of the Agreement.
- 27. The provisions of this Agreement which, by their terms, are intended to survive or which must survive in order to give effect to continuing obligations of the Parties, shall survive the termination or expiry of this Agreement.
- 28. If any provision of this Agreement is, for any reason, invalid, that provision shall be considered separate and severable from this Agreement, and the other provisions of this Agreement shall remain in force and continue to be binding upon the Parties as though the invalid provision had never been included in this Agreement.

**IN WITNESS WHEREOF** the Parties thereto have duly executed this Agreement as of the date first above written.

<b>SIGNED, SEALED &amp; DELIVERED</b>	)	<b>Government of Prince Edward Island,</b>
in the presence of:	)	as represented by the Minister of Finance
	)	
	)	
	)	
_____	)	_____
	)	

<b>SIGNED, SEALED &amp; DELIVERED</b>	)	<b>[INSERT CONTRACTOR'S FULL</b>
in the presence of:	)	<b>LEGAL NAME HERE]</b>
	)	
	)	
	)	
_____	)	_____
	)	Authorized Signing Officer

**SCHEDULE "A"**

**TO AGREEMENT  
BETWEEN  
GOVERNMENT OF PRINCE EDWARD ISLAND  
AND  
THE CONTRACTOR**

DATED THE \_\_\_\_ DAY OF \_\_\_\_\_, 20\_\_

**STATEMENT OF WORK**

**Objective**

**Contractor Responsibilities**

**Government Responsibilities**

**Deliverables with Timeline**

**Additional Financial Information**

**SCHEDULE "B"**

**TO AGREEMENT  
BETWEEN  
GOVERNMENT OF PRINCE EDWARD ISLAND  
AND  
THE CONTRACTOR**

**DATED THE \_\_\_\_\_ DAY OF \_\_\_\_\_, 20\_\_\_\_**

**LOCATIONS OF WORK TO BE PERFORMED**

Locations of work will be primary in Charlottetown, Prince Edward Island. The locations may include the following sites:

**SCHEDULE "C"**  
**NONDISCLOSURE AGREEMENT**

This Non-Disclosure Agreement is hereby made between the Government and the Contractor and is dated as of this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_[**USE THE SAME DATE HERE AS THE DATE OF THE AGREEMENT, OR SUCH EARLIER DATE AS MAY BE NECESSARY**].

For the purposes of providing professional information technology services as more particularly described in the Agreement to be entered into between the Parties, which Agreement is even dated herewith ("the Agreement"), the Government may be disclosing information to the Contractor that is of the strictest of confidence ("the information"). Therefore, the Contractor agrees that it shall:

1.
  - a) Use the information solely for the purpose stated in the Agreement;
  - b) Restrict disclosure of the information to those employees of the Contractor required to know such information in order to accomplish the purpose stated in the Agreement;
  - c) Advise each such employee, before he or she receives access to the information, of the obligations under this Non-Disclosure Agreement and require each such employee to maintain these obligations; and
  - d) Within ten (10) days following a request of the Government, return to the Government all documentation, diagrams, computer media and other materials containing any portion of the information, or confirm to Government, in writing, the destruction of such materials.
2. The information shall remain the sole property of Government.
3. The rights and obligations of the Parties under this Non-Disclosure Agreement may not be sold, assigned or otherwise transferred.

4. Notwithstanding the date of execution of this Non-Disclosure Agreement, the Parties agree that it is effective as of the date first above written and that it will continue in effect indefinitely, unless terminated in writing by either Party. However, the Contractor's obligations of confidentiality and restrictions on use of the information disclosed by Government shall survive any termination of this Non-Disclosure Agreement.

**GOVERNMENT OF PRINCE EDWARD ISLAND**

as represented by the Minister of Finance (or designate with signing authority)

Signed: \_\_\_\_\_

Name: \_\_\_\_\_

Date: \_\_\_\_\_

**[INSERT NAME OF CONTRACTOR HERE]**

Signed: \_\_\_\_\_

Name: \_\_\_\_\_

Date: \_\_\_\_\_

**SCHEDULE "D"**  
**Government Provided Computer Technology**  
**Acceptable Use Agreement – External Contract Users**

Government requires this Acceptable Use Agreement to be executed by all external contractors in order to protect Government, Government employees and all information in Government's custody or under the control of Government or a public body.

This Acceptable Use Agreement ("Agreement") applies to the contractor and all agents, officers and employees of the contractor who are using Government provided Computer Technology (hereafter each are referred to as the "Contractor").

The confidentiality, integrity and availability of Government provided Computer Technology used inside or outside of Government facilities, that contains confidential and personal information, must be preserved at all times. Access to this Government provided Computer Technology is granted to the Contractor only under the following conditions:

1. Government provided Computer Technology is to be used by the Contractor to support authorized programs and services.
2. The Contractor must use only system information technology which the Contractor is authorized to use and shall use such only in the manner and to the extent authorized. Ability to access information technology resources does not, by itself, imply authorization to do so.
3. Changing any Government provided computer system configuration is not permitted unless approved by Government.
4. Personal use of Government provided Computer Technology is to be of an appropriate nature that will not incur additional cost or increased risk to Government. Such Computer Technology is not to be used for any personal activity that may cause embarrassment to the Contractor or Government and must not be used to access or promote inappropriate sites, including but not limited to pornography, racism, hatred, gambling, obscenity or any illegal activities.
5. The Contractor is responsible and accountable for the use of the Contractor's user ID, passwords and other access control items in possession of the Contractor for Government's Computer Technology. They are not to be shared.
6. The bandwidth available to Government is limited. Therefore the use of streaming audio and video (e.g. Online radio, YouTube, etc.) should be limited to only those streaming audio and video links necessary to complete the work contracted for.
7. Removal of, or alterations to, Government provided Computer Hardware or components must be approved by Government.
8. Prior to downloading or installing Computer Software on Government-provided Computer Hardware, confirmation of acceptability must be obtained from Government.



9. The Contractor must not violate the privacy of other users and their accounts, regardless of whether those accounts are securely protected. Technical ability to access other's accounts does not, by itself, imply authorization to do so.
10. The Contractor must not intentionally access or use any Government data which is not necessary for the completion of the work being performed under the contract.
11. The Contractor's computer shall not be left unattended while the Contractor is logged on to the Government network. A password protected screen saver is required to reactivate a session after 5 minutes of inactivity.
12. Work related Electronic Data must be stored on the Government-provided file server where possible. If work related Electronic Data is not stored on the file server it is the Contractor's responsibility to prepare and maintain backup copies in accordance with Government policies, the *Archives and Records Act* and the *Freedom of Information and Protection of Privacy Act*.
13. Willful or intentional violations of this Agreement will, at the sole option of Government, result in immediate termination of contract, as well as the pursuit of all other legal remedies available at law.
14. The Contractor understands and agrees that when the contract with Government ceases, for whatever reason, the authorization to use the Government-provided Computer Technology and system also ceases.

The Contractor hereby acknowledges and agrees as follows:

The definitions attached as a schedule to this Agreement apply to this Agreement.

The Contractor has read and understands this Agreement and recognizes that technical monitoring takes place to protect the Government system and ensure all users are complying with Government policy.

The Contractor agrees to comply with this Agreement and, without limiting the foregoing, agrees to access and use the Government provided Computer Technology only in accordance with the terms and conditions set out in this Agreement. **(Please type or print your name below, and sign and date before a witness)**

Name of User	User Signature	Date
Name of Witness	Witness Signature	Date

## Definitions

The following definitions apply to this Acceptable Use Agreement:

**Computer Hardware** means workstations, stand alone computers, network computers, laptops, notebooks, servers, PDAs, Blackberries and any other peripherals.

**Computer Software** means written programs, procedures or rules and associated documentation pertaining to the operation of a computer system, which includes packaged software, downloadable executable, screen savers, macro, freeware and shareware.

