



THE CITY OF WINNIPEG

REQUEST FOR PROPOSAL

RFP NO. 192-2008

PROVISION OF A CONSOLIDATED 311 SERVICE

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PART B - BIDDING PROCEDURES

B1. CONTRACT TITLE

B1.1 PROVISION OF A CONSOLIDATED 311 SERVICE

B2. SUBMISSION DEADLINE

- B2.1 The Submission Deadline is 4:00 p.m. Winnipeg time, March 20, 2008.
- B2.2 Proposals determined by the Manager of Materials to have been received later than the Submission Deadline will not be accepted and will be returned upon request.
- B2.3 The Contract Administrator or the Manager of Materials may extend the Submission Deadline by issuing an addendum at any time prior to the time and date specified in B2.1.

B3. BACKGROUND AND INTRODUCTION

- B3.1 The City is seeking to meet the ever changing needs of its citizens and have identified the following primary operational objectives for this initiative:
- (a) Enhance services and information to citizens through:
 - (i) Providing 24X7 year-round access to request information or services from the City of Winnipeg;
 - (ii) Creating one point of contact or a "front door" by consolidating existing call centres or contact points for citizens; and,
 - (iii) Implement leading call centre technology to facilitate the efficient and effective resolution of the call.
 - (b) Improve the City's capability to manage services with better understanding of citizen needs and issues.
- B3.2 The City looks forward to working with an implementation partner that will present the City with resources and methodology to facilitate a collaborative implementation effort utilizing City resources in such a manner that a successful transition to sustaining the implementation efforts is ensured. The City has the following milestone events planned;
- (a) Making available a physical Contact Centre facility in July, 2008;
 - (b) A two week implementation shutdown for City staff in mid-August, 2008;
 - (c) Having the ability to begin taking selected SRs and IRs in October, 2008;
 - (d) Being fully operational in January, 2009 with the scope of SRs and IRs as noted in E2.

B4. ENQUIRIES

- B4.1 All enquiries shall be directed to the Contract Administrator identified in D4.1.
- B4.2 If the Bidder finds errors, discrepancies or omissions in the Request for Proposal, or is unsure of the meaning or intent of any provision therein, the Bidder shall promptly notify the Contract Administrator of the error, discrepancy or omission at least five (5) Business Days prior to the Submission Deadline.
- B4.3 If the Bidder is unsure of the meaning or intent of any provision therein, the Bidder should request clarification as to the meaning or intent prior to the Submission Deadline.
- B4.4 Responses to enquiries which, in the sole judgment of the Contract Administrator, require a correction to or a clarification of the Request for Proposal will be provided by the Contract Administrator to all Bidders by issuing an addendum.

B4.5 Responses to enquiries which, in the sole judgment of the Contract Administrator, do not require a correction to or a clarification of the Request for Proposal will be provided by the Contract Administrator only to the Bidder who made the enquiry.

B4.6 The Bidder shall not be entitled to rely on any response or interpretation received pursuant to B4 unless that response or interpretation is provided by the Contract Administrator in writing.

B5. CONFIDENTIALITY

B5.1 Information provided to a Bidder by the City or acquired by a Bidder by way of further enquiries or through investigation is confidential. Such information shall not be used or disclosed in any way without the prior written authorization of the Contract Administrator.

B5.2 The Bidder shall not make any statement of fact or opinion regarding any aspect of the Request for Proposal to the media or any member of the public without the prior written authorization of the Contract Administrator.

B6. LIMITATIONS ON COMMUNICATION

B6.1 Any attempt on the part of any Bidder or any of its employees, agents, contractors or representatives to contact and/or lobby any of the City's external advisors, any member of City Administration other than the individual designated for enquiries herein, or any member of City Council or their staff, with respect to this RFP may lead to disqualification.

B7. ADDENDA

B7.1 The Contract Administrator may, at any time prior to the Submission Deadline, issue addenda correcting errors, discrepancies or omissions in the Request for Proposal, or clarifying the meaning or intent of any provision therein.

B7.2 The Contract Administrator will issue each addendum at least two (2) Business Days prior to the Submission Deadline, or provide at least two (2) Business Days by extending the Submission Deadline.

B7.2.1 Addenda will be available on the Bid Opportunities page at The City of Winnipeg, Corporate Finance, Materials Management Branch internet site at <http://www.winnipeg.ca/matmgt>.

B7.2.2 The Bidder is responsible for ensuring that he has received all addenda and is advised to check the Materials Management Branch internet site for addenda regularly and shortly before the Submission Deadline, as may be amended by addendum.

B7.3 The Bidder shall acknowledge receipt of each addendum in Paragraph 9 of Form A: Proposal. Failure to acknowledge receipt of an addendum may render a Proposal non-responsive.