**Computer Technology** means Government computer systems and includes all hardware, software, and Electronic Data.

**Electronic Data** means Government data that is stored and readable in electronic form without regard to the hardware or software used to produce the Government data, excluding Computer Software.

## APPENDIX B – SUBMISSION FORM

### B.1 Proponent Information

Please fill out the following form, naming one person to be the Proponent's contact for the RFSQ process and for any clarifications or communication that might be necessary.	
Full Legal Name of Proponent:	
Any Other Relevant Name under which Proponent Carries on Business:	
Street Address:	
City, Province/State:	
Postal Code:	
Phone Number:	
Fax Number (if any):	
Company Website (if any):	
Proponent Contact Name and Title:	
Proponent Contact Phone:	
Proponent Contact Fax (if any):	
Proponent Contact Email:	
HST / GST Registration Number (Leave blank if NOT applicable):	

### B.2 Roster

The Proponent has carefully examined the RFSQ documents and has a clear and comprehensive knowledge of the Deliverables. The Proponent represents and warrants its ability to provide the Deliverables in accordance with the service category requirements of the RFSQ.

### B.3 Mandatory Forms

The Proponent encloses as part of the proposal the mandatory forms set out below:

FORM	INITIAL TO ACKNOWLEDGE
Submission Form (Appendix B)	
Declaration of Contract Intentions (Appendix H)	
Corporate Overview, Project Profile and Reference (Appendix J)	

### B.4 Addenda

The Proponent is deemed to have read and taken into account all addenda issued by the Province.

**B.5 No Prohibited Conduct**

The Proponent declares that it has not engaged in any conduct prohibited by this RFSQ.

**B.6 Conflict of Interest**

For the purposes of this RFSQ, the term “Conflict of Interest” includes, but is not limited to, any situation or circumstance where:

- (a) in relation to the RFSQ process, the Proponent has an unfair advantage or engages in conduct, directly or indirectly, that may give it an unfair advantage, including but not limited to (i) having, or having access to, confidential information of the Province in the preparation of its proposal that is not available to other Proponents, (ii) communicating with any person with a view to influencing preferred treatment in the RFSQ process (including but not limited to the lobbying of decision makers involved in the RFSQ process), or (iii) engaging in conduct that compromises, or could be seen to compromise, the integrity of the open and competitive RFSQ process or render that process non-competitive or unfair; or
- (b) in relation to the performance of its contractual obligations under an agreement for the Deliverables, the Proponent’s other commitments, relationships or financial interests (i) could, or could be seen to, exercise an improper influence over the objective, unbiased and impartial exercise of its independent judgement, or (ii) could, or could be seen to, compromise, impair or be incompatible with the effective performance of its contractual obligations.

Proponents should disclose the names and all pertinent details of all individuals (employees, advisers, or individuals acting in any other capacity) who participated in the preparation of the proposal; **AND** were employees of the Province within twelve (12) months prior to the Submission Deadline.

If the box below is left blank, the Proponent will be deemed to declare that (a) there was no Conflict of Interest in preparing its proposal; and (b) there is no foreseeable Conflict of Interest in performing the contractual obligations contemplated in the RFSQ.

Otherwise, if the statement below applies, check the box.

- The Proponent declares that there is an actual or potential Conflict of Interest relating to the preparation of its proposal, and/or the Proponent foresees an actual or potential Conflict of Interest in performing the contractual obligations contemplated in the RFSQ.

If the Proponent declares an actual or potential Conflict of Interest by marking the box above, the Proponent must set out below details of the actual or potential Conflict of Interest:


**B.7 Proposal Irrevocable**

The Proponent agrees that its proposal shall be irrevocable for a period of **Ninety (90)** days following the Submission Deadline.

**B.8 Disclosure of Information**

The Proponent hereby agrees that any information provided in this proposal, even if it is identified as being supplied in confidence, may be disclosed where required by law or by order of a court or tribunal. The Proponent hereby consents to the disclosure, on a confidential basis, of this proposal by the Province to the advisers retained by the Province to advise or assist with the RFSQ process, including with respect to the evaluation of this proposal.

\_\_\_\_\_  
Signature of Witness

\_\_\_\_\_  
Signature of Proponent Representative

\_\_\_\_\_  
Name of Witness

\_\_\_\_\_  
Name of Proponent Representative

\_\_\_\_\_  
Title of Proponent Representative

\_\_\_\_\_  
Date

I have the authority to bind the Proponent.

## APPENDIX C – IT PROFESSIONAL SERVICES ROSTER FRAMEWORK

### **C.1 Procurement Process**

The RFSQ gathers information about supplier capabilities and qualifications, with the intention of creating a prequalified supplier list. It is the first stage in a two-stage selection process. The second stage consists of issuing a Tender/Statement of Work to the prequalified. Typically, the second stage of selection under a prequalification arrangement represents the invitational competitive procurement process.

The purpose of engaging in this two-staged process is to minimize submission requirements for pre-qualified Proponents, when a need arises, so that the Proponent can respond as quickly as possible and IT Shared Services can expedite the contract process accordingly.

#### **C.1.1 Stage I - Establishing Qualified Supplier Roster**

A qualification process is conducted through the public issuance of an RFSQ, and suppliers are pre-screened based on the qualification criteria and evaluation process set out in the RFSQ. The evaluation process specifies the minimum threshold or ranking and conditions in order for a supplier to be qualified. Due to the variability of requirements, Qualified Supplier Rosters do not include pricing for professional service resources.

The qualified suppliers in this RFSQ process will create the new IT Professional Services Roster. IT Shared Services is responsible for creating and managing the IT Professional Services Roster following the Framework in section C.2.1.

#### **C.1.2 Stage II – Competitive Procurement Opportunities**

IT Shared Services must:

- a. Identify an estimate of the total cost of the procurement, including any possibilities for extensions or costs that are beyond the per diem rate such as, travel expenses and lodging. The procurement value will not be reduced (e.g. dividing a single procurement into multiple procurements) in order to circumvent the approval requirements.
- b. Determine if prequalified vendor list is an appropriate procurement method or if an open RFP will be issued.
- c. When using the prequalified vendor lists, all suppliers in the appropriate category will receive an identical invitation by email and follow the process detailed in the Statement of Work documents.
- d. Document the process, including the original invitation, specifications and evaluation criteria. All documentation should accompany the appropriate Statement of Work and will be stored by IT Shared Services.

- e. The Professional Services Agreement must be signed before a project can proceed.

Use of the IT Professional Services Roster is not mandatory by IT Shared Services, when it so chooses, it will follow the guidelines and those qualified suppliers on the list will be provided notice, by email, of the procurement opportunity within the prequalified service category.

## **C.2 IT Professional Services Roster Framework**

There will be opportunities during the term of the contract and its extension periods to add, remove or update prequalified suppliers. On-boarding is allowed up to six months prior to expiry of the initial term and subsequent terms.

### **C.2.1 Call Up from Roster**

The Province, in its sole discretion, may use the IT Professional Services Roster in connection with work assignments. A work assignment could require one specialized consultant having a certain demonstrated experience and proficiency level in one or more Service Categories or may require multiple consultants and multiple Service Categories. Once the Service Category requirements are identified then all suppliers that qualify under that service category or categories will be invited, by email, to submit a response to a Statement of Work/Tender.

The Province has no obligation to:

- a. enter into a Contract with any one or more Qualified Suppliers; or
- b. invite any one or more Qualified Suppliers to participate in competitive processes for a Contract.

The Province reserves the right, in its sole discretion, to:

- a. employ open competitions that include suppliers external to the IT Professional Services Roster;
- b. otherwise engage suppliers external to the IT Professional Services Roster in connection with any project required by the Province; and
- c. at any time, cancel, extend, expand or make a call to the market-place to renew IT Professional Services Roster.

#### **C.2.1.1 Competitive Process**

Where IT Shared Services has elected to conduct a competitive process among the prequalified suppliers, the process is:

- a. IT Shared Services will provide to all the prequalified suppliers, within the appropriate Service Category, a draft SOW package for the work assignment;
- b. each draft SOW package will contain information as to how the response will be evaluated and the selected Successful Proponent chosen;
- c. if a draft SOW package indicates a particular qualification is required by the proposed candidate then proof of such qualification will be a mandatory requirement;

- d. examples may include but aren't limited to
  - Education e.g., Bachelor's Degree, Master's Degree
  - Technical e.g., Oracle Certification, EPIC Certified
  - Professional e.g., PMP, IIBA
- e. a prequalified supplier will not be penalized, if it declines to participate in an opportunity;
- f. the prequalified suppliers must provide IT Shared Services, within 5 working days of receiving the draft SOW package (or within any longer time period specified in the draft SOW), the proposed total price for performing the work and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Statement of Work and the Contract Agreement;
- g. the suppliers will not be paid for preparing or providing its response or for providing other information required to prepare and validly issue the SOW.

#### **C.2.1.2 Form and Content of Draft Statement of Work Package**

IT Shared Services will provide the prequalified suppliers with a description of the work in a Statement of Work using a form specified in **Appendix G – Sample Statement of Work**.

The draft Statement of Work package will contain the details of the activities to be performed, and will contain the following information, if applicable:

- a. Statement of Work identification number;
- b. The date by which the Supplier's response must be received (which will appear in the draft Statement of Work, but not the final Statement of Work);
- c. Billing details to be used;
- d. the service category of resources, experience level and the number required;
- e. a description of the work outlining the activities to be performed and identifying any deliverables (such as reports);
- f. the contract period start and completion dates;
- g. milestone dates for deliverables and payments (if applicable);
- h. the number of person-days of effort required;
- i. whether the work requires on-site activities and the location;
- j. the language profile of the resources required;
- k. the educational, certification and or experience level required;
- l. an indication of whether it is a firm price or a maximum Statement of Work price (and, for maximum price, the SOW must indicate how the final amount payable will be determined; where the SOW does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Supplier demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges);
- m. any other constraints that might affect the completion of the task; and
- n. Declaration of Contract Intentions form (Appendix H).



### **C.2.1.3 Resource Requirements**

- a. The Proponent must have the right quantity of resources within the appropriate Service Category with the minimum educational and experience level identified in the response to the draft SOW package.
- b. The response will include the resumes and availability dates of each proposed resource.
- c. The Proponent must ensure the resources maintain any professional qualifications and security levels associated with the corresponding service categories of the bid solicitation for which they are available.
- d. The Proponent must avoid delays associated with the Contract's security requirements by initiating the assessment and security clearance of its resources by IT Shared Services within 10 business days of Contract award.

### **C.2.1.4 Awarding of Contract**

Work cannot begin until the Contract, including Statement of Work, have been issued and signed by both parties.

Contract values in excess of \$100,000 will require additional weeks to award due to approval processes.

The Province may make changes to the SOW requirements and re-issue the tender. It may also decide to issue as an open RFP.

The Province may not necessarily select the Qualified Supplier offering the lowest rates.

## **C.3.1 IT Professional Services Roster Changes**

### **C.3.1.1 Additions to Roster**

Suppliers can apply for qualification and inclusion on the IT Professional Services Roster at any time during the term of the Roster. The supplier will need to contact Procurement Services or IT Shared Services contact listed in section 1.2 to obtain a copy of the RFSQ and instructions.

The same terms and conditions, qualifications, requirements and evaluation processes set out in this **RFSQ** document will apply to any additional suppliers. The supplier will submit its response to IT Shared Services for evaluation. If successful, the supplier is added under the Service Category.

Regardless of the date a supplier is added, the Roster will expire at the end of the contract term or end of extension period (if applicable).

#### **C.3.1.2 Updating Supplier Information**

Occasionally the supplier address, contact information, or ability to perform work in the Service Category may change. Suppliers will immediately advise the Province of any material changes to the information contained in their Response.

Emailing a request for change to IT Shared Services should identify if all Service Categories the supplier qualifies for need to be changed or just one Service Category.

Requests for removal of a supplier from a Service Category is by email.

#### **C.3.1.3 Adding Supplier to Service Category**

A prequalified supplier can request addition to a Service Category.

The same terms and conditions, qualifications, requirements and evaluation processes set out in this **RFSQ** document will apply to the supplier for addition to another Service Category. The supplier will submit its response to IT Shared Services for evaluation. If successful, the Roster will include the supplier in that Service Category.

#### **C.3.1.4 Adding Service Category to the Roster**

The Province will not add a Service Category during the contract term.

#### **C.3.1.5 Removal of Suppliers from a Roster**

Suppliers that fail to perform contracts awarded through a Roster Competition in a satisfactory manner, as determined in accordance with the Statement of Work and Contract, will no longer be eligible to participate in Roster Competitions and will not be eligible to requalify during the term of this RFSQ.

The Province has the sole discretion to remove a Qualified Supplier from the IT Service Providers Roster for unsatisfactory performance by a Qualified Supplier in a Contract or for failing to meet the requirements for staying on the IT Service Professional Roster as set out in this RFSQ or communicated by the Province from time to time.

## APPENDIX D – RFSQ PARTICULARS

### D.1 The Deliverables

Proponents may submit a response for any number of the eighteen service categories. Proponents are not required to submit a response for every service category.

Responding to multiple service categories will not make one Proponent look more favorable than a Proponent responding to only one service category.

The Proponent may be listed several times on the IT Professional Services Roster under different Service Categories. The Proponent will only be on the roster for the service category that they are qualified.

The Proponent should use **Schedule J.1 Project and References tab 2 –“J.1 Participating Categories”** to identify which categories they are including responses.

### D.2 Material Disclosures

#### D.2.1 No guarantee of volume of work or exclusivity of contract:

The Province makes no guarantee of the value or volume of work to be assigned to the selected Proponents. Any Agreement entered into pursuant to an invitational second-stage competitive process will not be an exclusive contract for the provision of the described Deliverables. The Province may contract with others for the same or similar deliverables to those described in this RFSQ or may obtain the same or similar deliverables internally.

#### D.2.2 Consultant Conflict of interest:

A conflict of interest is created where a consultant retained to develop competitive procurement documents has the ability to fulfill the procurement need contemplated in the procurement documents.

The terms of agreement must preclude any consultant retained to develop the competitive procurement documents from participating in the competition.

### D.3 Proposal Format

To help ensure consistency in Proponent responses and ease the evaluation process, the proposal should be prepared and packaged, as outlined in the sections that follow. Please print double-sided whenever possible and limit promotional and/or marketing materials to the information specifically requested in this RFSQ.

#### D.3.1 Structure of Proposal

The proposal should be comprised of the sections below, presented in the order listed:

- Title page** – This should clearly identify the Proponent’s name, postal address, telephone number, and email address as well as the project title and RFP #.

**Table of Contents**

- Body of proposal** – This should include the Proponent’s technical and pricing responses as set out in this RFP. The body should be printed on 8½ inch x 11 inch pages in length including appendices, 8½ inch x 14 inch, folded pages are permissible for project approach graphics or Gantt charts.
- Appendices** – These should include any response forms included in the RFP and any additional information, brochures, etc. that support the proposed services. Entries for each Appendix should appear in the Table of Contents.