B8. BIDDER'S COSTS AND EXPENSES

B8.1 Bidders are solely responsible for their own costs and expenses in preparing and submitting an RFP submission and participating in the RFP process including the provision of any additional information or attendance at meetings.

B9. SUBSTITUTES

B9.1 The Work is based on the Plant, Materials and methods specified in the Request for Proposal.

B9.2 Substitutions shall not be allowed unless application has been made to and prior approval has been granted by the Contract Administrator in writing.

B9.3 Requests for approval of a substitute will not be considered unless received in writing by the Contract Administrator at least five (5) Business Days prior to the Submission Deadline.

- B9.4 The Bidder shall ensure that any and all requests for approval of a substitute:
- (a) provide sufficient information and details to enable the Contract Administrator to determine the acceptability of the Plant, Material or method as either an approved equal or alternative;
 - (b) identify any and all changes required in the applicable Work, and all changes to any other Work, which would become necessary to accommodate the substitute;
 - (c) identify any anticipated cost or time savings that may be associated with the substitute;
 - (d) certify that, in the case of a request for approval as an approved equal, the substitute will fully perform the functions called for by the general design, be of equal or superior substance to that specified, is suited to the same use and capable of performing the same function as that specified and can be incorporated into the Work, strictly in accordance with the proposed work schedule and the dates specified in the Supplemental Conditions for Substantial Performance and Total Performance;
 - (e) certify that, in the case of a request for approval as an approved alternative, the substitute will adequately perform the functions called for by the general design, be similar in substance to that specified, is suited to the same use and capable of performing the same function as that specified and can be incorporated into the Work, strictly in accordance with the proposed work schedule and the dates specified in the Supplemental Conditions for Substantial Performance and Total Performance.
- B9.5 The Contract Administrator, after assessing the request for approval of a substitute, may in his sole discretion grant approval for the use of a substitute as an “approved equal” or as an “approved alternative”, or may refuse to grant approval of the substitute.
- B9.6 The Contract Administrator will provide a response in writing, at least two (2) Business Days prior to the Submission Deadline, only to the Bidder who requested approval of the substitute.
- B9.6.1 The Bidder requesting and obtaining the approval of a substitute shall be entirely responsible for disseminating information regarding the approval to any person or persons he wishes to inform.
- B9.7 If the Contract Administrator approves a substitute as an “approved equal”, any Bidder may use the approved equal in place of the specified item.
- B9.8 If the Contract Administrator approves a substitute as an “approved alternative”, any Bidder bidding that approved alternative may base his Total Bid Price upon the specified item but may also indicate an alternative price based upon the approved alternative. Such alternatives will be evaluated in accordance with B26.2.
- B9.9 No later claim by the Contractor for an addition to the Total Bid Price because of any other changes in the Work necessitated by the use of an approved equal or an approved alternative will be considered.

B10. PROPOSED TIMETABLE OF EVENTS

Activity	Time Frame
RFP Distributed to Bidders	February 29, 2008
RFP Submission Deadline -Responses Received	March 20, 2008
Evaluation Stage 1	March 21 - 28, 2008
Evaluation Stage 2 -Product Demos, Presentations	April 7 - 11, 2008
Negotiations & Due Diligence	April 14 - 18, 2008

B10.1 Notwithstanding any other section of this document, The City of Winnipeg may, in its sole discretion, at any time by written notice, terminate the RFP process. After termination as described above, the City will be under no obligation to any Bidder.

B11. PROPOSAL FORMAT

B11.1 Submissions shall be made in the prescribed format.

B11.2 Bidders shall submit **one (1) original** and **eight (8) paper copies** plus **one (1) copy in an MSOffice compatible electronic format** on a standard CD. If there is any discrepancy between the electronic version and the original hard copy, the original hard copy shall take precedence.

B11.2.1 Bidders may use their own discretion regarding the quantity of information and length of responses, but are strongly encouraged to be clear and concise in their responses and to adhere to the limits placed on responses to questions and requirements included in Contact Centre Requirements Questionnaire, Attachment B.

B11.3 All requests for information contained in this RFP must be answered as concisely as possible, while providing to the City all information necessary to understand and evaluate the Bidder's Proposal(s). Bidders are required to respond to this RFP using the forms provided and shall respond to all questions and requirements. Any requirements that cannot be satisfied by the Bidder must be clearly identified in the appropriate section.

B11.4 Proposals must be organized into separately labelled components as outlined in B12, in the format prescribed in B11.1 and B11.2. This is the format and minimum content that the Bidder's submission must contain in order to facilitate the City's evaluation.