**D.3.2 Proposal Package**

A complete proposal package is comprised of the elements below, presented in the order listed:

- Administrative Elements** – The following items should be placed on **top** of the Proposal, in the order listed:
  - One (1) PEIRFP Form** – One original of this PEIRFP Form should be **completed, signed and included** in your proposal. The business name provided under ‘NAME OF COMPANY’ on page 1 of this PEIRFP Form should be the same name as that reflected on your company’s business registration profile. Ideally, this PEIRFP Form should be placed on **top** of your proposal and will be retained by Procurement Services.
  - Submission Form (Appendix B)** signed by an authorized representative of the Proponent.
  - Declaration of Contract Intentions (Appendix H)**
- One (1) Letter of Introduction** – This should identify the Proponent and be signed by a signing officer for the Proponent in order to bind the Proponent to the statements made in the proposal.
- One (1) Original** – This is the original Proposal document containing the technical responses. The title page should be marked with the text ‘**ORIGINAL**’ at the top. This original Proposal should be left **unbound**.
- Quantity (2) Hard Copies** – Proposals without the correct number of copies may be rejected. The title pages for the copies should be prepared in the same way as the title page for the original Proposal, except these should be marked with the text ‘**COPY**’ at the top. Include the completed PEIRFP Form in each copy. One of the copies should be left unbound.
- One (1) Electronic Copy** – Prepare an electronic copy of your Proposal as a Portable Document Format (PDF) file (preferably), or alternately as a Word file, and include this in your Proposal. The file name should include an abbreviated form of the Proponent’s name and RFP #. Electronic copy must be on a virus-free memory stick. Label the memory stick with the Proponent’s name and RFP #.

### D.3.3 Proposal Submission

- External packaging** – Ensure the external packaging reflects the information listed below:
  - Proponent's name
  - Shipping address
  - Telephone number
  - Fax number
  - RFP #

#### **Official Record of Submission**

The original and all copies of the Proposal should be identical (excluding any obvious differences in labelling, as noted). If discrepancies between the original Proposal and copies of the Proposal are discovered during the evaluation or during the life of any Contract that emerges from this RFP, **the original Proposal retained by Procurement Services shall be taken as the correct version** and the Proponent will be advised accordingly.

### D.3.4 Response Requirements

The Proponent should submit its response in the following format:

- Title page
- Table of contents
- PEIRFP Form
- Appendix B Submission Form
- Appendix H Declaration of Contract Intentions
- Letter of Introduction
- Schedule J.3 Mandatory
- Schedule J.4 Company Overview
- Schedule J.1 Participating Categories
- Schedule J.2A Project Profile and Reference 1
- Schedule J.2B Project Profile and Reference 2
- Schedule J.2C Project Profile and Reference 3
- Repeat J.2A, J.2B and J.3C for each additional Service Category.**

### D.3.5 Company Overview (10 points)

The Proponent is to prepare a brief Statement of Qualifications using the template included as Schedule J.1 Company Overview, Project Profile and Reference tab J.4 Company Overview **(maximum 3 pages):**

- a. Company Information (Overview and Background)
- b. Experience
- c. Year company established
- d. Primary Services this company provides
- e. Ownership, affiliated and sister companies
- f. Company Organization Chart including sister companies/affiliated organizations and showing the management structure for the service categories.
- g. List of types of Certifications, Professional and Trade Affiliations held by staff and relevant to Service Categories identified.
- h. List any vendor partnerships eg. IBM, Microsoft, Oracle Solarwinds...

### **D.3.6 Demonstrated Experience – Project Profile and References (45 points)**

Provide **three (3) Project Profiles with References per Service Category** that is similar in nature to the Service Category requirements defined in Appendix I. A template has been included in Appendix J for these project profiles and references.

Select references that are similar to Government, and provide a reference contact name, phone number, fax number and email address.

The references should be for work that is substantially completed and similar to work described in the Service Category. If your firm has completed previous similar work for the Province of Prince Edward Island it is recommended that you utilize this experience. If your firm has not completed prior projects with the Province of Prince Edward Island you will not be penalized.

Proponents are able to use the prior work experiences of their employees, as long as the references and projects are within the past five (5) years and meet the needs of the service categories.

The Proponent will include a **maximum of six (6) pages per Service Category**. The summaries for each service category will include:

- Brief description of the project and the role your company had in the project.
- Services provided by the corporation as they relate to the Service Category.
- Role and responsibility for the consultant in the project (eg. prime or sub-consultant)
- Key consultant staff on the project and their roles
- Start and completion dates of the project
- Project Reference client organization, client contact, contact's title and client phone or email

A template has been prepared to allow you to provide description of your experience and references see **Appendix J – Company Overview, Project Profile and References**.

Service Category 1 – Project Profile and Reference 1  
Service Category 1 – Project Profile and Reference 2  
Service Category 1 – Project Profile and Reference 3

If applying for another Service Category, repeat D.3.6 Demonstrated Expertise. The same projects may be used but the Proponent must demonstrate how they are able to meet the requirements for this Service Category.

Service Category 2 – Project Profile and Reference 1  
Service Category 2 – Project Profile and Reference 2  
Service Category 2 – Project Profile and Reference 3

### **D3.7 Client Reference(s) and Checks (45 points)**

The Evaluation Committee will use 10 days for reference checks. The Proponent will be notified by email when the 10 day period is scheduled.

The Proponent will provide for each of the project references provided with a Service Category: the client organization, client contact, contact's title and client phone or email.

- a. All references will receive a phone call by a member of the Evaluation Committee establishing an appropriate time to do a reference check. The reference check is a standard list of questions included as section D3.7.1.
- b. Wherever information provided by a reference differs from the information supplied by the Proponent, the information supplied by the reference will be the information evaluated.
- c. The Evaluators will not award any points unless they are successful in obtaining a reference check within 10 working days.
- d. Proponent will be notified that customer reference has not responded after three (3) attempts to schedule a time to do the reference check.
  - On the fifth working day after the initial phone call to the reference, if the Evaluator has not received a response, the Evaluation Committee will notify the Proponent by email, to allow the Proponent to contact its reference directly to ensure that it responds to the Evaluator within five (5) working days.
  - If the individual named by a Proponent is unavailable when required during the evaluation period, the Proponent may provide the name and email address of an alternate contact person from the same client.
  - Proponents will only be provided with this opportunity once for each client, and only if the originally named individual is unavailable to respond (i.e., the Proponent will not be provided with an opportunity to submit the name of an alternate contact person if the original contact person indicates that he or she is unwilling or unable to respond).
  - The five (5) working days will not be extended to provide additional time for the new contact to respond. Only two (2) attempts will be made to schedule the client for a reference check.
- e. Points will not be allocated and a proponent may not meet the experience requirement (as applicable) if (1) the reference client states he or she is unable or unwilling to provide the information requested, or (2) the client reference is not a customer of the Proponent itself (for example, the customer cannot be the customer of an affiliate of the Proponent instead of being a customer of the Proponent itself).
- f. No points will be allocated if the client is itself an affiliate or other entity that does not deal at arm's length with the Proponent.

**D.3.7.1 Client Reference Questions**

For each Service Category, IT Shared Services will be contacting the three references provided and asking the following questions:

1. Has the above referenced project reached substantial completion? (circle one) Yes No
2. What type of service was provided? (see list in D.1) \_\_\_\_\_
3. Provide a brief description of the project.
4. On a scale of 1 to 5 (1 being poor, 5 being Excellent) how would you rate this company's performance on the following:
  - a. How would you rate work performed by this firm on your project? \_\_\_\_\_
  - b. Was the project completed on time? \_\_\_\_\_
  - c. Was the project completed within budget? \_\_\_\_\_
  - d. What was the quality of the work performed? \_\_\_\_\_
  - e. Was staff proactive in solving problems that may have occurred on your project? \_\_\_\_\_
  - f. What was the extent of staff turnover? (5 = low staff turnover, 1 = high staff turnover) \_\_\_\_\_
  - g. Would you be willing to contract with this firm again? (5 = Yes, 1 = No) \_\_\_\_\_
5. What were the key benefits of using this company? (5 points)
6. What were the key challenges of using this company? (5 points)



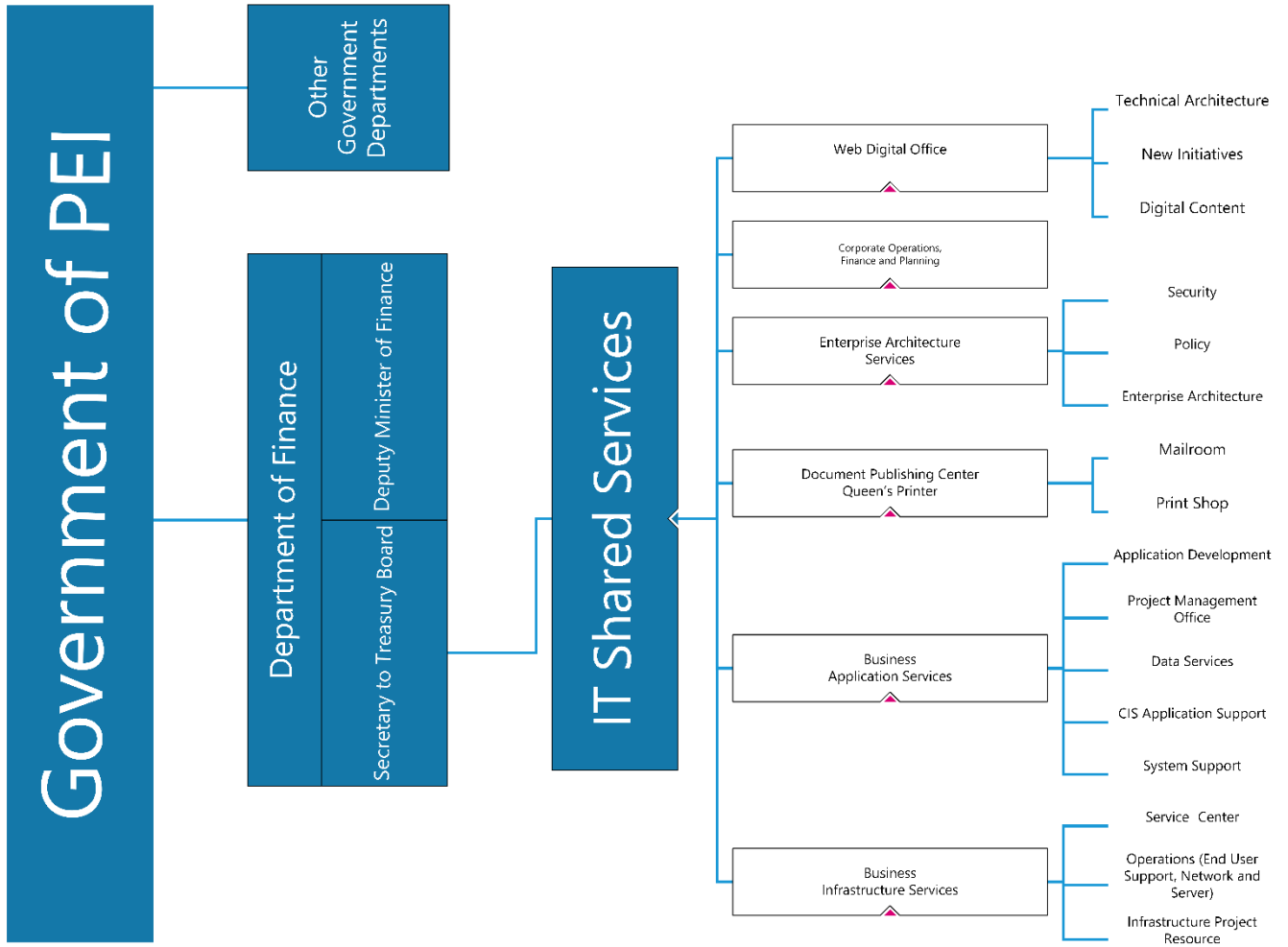
## APPENDIX E – COMMON TECHNOLOGIES

Though not all inclusive, the following table lists technologies used by the Province of PEI. Contracted IT professionals will require skills appropriate for a given work assignment.

DEVELOPMENT		WEB	DATABASE
.NET	MYSQL	Adobe Acrobat	Informix
ACCPAC	ODBC	Apache	MS SQL
Active X ADS/O	Oracle	Graphics Design	MYSQL
ASP	Oracle Discoverer	MS Expressions	Oracle
C++	Oracle Financials	Photoshop	Oracle Application
Cerner Command Language	Oracle PSP/Forms	Sharepoint	Server Oracle
CICS	Peoplesoft	Kubernetes	Financials
Cobol	Perl	Docker	OS Scripting for Linux
Cognos	PHP	Helchart	OS Scripting for
Crystal Reports	PL/SQL	Kong	Windows OS Scripting
ExtJS	PowerBuilder	Comunda	for AIX
HTML	PSP	GraphQL	SQL Server
IBM DB2	SQLE	Solr	
IDMS	SQL Server	Memcached	
Impromptu	SQL Windows Unix	Varnish	
J2EE Java	Spring	TomCat	
JCL	VB.NET	Barracuda Load	
JSP	Visual Basic	Balancer	
MS Access	Visual C++	Icinga2	
MS SQL	XML	Galera	
MVC	Active X	CEPH	
Cascading Style Sheets	Groovy	Nginx	
Java JavaScript	Angular	GitLab	
Saas	Json	Jenkins	
	SpringBoot	ConfigHub	
		Konga	
		Sentry	
		SonarQube	

OS/ Security/ Networking		ERP	GIS
Cisco Technologies	Radius Server	Crystal Reports	CGI
IBM AIX	Red Hat Enterprise Linux	Impromptu	GIS Product Suite HTML
Juniper Technologies	RSA Ace Server	Oracle	JavaScript Perl
Microsoft Exchange Enterprise	Sharepoint Server	Peoplesoft	
CheckPoint Technologies		CA Unicenter	
Windows Server		Solarwinds Web Helpdesk	
SERVER / STORAGE INFRASTRUCTURE			
EMC – VNX	Groupwise Email		Unix / Linux
Data Domain	BlackBerry Enterprise Server		Exchange / O365
OTHER			
Fusion	Microsoft Powerpoint	Microsoft Word	Subversion
Microsoft Excel	Microsoft Project	Oracle Financials	TRIM
	Microsoft Visio	SOA technologies	VMWare Sphere

## APPENDIX F – IT SHARED SERVICES ORGANIZATIONAL CHART



## APPENDIX G – SAMPLE STATEMENT OF WORK

**Statement of Work # 0001  
For a CCNA Network Resource  
To Assist with the Day-to-Day Operations  
and Projects  
For the Province of Prince Edward Island**

The purpose of this document is to confirm the agreement under which the chosen Proponent will provide the information technology services detailed in this document (“Services”) to Province of PEI (“Customer”). This document sets out the fees and expenses, responsibilities, assumptions, dependencies and contingencies governing the Services, as well as the work products to be delivered as a result of the Services.

### **BACKGROUND**

Province of PEI is looking to augment its network team in the day-to-day operations and for various projects.

### **SCOPE OF THE SERVICES**

The scope of this Service is the provision of a Cisco Network resource to augment its network team in the day-to-day operations and various projects. These services will start on xxxx xx, 20xx, ending on xxxx xx, 20xx.

Please note that resourcing will not be required on statutory holidays occurring in this date range.

### **PROPONENT QUALIFICATIONS**

The Proponent should have the outlined certifications or considerable experience as network resource and the installation of Cisco networking equipment. At a minimum, the candidate must have a current CCNA certification with three (3) years relevant experience.