B12. PROPOSAL SUBMISSION

B12.1 The Proposal shall consist of the following components:

- (a) Form A: Proposal;
- (b) Attachment A: Executive Summary;
- (c) Attachment B: 311 Contact Centre Requirements Questionnaire;
- (d) Attachment C: 311 Contact Centre Pricing Template;
- (e) Attachment D: Implementation Plans;
- (f) Attachment E: Resumes of Key Personnel; and,
- (g) Attachment F: Financial Statements and References

B12.1.1 As an **option** Bidders may also include:

- (h) Attachment G: Additional information outside of the scope of the preceding list, but which the Bidder deems relevant and necessary in order for the City to properly evaluate their submission shall be included as Attachment G to their submission.
- B12.2 Further to B12.1, the Bidder should include the written correspondence from the Contract Administrator approving a substitute in accordance with B9.
- B12.3 All components of the Proposal shall be fully completed or provided, and submitted by the Bidder no later than the Submission Deadline, with all required entries made clearly and completely, to constitute a responsive Proposal.
- B12.3.1 Proposal Submissions that do not conform with B12.1 may be determined to be non-responsive in accordance with B26.3, and may be rejected.
- B12.4 Bidders are advised that inclusion of terms and conditions inconsistent with the Request for Proposal document, including the General Conditions will be evaluated in accordance with B26.2(a).
- B12.5 Bidders are advised not to include any information/literature except as requested in accordance with B12.1.
- B12.6 The Proposal shall be submitted enclosed and sealed in an envelope clearly marked with the RFP number and the Bidder's name and address.
- B12.6.1 Samples or other components of the Proposal which cannot reasonably be enclosed in the envelope may be packaged separately, but shall be clearly marked with the RFP number, the Bidder's name and address, and an indication that the contents are part of the Bidder's Proposal Submission.
- B12.7 Proposals submitted by facsimile transmission (fax) or internet electronic mail (e-mail) will not be accepted.
- B12.8 Proposals shall be submitted to:
The City of Winnipeg
Corporate Finance Department
Materials Management Branch
185 King Street, Main Floor
Winnipeg MB R3B 1J1

B13. PROPOSAL

- B13.1 The Bidder shall complete Form A: Proposal, making all required entries.
- B13.2 Paragraph 2 of Form A: Proposal shall be completed in accordance with the following requirements:
- (a) if the Bidder is a sole proprietor carrying on business in his own name, his name shall be inserted;
 - (b) if the Bidder is a partnership, the full name of the partnership shall be inserted;
 - (c) if the Bidder is a corporation, the full name of the corporation shall be inserted;
 - (d) if the Bidder is carrying on business under a name other than his own, the business name and the name of every partner or corporation who is the owner of such business name shall be inserted.
- B13.2.1 If a Proposal is submitted jointly by two or more persons, each and all such persons shall identify themselves in accordance with B13.2.
- B13.3 In Paragraph 3 of Form A: Proposal, the Bidder shall identify a contact person who is authorized to represent the Bidder for purposes of the Proposal.

- B13.4 Paragraph 11 of Form A: Proposal shall be signed in accordance with the following requirements:
- (a) if the Bidder is a sole proprietor carrying on business in his own name, it shall be signed by the Bidder;
 - (b) if the Bidder is a partnership, it shall be signed by the partner or partners who have authority to sign for the partnership;
 - (c) if the Bidder is a corporation, it shall be signed by its duly authorized officer or officers and the corporate seal, if the corporation has one, should be affixed;
 - (d) if the Bidder is carrying on business under a name other than his own, it shall be signed by the registered owner of the business name, or by the registered owner's authorized officials if the owner is a partnership or a corporation.
- B13.4.1 The name and official capacity of all individuals signing Form A: Proposal shall be printed below such signatures.
- B13.4.2 All signatures should be witnessed, except where a corporate seal has been affixed.
- B13.5 If a Proposal is submitted jointly by two or more persons, the word "Bidder" shall mean each and all such persons, and the undertakings, covenants and obligations of such joint Bidders in the Proposal and the Contract, when awarded, shall be both joint and several.

B14. PRICES

- B14.1 The Bidder's price for the Work, as calculated on Attachment C: Pricing Template Summary Tab, should not exceed \$3,200,000.00 (MRST included) in Canadian funds.
- B14.2 The Bidder shall state a price in Canadian funds for each item of the Work identified on Attachment C: Pricing Template.
- B14.2.1 Notwithstanding C11.1.1, prices on Attachment C: Pricing Template shall not include the Goods and Services Tax (GST) or Manitoba Retail Sales Tax (MRST, also known as PST), which shall be extra where applicable.
- B14.3 Any quantities listed on Attachment C: Pricing Template are to be considered approximate only. The City will use said quantities for the purpose of comparing Proposals.
- B14.4 The quantities for which payment will be made to the Contractor are to be determined by the Work actually performed and completed by the Contractor, to be measured as specified in the applicable Specifications.

B15. EXECUTIVE SUMMARY

- B15.1 The executive summary shall highlight the key elements of the Bidder's submission including, but not limited to:
- (a) Relevant Experience;
 - (b) Key members of the implementation team;
 - (c) Highlight of transition and implementation strategy;
 - (d) Highlight key differentiators and unique aspects of their Proposal; and,
 - (e) Why the Bidder's solution is the most appropriate for the City

B16. BIDDER QUESTIONNAIRE

- B16.1 Attachment B –Contact Centre Requirements Questionnaire shall be fully completed with additional responses provided, and submitted by the Bidder in accordance with the instructions provided on the Attachment.

B17. REFERENCES

- B17.1 The Bidder shall include 2 (two) references for recent projects similar in size, scope and value for customers in North America. Each reference should consist of a company name, contact name, email address, phone number and a brief description of the project.
- B17.2 Reference checks will not be restricted to only those submitted by the Bidder, and may include organizations representing persons companies or individuals known to have done business with the Bidder.

B18. RESUMES AND REFERENCES OF KEY PERSONNEL

- B18.1 The Bidder shall identify key personnel for the 311 Contact Centre project implementation.
- B18.2 The Bidder shall provide resumes and three (3) references from similar projects for each individual.

B19. FINANCIAL STABILITY

- B19.1 The Bidder should include as Attachment F
- (a) Audited Financial Statements for the last (3) three years including 2007 or most current;
 - (b) An independent credit check (such as Dunn & Bradstreet); and,
 - (c) A one page summary detailing concentration of customers.
- B19.2 Further to B19.1 Bidders wishing to submit a non-disclosure agreement related to their audited financial statements must enclose the financial statement in a sealed envelope with the non-disclosure agreement attached to the outside. If the City in its sole discretion determines that the non-disclosure agreement is unacceptable, the submission may be determined non-responsive and the sealed envelope will be returned unopened.

B20. QUALIFICATION

- B20.1 The Bidder shall:
- (a) undertake to be in good standing under The Corporations Act (Manitoba), or properly registered under The Business Names Registration Act (Manitoba), or otherwise properly registered, licensed or permitted by law to carry on business in Manitoba, or if the Bidder does not carry on business in Manitoba, in the jurisdiction where the Bidder does carry on business; and
 - (b) be financially capable of carrying out the terms of the Contract; and
 - (c) have all the necessary experience, capital, organization, and equipment to perform the Work in strict accordance with the terms and provisions of the Contract.
- B20.2 The Bidder and any proposed Subcontractor (for the portion of the Work proposed to be subcontracted to them) shall:
- (a) be responsible and not be suspended, debarred or in default of any obligations to the City a list of suspended or debarred individuals and companies is available on the Information Connection page at The City of Winnipeg, Corporate Finance, Materials Management Branch internet site at <http://www.winnipeg.ca/matmgt>.
- B20.3 The Bidder and/or any proposed Subcontractor (for the portion of the Work proposed to be subcontracted to them) shall:
- (a) have successfully carried out work similar in nature, scope and value to the Work; and
 - (b) be fully capable of performing the Work required to be in strict accordance with the terms and provisions of the Contract; and

- (c) have a written workplace safety and health program, if required, pursuant to The Workplace Safety and Health Act (Manitoba);

B20.4 The Bidder shall submit, within three (3) Business Days of a request by the Contract Administrator, proof satisfactory to the Contract Administrator of the qualifications of the Bidder and of any proposed Subcontractor.

B20.5 The Bidder shall provide, on the request of the Contract Administrator, full access to any of the Bidder's equipment and facilities to confirm, to the Contract Administrator's satisfaction, that the Bidder's equipment and facilities are adequate to perform the Work.

B21. OPENING OF PROPOSALS AND RELEASE OF INFORMATION

B21.1 Proposals will not be opened publicly.

B21.2 After award of Contract, the name(s) of the successful Bidder(s) and the Contract Amount(s) will be available on the Closed Bid Opportunities (or Public/Posted Opening & Award Results) page at The City of Winnipeg, Corporate Finance, Materials Management Branch internet site at <http://www.winnipeg.ca/matmgt>.

B21.3 To the extent permitted, the City shall treat all Proposal Submissions as confidential, however the Bidder is advised that any information contained in any Proposal may be released if required by City policy or procedures, by The Freedom of Information and Protection of Privacy Act (Manitoba), by other authorities having jurisdiction, or by law.