The Proponent must be able to sign an agreement of confidentiality, in order to insure that no information learned through the performance of any work on behalf of the Province of PEI can be used in aid of another party or disclosed in any way without the expressed permission of IT Shared Services.

### **PROPONENT RESPONSIBILITIES**

- Working with IT Shared Services staff, assist with the day-to-day operations of the Province of PEI Network.
- Working with IT Shared Services staff, assist with Province of PEI projects.
- The Infrastructure Network Services role will assist IT Shared Services in the completion of site surveys, configuration of devices in LAN and WAN environments and network component elements including firewall, VPN services, IDS, content filtering, etc.
- Infrastructure network services will also involve the planning and implementation of network assets in a LAN/WAN environment.
- Monitoring and evaluating quality of network services.

### **CUSTOMER RESPONSIBILITIES**

The Customer will provide the Proponent with, as reasonably necessary:

- Access to and use of the Customer’s systems, facilities, workspace, office services, and other resources;
- Access to and support from qualified personnel; and
- *All work is to be done onsite at 40 Burns Avenue, or other Province of PEI facilities as directed by IT Shared Services.*

**ASSUMPTIONS**

The parties agree to cooperate in good faith for the consulting services to be provided successfully.

**FEES AND EXPENSES**

Time and Materials:

All prices are to include travel and lodging.

The Proponent will provide to the Customer and the Customer will pay Proponent for the number and type of Proponent resources listed below to perform the Services at the respective rates indicated.

Number and Type of Resource	Per Diem Rate

Should you have any questions regarding this Agreement, please do not hesitate to contact XXX XXXXX at XXX-XXX-XXXX or email [XXXX@gov.pe.ca](mailto:XXXX@gov.pe.ca) at any time.

Acknowledged and Agreed by  
Proponent  
By: \_\_\_\_\_

Name in Print: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Acknowledged and Agreed by  
Customer  
By: \_\_\_\_\_

Name in Print: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

## APPENDIX H – DECLARATION OF CONTRACT INTENTIONS

The successful proponent(s) will be expected to sign a legal agreement with the Province that will govern all aspects of the services to be delivered. While the Province has offered a contract (Appendix A) for this purpose, alterations that the Proponent wishes to request in its proposal may be given consideration, in accordance with Section 4.5.

The proponent should prepare a declaration to inform the Province of its intentions regarding the contract, as shown below. This should be prepared as a short document (preferably on a single page) and should be included in the proposal. **The declaration does not need to be signed.**

Declaration of Contract Intentions
<p>RFP #:</p> <p>By signing the Submission Form (Appendix B) the proponent has duly noted and agrees to the terms of the standard services contract referenced in the RFP document.</p> <p>Check ✓ only one:</p> <p><input type="checkbox"/> If accepted as a successful proponent for this RFP, the proponent accepts the contract terms and will sign the contract without changes.</p> <p><input type="checkbox"/> If accepted as a successful proponent for this RFP, the proponent accepts the contract terms with the alterations identified below. The proponent understands the consequences of requesting these changes and that the Province may need to discuss these with the proponent before a final contract can be prepared or award of SOW for deduction of merits:</p> <ul style="list-style-type: none"><li>○ &lt;describe desired alteration&gt;</li><li>○ &lt;describe desired alteration&gt;</li><li>○ &lt;describe desired alteration&gt; etc.</li></ul>

## APPENDIX I - SERVICE CATEGORIES

Roles and responsibilities within IT Shared Services division can be grouped into the following service categories. Within these service categories are junior, intermediate and senior levels of experience.

### Category 1 - Project Management Services

**The Project Management Services category encompasses the initiation, planning, executing, controlling, and closing of IT projects.**

This service category includes, but is not limited to:

- Work with the Project stakeholders to develop, implement and maintain structures for project governance and decision-making;
- Define project objectives and selecting the most appropriate path or plan in order to satisfy project objectives;
- Develop project requirements, scope and deliverables and ensuring the appropriate approvals are in place before proceeding with the project;
- Define, estimate and plan project tasks, resources, timelines and milestones;
- Develop and implement a project management and implementation strategy;
- Develop, maintain, execute, and monitor project plans;
- Develop and monitor budgets, allocations and/or expenditures;
- Identify, document, report and mitigate project risks and issues;
- Perform change management practices to achieve project deliverables;
- Manage the project communication and reporting process via status reports, meetings, and other methods as required for monitoring and accountability purposes;
- Ensure the completion and quality of project documentation, deliverables and obtaining the necessary sign-offs;
- Ensure an operational plan is established and approved;
- Transition the project to the appropriate Operational team within IT Shared Services; and
- Other work relevant to the service category as required.

Only Intermediate (4 – 7 years experience) and Senior (7+ years experience) consultants will be considered for this category.

## Category 2 - Business Analyst Services

**The Business Analyst Services category encompasses the identification of business needs, gathering of requirements and recommending solutions to provide business value.**

This service category includes, but is not limited to:

- Organize and facilitate requirements elicitation sessions with project stakeholders, team members and end users. Prepare elicitation documents where required (e.g., survey questions);
- Liaise with the business and technology stakeholders to facilitate the development of the business requirements into solutions;
- Translate the business requirements into Functional and Non-functional requirements;
- Determine feasibility of the business requirements and alignment to business needs;
- Troubleshoot and resolve problems by analyzing and developing new approaches to existing practices;
- Collect and analyze information and present findings on complex issues;
- Research best practice and incorporate into analysis;
- Estimate time and resource requirements associated with an initiative (human, financial);
- Perform analysis on project initiatives by applying various analysis techniques such as SWOT, ROI, Gap analysis and feasibility studies;
- Conduct requirements review walkthrough sessions with user experience/design, technology and end users;
- Review applicable technology prototypes;
- Assist with the development, issuance, and evaluation of Requests for Proposals (RFP) for technology solutions;
- Create User Stories and Use Case documents;
- Create User Acceptance Test Plan and User Acceptance Test Cases where required;
- Create Requirements Documentation inclusive of requirements, scope, project objectives, business problems and/or opportunities, solution context, functional, non-functional and data requirements;
- Create Process Flow diagrams; and
- Other work relevant to the service category as required.



## Category 3 – Analysis/Programming Services

**The Analysis/Programming Services category combines investigative, analytical, and design skills with the ability to use software tools and programming languages to produce and implement properly engineered and tested software solutions.**

**The programmer analyst's role is to act as the senior resource responsible for the collaborative development, deployment, and support of new and existing large-scale, multi-tiered applications using appropriate tools and technologies while assisting in the development of standards and procedures.**

**The programmer analyst is expected to know and follow organizational lifecycle management, integrating new and emerging technologies and add-ons, and apply best practices in application design and development.**

This service category includes, but is not limited to:

- Modify existing code or creating new programs in accordance with approved design specifications, best coding practices, technical guidelines, to ensure high quality and performance of the resulting module(s);
- Work with various stakeholders to develop and document the technical design for applications;
- Integrate line of business applications with ERP/Financial Systems;
- Build software releases from multiple development project streams and manage multiple tier deployment environments;
- Perform full application upgrades and patch within a full stack environment;
- Troubleshoot and perform root cause analysis to solve problems in an integrated environment;
- Provide effort estimates/timelines for complex new development projects and application upgrades;
- Explain complex technical issues to both technical and non-technical audiences;
- Lead meetings and make technical presentations with confidence;
- Write APIs and Web Services with clear, consistent, simple to use interfaces;
- Develop applications for multiple tier deployment environments (Dev, QA, Staging, and Production);
- Build a continuous delivery pipeline with GIT source control management and Jenkins automation server;
- Develop applications using the Software Development Life Cycle framework; and
- Other work relevant to the service category as required.

SOW issued will identify the specific tools and technologies that may be an asset.