B21.4 Following the award of Contract, a Bidder will be provided with information related to the evaluation of his submission upon written request to the Contract Administrator.

B22. IRREVOCABLE OFFER

B22.1 The Proposal(s) submitted by the Bidder shall be irrevocable for the time period specified in Paragraph 10 of Form A: Proposal.

B22.2 The acceptance by the City of any Proposal shall not release the Proposals of the other responsive Bidders and these Bidders shall be bound by their offers on such Work until a Contract for the Work has been duly executed and the performance security furnished as herein provided, but any offer shall be deemed to have lapsed unless accepted within the time period specified in Paragraph 10 of Form A: Proposal.

B23. WITHDRAWAL OF OFFERS

B23.1 A Bidder may withdraw his Proposal without penalty by giving written notice to the Manager of Materials at any time prior to the Submission Deadline.

B23.1.1 Notwithstanding C22.5, the time and date of receipt of any notice withdrawing a Proposal shall be the time and date of receipt as determined by the Manager of Materials.

B23.1.2 The City will assume that any one of the contact persons named in Paragraph 3 of Form A: Proposal or the Bidder's authorized representatives named in Paragraph 11 of Form A: Proposal, and only such person, has authority to give notice of withdrawal.

B23.1.3 If a Bidder gives notice of withdrawal prior to the Submission Deadline, the Manager of Materials will:

- (a) retain the Proposal until after the Submission Deadline has elapsed;
- (b) open the Proposal to identify the contact person named in Paragraph 3 of Form A: Proposal and the Bidder's authorized representatives named in Paragraph 11 of Form A: Proposal; and
- (c) if the notice has been given by any one of the persons specified in B23.1.3(b), declare the Proposal withdrawn.

B23.2 A Bidder who withdraws his Proposal after the Submission Deadline but before his offer has been released or has lapsed as provided for in B22.2 shall be liable for such damages as are imposed upon the Bidder by law and subject to such sanctions as the Chief Administrative Officer considers appropriate in the circumstances. The City, in such event, shall be entitled to all rights and remedies available to it at law, including the right to retain the Bidder's bid security.

B24. INTERVIEWS

B24.1 The Contract Administrator may, in his sole discretion, interview Bidders during the evaluation process.

B25. NEGOTIATIONS

B25.1 The City reserves the right to negotiate details of the Contract with any Bidders. Bidders are advised to present their best offer, not a starting point for negotiations in their Proposal Submission.

B25.2 The City may negotiate with the Bidders submitting, in the City's opinion, the most advantageous Proposals. The City may enter into negotiations with one or more Bidders without being obligated to offer the same opportunity to any other Bidders. Negotiations may be concurrent and will involve each Bidder individually. The City shall incur no liability to any Bidder as a result of such negotiations.

B25.3 If, in the course of negotiations, the Bidder amends or modifies a Proposal after the Submission Deadline, the City may consider the amended Proposal as an alternative to the Proposal already submitted without releasing the Bidder for the Proposal as originally submitted.

B26. EVALUATION OF PROPOSALS

B26.1 The RFP evaluation process will involve a two (2) stage approach.

B26.1.1 Stage 1 will be the evaluation of the written Proposal Submissions.

B26.1.2 Stage 2 may include any, or all, of the requirements outlined in B

B26.2 Award of Contract shall be based on the following evaluation criteria:

- (a) compliance by the Bidder with the requirements of the Request for Proposal or acceptable deviation therefrom: (pass/fail);

Note: any statement containing the term "must" or "shall" may be considered a mandatory requirement. Any clearly stated exception to a mandatory requirement may result in a failure or non-responsive bid.

- (b) qualifications of the Bidder and the Subcontractors, if any, pursuant to B20: (pass/fail)
- (c) technology and tools 20%
- (d) overall implementation plan 20%
- (e) training plan 10%
- (f) experience and references 25%
- (g) financial stability 5%
- (h) pricing 20%

B26.3 Further to B26.2(a), the Award Authority may reject a Proposal as being non-responsive if the Proposal Submission is incomplete, obscure or conditional, or contains additions, deletions, alterations or other irregularities. The Award Authority may reject all or any part of any Proposal, or waive technical requirements if the interests of the City so require.