The level of experience required may also be identified I.E. Only Intermediate (4 – 7 years experience) and Senior (7+ years experience) consultants will be considered for this SOW.

## Category 4 - IT Management Consulting

**The IT Management Consulting Services category is used to assist Departments and IT Shared Services in evolving an IT model that will support the varied needs of IT Shared Services.**

This service category includes, but is not limited to:

- Plan, develop, and implement IT Service Portfolio/Service Catalog;
- Participate in IT strategic, tactical, and operational planning;
- Develop Departmental IT roadmaps;
- Develop and implement IT Governance modelling;
- Manage IT assessments;
- Develop IT policy and procedures;
- Manage vendor contracts; and
- Other work relevant to the service category as required.

Only Intermediate (4 – 7 years experience) and Senior (7+ years experience) consultants will be considered for this category.

## Category 5 - IT Enterprise Architecture Services

**The IT Enterprise Architecture Services category incorporates the planning and development of application/function, data, and technical requirements that will support the business goals of an organization. Enterprise Architecture defines the blueprint, style, and method of design and construction for an organization's technology solutions.**

This service category includes, but is not limited to:

- Analyze business needs and requirements;
- Model and automate business processes;
- Transform business requirements into an object model and workflow design;
- Evaluate and select software and hardware;
- Develop high-level and detailed application design specifications;
- Perform design and code reviews;
- Develop frameworks for new applications;
- Define application development standards including the recommended use of languages and tools;
- Specify data modelling and database development technologies and techniques;
- Develop high-level schemas for business applications; and
- Other work relevant to the service category as required.

Only Intermediate (4 – 7 years experience) and Senior (7+ years experience) consultants will be considered for this category.

## Category 6 - IT Emergency Management, Business Continuity Management, and Disaster Recovery Services

**The IT Emergency Management (EM), Business Continuity Management (BCM) & Disaster Recovery (DR) service category supports these requirements by establishing, developing, and implementing plans, recovery strategies, procedures, and technical measures which will enable ITSS to effectively: prevent/mitigate, prepare for, respond to, and recover from a service disruption or disaster affecting IT systems, critical services (Email, Web Hosting, etc.), and/or critical infrastructure (WAN, Data Centres, Firewalls, Internet lines, generators, etc.).**

This service category includes, but is not limited to:

- Work with internal stakeholders (technical and business) to document essential and critical services, foundational infrastructure, ongoing and emergency processes, etc.;
- Conduct Hazard Risk Vulnerability Assessments (HRVA) and Business Impact Analysis (BIA);
- Identify and assist in implementing mitigation and preparedness strategies;
- Facilitate and deliver training curriculum related to EM, BCM, and DR services;
- Analyze and evaluate emergency operations, design and facilitate exercises, by conducting lessons learned seminars, and writing After-Action Reports related to Emergency Planning;
- Develop and refine BCM and DR plans related to critical services and infrastructure such as WAN services, hosted server and application services, data center and WAN environments and supporting infrastructure such as generators (I.E. generator fueling intervals, cooling maintenance frequency, etc.);
- Implement and test EM, BCM, and DR plans and solutions;
- Develop recovery strategies and procedures;
- Audit BCM and DR plans;
- Consult with internal and external stakeholders to document details related to services, systems, vendors, employees, sites, infrastructure, etc; and
- Other work relevant to the service category as required.

## Category 7 - IT Security Systems and Infrastructure Services

**IT Shared Services implements security components into the network environment to support a growing need for external connectivity. Components include firewall, VPN services, IDS, content filtering, etc.**

This service category includes, but is not limited to:

- Assist with research and evaluation of products and services;
- Assist the technical team to define and detail requirements;
- Assist with the planning, design, and implementation of security solutions and components;
- Provide consultation on direction and strategies related to security components;
- Provide consultation on best practices and new technologies;
- Provide technical expertise and knowledge on security solutions;
- Provide consultation and advisement on evaluating business requirements and implementing solutions within a health care environment;
- Perform updates to server operating systems;
- Administrate and unify security management across endpoints and networks, using McAfee ePolicy Orchestrator;
- Implement intrusion detection systems using Checkpoint firewalls;
- Implement VPN technology using Checkpoint VPN;
- Follow project management methodologies when managing projects; and
- Other work relevant to the service category as required.

## Category 8 - IT Network Services

**The Network Services roles will assist in the completion of site surveys, configuration of devices in a LAN and WAN environments, and in the development of recommendations for infrastructure server environment improvements. Network component elements include firewall, VPN services, IDS, content filtering, etc. Infrastructure network services will also involve the planning and implementation of network assets in a LAN/WAN environment.**

This service category includes, but is not limited to:

- Design, analyse, and recommend network based solutions and systems;
- Install, configure, maintain, and manage OSI layer 1 through 7 technology including physical cabling, switching, routing, Quality of Service, Software Defined networking, DNA Centre, MPLS circuits, load balancers, etc.;
- Configure Cisco Prime Infrastructure, Cisco 5700 Controllers , Cisco ICE, Cisco ACE, Cisco Airnet Wireless Access Points; Cisco Nexus 7k & 9K, and Cisco Meraki MDM;
- Configure wireless (Motorola, Cambium) point-to-point;
- Monitor and evaluate quality of network services;
- Install and design fiber networks utilizing Raisecom, Transition Networks, and BTI equipment;
- Install Belden cabling; and
- Other work relevant to the service category as required.

## Category 9 - IT Server Services

**The Infrastructure Server Services role will assist ITSS in the configuration of discrete servers and servers in a VMWare virtualized environment and in the development of recommendations for infrastructure server environment improvements. Server component elements include active directory, domain management, virtualized (VMware) environments, Remote Desktop Technologies, SAN technology, MS Windows 2008+.**

This service category includes, but is not limited to:

- Design, analyse, and recommend server based solutions and systems;
- Deploy and configure servers;
- Implement and maintain an Active Directory MS 2012 environment;
- Implement and maintain server operating systems, including but not limited to Microsoft Server 2003 through 2019, Red Hat Linux, Ubuntu Linux, Oracle Unbreakable Linux, etc.;
- Implement and maintain EMC (VNX, Data Domain, Isilon, ECS) storage environments;
- Implement and maintain Citrix XenApp, and Microsoft Remote Desktop Services;
- Implement and maintain a Groupwise and BlackBerry environment;
- Implement and maintain a Microsoft Exchange environment;
- Implement, maintain, and administer Microsoft and Microsoft Modern Workforce solutions such as SharePoint, Azure, Skype, Teams, etc.;
- Implement and maintain Barracuda gateway technologies (load balancing & email filtering);
- Implement and maintain coexistence software including but not limited to Quest; and
- Other work relevant to the service category as required.

## Category 10 - IT End User Support

**The End User Support role includes infrastructure installation, configuration, and maintenance for desktop, laptop, tablet and print/copy assets.**

This service category includes, but is not limited to:

- Install and configure Microsoft products including Windows (XP, 7, 10), Office (2003+) ;
- Deploy software systems including software package preparation;
- Deploy PC OS systems, including OS preparation and customization;
- Compile reports regarding desktop, laptop, tablet and print/copy assets;
- Plan desktop implementations;
- Install, configure, and maintain desktop, laptop, tablet and print/copy assets;
- Troubleshoot issues with desktop, laptop, tablet and print/copy assets; and
- Other work relevant to the service category as required.



## Category 11 - Business Intelligence Services

**The Business Intelligence (BI) service category includes the design, configuration, and implementation of BI software and systems, including integration with databases and data warehouses. This includes selecting, blueprinting, gathering requirements, designing, and rolling out BI solutions to Government end users.**

This service category includes, but is not limited to:

- Provide advice and assistance in BI implementation projects;
- Assist in systems integration efforts;
- Provide architectural direction and guidance in designing a multi-source data staging environment(s) for efficient analytics and reporting;
- Design, code, test, and document BI applications;
- Develop data extracts, data sets, and/or data universes;
- Design information reports and/or dashboards;
- Assist in the design of databases and data warehouses to ensure interoperability with BI solutions;
- Design functional specifications for BI front-end applications;
- Produce best practice BI guidelines;
- Troubleshoot BI tools, systems, and software;
- Produce data models, database designs and configurations, and data Architectural Blueprint(s).
- Follow project management methodologies when managing projects; and
- Other work relevant to the service category as required.

## Category 12 - IT Security Audit and Policy Services

**The IT Security Audit and Policy Services category encompasses services to assist departments and IT Shared Services in evaluating and making recommendations on the improvement of the security of the PEI Government network, its systems, and applications.**

This service category includes, but is not limited to:

- Perform physical, network, and application security audit;
- Review Government IT security policy;
- Utilize the RCMP Harmonized Threat and Risk Assessment Methodology;
- Utilize ISO 17799 Information Security Standard;
- Assist ITSS with realigning services to best meet client demand; and
- Other work relevant to the service category as required.

## Category 13 – Cerner Command Language (CCL)

**The Cerner Command Language (CCL) service category is specific to the Clinical Information System (CIS) and supports the efficient and accurate sharing of data and streamlining processes between physicians, nurses and other authorized users.**

This service category includes, but is not limited to:

- Provide Cerner CCL (Cerner Command Language) programming and report writing services for a number of Cerner clinical solutions;
- Develop rules using Discern EKM Development tool;
- Create Discern Explorer programs using advanced record structure concepts;
- Utilize Cerner's Layout Builder and Discern Visual Developer tools; and
- Other work relevant to the service category as required.

## Category 14 – Mobile Environment Support

**The mobile environment support service category encompasses the infrastructure for the efficient and effective use of mobile technology. Individuals must be able to support an enterprise-based BlackBerry solution, including BlackBerry Enterprise Server and associated components.**

This service category includes, but is not limited to:

- Provide support and maintenance of the Blackberry Enterprise Server (BES);
- Provide support and maintenance for Microfocus (Novell) GroupWise email mobility infrastructure;
- Provide support and maintenance for Mobile Device Management (MDM) systems including UEM, and Meraki;
- Install, configure and manage BlackBerry Enterprise Server software in an enterprise environment;
- Provide support for end-users in BlackBerry Internet Service or enterprise-based BlackBerry solution, including BlackBerry Enterprise Server and associated components;
- Employ Unified Communication (UC) strategies; and
- Other work relevant to the service category as required.

## Category 15 – Lean Six Sigma Mentorship / Training

**The Lean Six Sigma category encompasses the training, mentoring, and certifying Lean Six Sigma yellow, green belt and black belts.**

This service category includes, but is not limited to:

- Provide access to ASQ certified on-line training;
- Deliver in-person training at the yellow, green and black belt levels;
- Provide leadership development to support the creation of a lean culture, including the implementation of leadership standard work;
- Support the development of a robust communication plan to enable continued engagement throughout the project life cycle;
- Build additional lean capacity by training departmental staff and management on lean six sigma methodology at yellow, green, and black belt levels as appropriate;
- Train participating staff in system project improvement based on Lean/Six Sigma methodology and application of “train the trainer” model;
- Provide black belt support to lead key lean initiatives, and mentor existing green belts in the implementation of key lean projects in other parts of the project to achieve black belt status as required by the organization;
- Build additional capacity for existing lean six sigma trained staff by mentoring them in the more advanced aspects of lean tools and methodologies applied in a large scale project. i.e. Kaizan events, Visual Management, Error Proofing, Demand Management Value Stream Mapping;
- Develop, in consultation with management VSM, metrics with a review, update, and validation annually;
- Mentor candidate practitioners during training and skills development;
- Meet regularly with candidate practitioners (in person and via conference) to support progress;
- Accredite candidates at the various levels of lean training; and
- Other work relevant to the service category as required.

Only Intermediate (4 – 7 years experience) and Senior (7+ years experience) consultants will be considered for this category.

## Category 16 – Change Management

**The Change Management category encompasses development, implementation, and consultation related to IT change management.**

This service category includes, but is not limited to:

- Create change management plans aimed at improving organizational effectiveness through system-centered change;
- Develop and implementing change management strategies, plans, framework;
- Provide expertise, consultative advice, guidance and coaching in terms of change management strategies and related tools;
- Evaluate the effectiveness of the change management initiative; and
- Other work relevant to the service category as required.

Only Intermediate (4 – 7 years experience) and Senior (7+ years experience) consultants will be considered for this category.

## Category 17 – Digital Government Services

**The Digital Government Services category includes the development of government process, people and technology to provide citizens with more and better digital (online) access to government services. The services are guided by the principles of citizen-centric and digital-by-design.**

This service category includes, but is not limited to:

- Assist in the design of Digital Government, including standards, procedures and guidelines, strategies, roadmaps and implementation plans;
- Assist with the review and establishment of legislation, policies and standards to allow government's public administration, citizens and businesses to fully realize the opportunities offered by Digital Government;
- Assist with the development of a digital service delivery model for Digital Government.
- Assist in the development of Digital Government skills and capabilities of employees within government
- Assist in the development of methods of engaging with citizens to seek their input and feedback on government transformation and the promotion and education of services to increase digital adoption and literacy;
- Assist in the development of partnerships with various stakeholders to enable an effective Digital Government;
- Advise on the required Privacy and Security practices to support Digital Government and safeguard citizens information;
- Assist with the development of applications to enable Digital Government;
- Provide advice concerning current and emerging technologies and issues (e.g., disruptive technology – biotechnology, intelligence/cognitive augmentation, foresight, evaluation and measurement, networks and communities, governance) in support of Digital Government; and
- Other work relevant to the service category as required.

## Category 18 – Telecommunications

**The Telecommunications service category includes the configuration, deployment, and support of a wide variety of telecommunication devices and technologies including mobile phones, analog and digital telecommunication technologies, cellular devices, and Unified Communication devices and systems.**

This service category includes, but is not limited to:

- Planning, organizing, and coordinating the installation, relocation, removal, and maintenance of telecommunications equipment/systems;
- Providing support and guidance for telephones, telephone systems, cellular phones, pagers, mobile radios, and data lines;
- Creating work orders for the installation, removal, or relocation of telecommunications equipment, billing charges, and proper programming;
- Participating in the implementation and maintenance of Unified Communications (UC);
- Providing second level support to the Service Desk for Telecommunications problems;
- Ensuring the care and custody of telecommunications equipment (desk phones, pagers, cellular etc.);
- Assisting in the development of a telecommunications work process flow using CA unicenter ticketing system;
- Work with telecommunication service providers to manage assets, and change requests;
- Implementing special telecommunications projects, as required;
- Providing training to users; and
- Other work relevant to the service category as required.



## Category 19 – Health IT Consulting Services

**The Health Information Technology Consulting Services category is used to assist the Province in evolving its digital health footprint. Digital health refers to the use of information technology, services and processes to deliver health care services or to facilitate better health care.**

This service category provides experience and expertise in the following areas, but is not limited to:

- Digital Health and national health IT trends;
- Health planning and governance;
- Health specific integration;
- Clinical solution implementation;
- Clinical adoption and change management;
- Clinical process improvement;
- Infoway's IEHR blueprint, Pan-Canadian Standards, and CIHI standards; and
- Other work relevant to the service category as required.

Note: Some of the Proponents within this category may also be eligible under other services categories and the Province will be as inclusive as possible when issuing the health related statements of work.

## APPENDIX J – COMPANY OVERVIEW, PROJECT PROFILE AND REFERENCES

Use the spreadsheet attached as Schedule J.1 Company Overview, Project Profile and References to provide three references per Service Category.