- B26.4 Further to B26.2(b), the Award Authority shall reject any Proposal submitted by a Bidder who does not demonstrate, in his Proposal Submission or in other information required to be submitted, that he is responsible and qualified.
- B26.5 Further to B26.2(c), the evaluation will be based primarily on:
- (a) capability of technology;
 - (b) flexibility;
 - (c) forward-looking; and
 - (d) disaster recovery.
- B26.6 Further to B26.2(d), the evaluation will be based primarily on:
- (a) relevant experience;
 - (b) plan and roadmap;
 - (c) timelines; and
 - (d) team
- B26.7 Further to B26.2(e), the evaluation will be based primarily on:
- (a) relevant experience;
 - (b) plan;
 - (c) timelines; and
 - (d) team
- B26.8 Further to B26.2(f), the evaluation will be based primarily on:
- (a) 311 experience;
 - (b) public sector; and,
 - (c) customer references.
- B26.9 Further to B26.2(g), the evaluation will be based primarily on:
- (a) growth;
 - (b) concentration of customers; and
 - (c) financial ratios
- B26.10 Further to B26.2(h), the evaluation will be based primarily on competitiveness of pricing.
- B26.11 Further to B26.2 the evaluation committee may, in addition to the evaluation criteria described above, apply other evaluation criteria which the evaluation committee determines are relevant during the evaluation process. The evaluation committee will apply the same criteria to the evaluation of all RFP Submissions.
- B26.12 If, in the sole opinion of the City, a Proposal does not achieve a pass rating for B26.2(a) and B26.2(b), the Proposal may be determined to be non-responsive and not be further evaluated.

B27. DEMONSTRATIONS AND PRESENTATIONS

- B27.1 The City may require the Bidders to provide a demonstration and oral presentation of their solution based on functional and architectural requirements as set out in this RFP.
- B27.1.1 The City, at its sole discretion, may have confidential discussions / interviews / presentations with any Bidder, and ask them to make short formal presentations (presenters will be required to supply their own demonstration equipment and material);

B27.1.2 Bidders must be prepared to answer questions on their Proposal and shall cooperate with the City in respect to scheduling demonstrations and any other requirements imposed by the City.

B27.2 A demonstration, on-site or by way of a visit to an existing site, may be required and may include the following:

- (a) demonstration of software functionality;
- (b) demonstration of ease of use;
- (c) "hands-on" product use sessions; and,
- (d) reporting functionality.

B28. AWARD OF CONTRACT

B28.1 The City will give notice of the award of the Contract, or will give notice that no award will be made.

B28.2 The City will have no obligation to award a Contract to a Bidder, even though one or all of the Bidders are determined to be responsible and qualified, and the Proposals are determined to be responsive.

B28.2.1 Without limiting the generality of B28.2, the City will have no obligation to award a Contract where:

- (a) the prices exceed the available City funds for the Work;
- (b) the prices are materially in excess of the prices received for similar work in the past;
- (c) the prices are materially in excess of the City's cost to perform the Work, or a significant portion thereof, with its own forces;
- (d) only one Proposal is received; or
- (e) in the judgment of the Award Authority, the interests of the City would best be served by not awarding a Contract.

B28.3 Where an award of Contract is made by the City, the award shall be made to the responsible and qualified Bidder submitting the most advantageous offer.

B28.3.1 Following the award of contract, a Bidder will be provided with information related to the evaluation of his Proposal upon written request to the Contract Administrator.

PART C - GENERAL CONDITIONS

C0. GENERAL CONDITIONS

- C0.1 The *General Conditions for Supply of Services* (Revision 2007 04 12) are applicable to the Work of the Contract.
- C0.1.1 The *General Conditions for Supply of Services* are available on the Information Connection page at The City of Winnipeg, Corporate Finance, Materials Management Branch internet site at <http://www.winnipeg.ca/matmgt>.
- C0.2 A reference in the Request for Proposal to a section, clause or subclause with the prefix “**C**” designates a section, clause or subclause in the *General Conditions for Supply of Services*.

PART D - SUPPLEMENTAL CONDITIONS

GENERAL

D1. GENERAL CONDITIONS

- D1.1 In addition to the *General Conditions for Supply of Services*, these Supplemental Conditions are applicable to the Work of the Contract.
- D1.1 In addition to the *General Conditions*, these Supplemental Conditions are applicable to the Work of the Contract.

D2. SCOPE OF WORK

- D2.1 The Work to be done under the Contract shall consist of Provision of a Consolidated 311 Service.
- D2.2 The major components of the Work are detailed in E6.9:

D3. DEFINITIONS

- D3.1 When used in this Request for Proposal:
- (a) "**ACD**" means Automatic Call Distributor;
 - (b) "**311 Contact Centre**" means the entire operation providing the consolidate 311 contact centre service to the City of Winnipeg;
 - (c) "**Appendix**" means supplementary material provided with the Request for Proposal that contain additional important information;
 - (d) "**Attachment**" means an associated document to be returned with the appropriate Requirements/Questionnaire to form a part of the Proposal Submission;
 - (e) "**CRM**" means Customer Relationship Management software;
 - (f) "**CTI**" means Computer Telephone Interface;
 - (g) "**Full Call**" means a call that can be handled completely from arrival in the queue to resolution;
 - (h) "**IR Map**" means Information Request map which outlines a request for public information where no action on behalf of the City is required;
 - (i) "**IVR**" means Integrated Voice Response;
 - (j) "**may**" means indicates an allowable action or feature which will not be evaluated on a pass/fail basis;
 - (k) "**must**" or "**shall**" means indicates a mandatory requirement which will be evaluated;
 - (l) "**Partial**" means calls that should be considered take and transfer;
 - (m) "**Proposal**" means the offer contained in the Proposal Submission;
 - (n) "**Proposal Submission**" means the portion of the Request for Proposal which must be completed or provided and submitted by the Submission Deadline in order to constitute a responsive Proposal;
 - (o) "**QA**" means Quality Assurance
 - (p) "**Request for Proposal**" or "**RFP**" means Request for Proposal 192-2008 issued by the City, including all attachments, appendices, addenda and amendments of any kind;
 - (q) "**should**" indicates a desirable action or feature which will be evaluated on a relative scale;
 - (r) "**SME**" means Subject Matter Expert;

- (s) “**soft launch**” means operation of the 311 Contact Centre by routing some or all of the calls from the existing call centres, before the formal publicized 311 Contact Centre launch;
- (t) “**SR Map**” means Service Request Map which outlines the business processes including various decision points and data required to initiate an action on the City’s behalf;
- (u) “**Take and Transfer Call**” means a call that once identified are transferred out to a subject matter expert or specialist to be handled completely;
- (v) “**Telephony Solution**” means all telephony related hardware and software, including IVR, Switch/ACD, WA, CTI, WFM, Digital Recording, phones, voice and data;
- (w) “**WFM**” means Work Force Management.

D4. CONTRACT ADMINISTRATOR

D4.1 The Contract Administrator is:

Stewart Bidinosti
311 Project Manager
4th Floor, 510 Main Street
Winnipeg, MB R3B 1B9

Telephone No. (204) 986-3111
Facsimile No. (204) 896-8950
Email: sbidinosti@winnipeg.ca

D4.2 At the pre-commencement meeting, the Contract Administrator will identify additional personnel representing the Contract Administrator and their respective roles and responsibilities for the Work.

D5. CONTRACTOR'S REPRESENTATIVE

D5.1 Further to C6.19, the Contractor shall employ and keep on the Work, at all times during the performance of the Work, a competent supervisor and assistants, if necessary, acceptable to the Contract Administrator. The supervisor shall represent the Contractor on the Site. The supervisor shall not be replaced without the prior consent of the Contract Administrator unless the supervisor proves to be unsatisfactory to the Contractor and ceases to be in his employ.

D5.2 Before commencement of Work, the Contractor shall identify his designated supervisor and any additional personnel representing the Contractor and their respective roles and responsibilities for the Work.

D5.2.1 Further to C5.5 Contract Administrator may give instructions or orders to the Contractor’s supervisor and such instructions or orders shall be deemed to have been given to the Contractor.

D6. CONFIDENTIALITY AND OWNERSHIP OF INFORMATION

D6.1 Information provided to the Contractor by the City or acquired by the Contractor during the course of the Work is confidential. Such information shall not be used or disclosed in any way without the prior written authorization of the Contract Administrator.

D6.2 The Contract, all deliverables produced or developed, and information provided to or acquired by the Contractor are the property of the City. The Contractor shall not disclose or appropriate to its own use, or to the use of any third party, all or any part thereof without the prior written consent of the Contract Administrator.

D6.3 The Contractor shall not make any statement of fact or opinion regarding any aspect of the Contract to the media or any member of the public without the prior written authorization of the Contract Administrator.

SUBMISSIONS

D7. AUTHORITY TO CARRY ON BUSINESS

D7.1 The Contractor shall be in good standing under The Corporations Act (Manitoba), or properly registered under The Business Names Registration Act (Manitoba), or otherwise properly registered, licensed or permitted by law to carry on business in Manitoba, or if the Contractor does not carry on business in Manitoba, in the jurisdiction where the Contractor does carry on business, throughout the term of the Contract, and shall provide the Contract Administrator with evidence thereof upon request.

D8. INSURANCE

D8.1 The Contractor shall provide and maintain the following insurance coverage:

- (a) Commercial general liability insurance, in the amount of at least two million dollars (\$2,000,000.00) inclusive, with The City of Winnipeg added as an additional insured; said commercial general liability insurance to include a cross-liability clause (otherwise known as Severability of Interest), contractual liability and products and completed operations cover, to remain in place at all times during the performance of the Work and throughout the warranty period;
- (b) If required, automobile liability insurance for owned and non-owned automobiles used for or in connection with the Work in the amount of at least two million dollars (\$2,000,000.00), to remain in place at all times during the performance of the Work and until the date of Total Performance;
- (c) Professional liability or Errors and Omissions liability insurance in the amount of at least one million dollars (\$1,000,000.00) per claim and two million dollars (\$2,000,000.00) aggregate to remain in place at all times during the performance of the Work and throughout the warranty period.

D8.2 Deductibles shall be borne by the Contractor.

D8.3 The Contractor shall provide the Contract Administrator with a certificate or certificates of insurance at least two (2) Business Days prior to the commencement of any Work on the Site but in no event later than seven (7) Calendar Days from notification of the award of Contract.

D8.4 The Contractor shall not cancel, or cause any such policy or policies to lapse without a minimum thirty (30) days prior written notice to the City.

D8.5 The Contractor shall provide written notice to the City of any material changes to their policies within thirty (30) days of the change taking effect.

D8.6 The City shall have the right to alter the limits and/or coverages as reasonably required from time to time during the continuance of this agreement.

D9. PERFORMANCE SECURITY

D9.1 The Contractor shall provide and maintain performance security until the expiration of the warranty period in the form of:

- (a) a performance bond of a company registered to conduct the business of a surety in Manitoba, in the form attached to these Supplemental Conditions (Form H1: Performance Bond), in the amount of fifty percent (50%) of the Contract Price; or
- (b) an irrevocable standby letter of credit issued by a bank or other financial institution registered to conduct business in Manitoba and drawn on a branch located in Winnipeg, in the form attached to these Supplemental Conditions (Form H2: Irrevocable Standby Letter of Credit), in the amount of fifty percent (50%) of the Contract Price; or

- (c) a certified cheque or draft payable to "The City of Winnipeg", drawn on a bank or other financial institution registered to conduct business in Manitoba, in the amount of fifty percent (50%) of the Contract Price.

D9.1.1 Where the performance security is in the form of a certified cheque or draft, it will be deposited by the City. The City will not pay any interest on certified cheques or drafts furnished as performance security.

SCHEDULE OF WORK

D10. COMMENCEMENT

D10.1 The Contractor shall not commence any Work until he is in receipt of a notice of award from the City authorizing the commencement of the Work.

D10.2 The Contractor shall not commence any Work on the Site until:

- (a) the Contract Administrator has confirmed receipt and approval of:
 - (i) evidence of authority to carry on business specified in D7;
 - (ii) evidence of the workers compensation coverage specified in C6.14;
 - (iii) evidence of the insurance specified in D8;
 - (iv) the performance security specified in D9.
- (b) the Contractor has attended a meeting with the Contract Administrator, or the Contract Administrator has waived the requirement for a meeting.

D11. CRITICAL STAGES

D11.1 The Contractor shall achieve critical stages of the Work in accordance with the following requirements:

- (a) Validation of all SR and IR maps, readiness for configuration August 8, 2008
- (b) Training effort complete November 30, 2008

D12. TOTAL PERFORMANCE

D12.1 The Contractor shall achieve Total Performance by January 1, 2009.

D12.2 When the Contractor or the Contract Administrator considers the Work to be totally performed, the Contractor shall arrange, attend and assist in the inspection of the Work with the Contract Administrator for purposes of verifying Total Performance. Any defects or deficiencies in the Work noted during that inspection shall be remedied by the Contractor at the earliest possible instance and the Contract Administrator notified so that the Work can be reinspected.

D12.3 The date on which the Work has been certified by the Contract Administrator as being totally performed to the requirements of the Contract through the issue of a certificate of Total Performance is the date on which Total Performance has been achieved.

D13. LIQUIDATED DAMAGES

D13.1 If the Contractor fails to achieve Total Performance in accordance with the Contract by the days fixed herein for same, the Contractor shall pay the City twenty thousand dollars (\$20,000) per Calendar Day for each and every Calendar Day following the days fixed herein for same during which such failure continues:

D13.2 The amounts specified for liquidated damages in D13.1 are based on a genuine pre-estimate of the City's losses in the event that the Contractor does not achieve critical stages or Total Performance by the days fixed herein for same.

D13.3 The City may reduce any payment to the Contractor by the amount of any liquidated damages assessed.

CONTROL OF WORK

D14. JOB MEETINGS

D14.1 Regular weekly job meetings will be held at the Site. These meetings shall be attended by a minimum of one representative of the Contract Administrator, one representative of the City and one representative of the Contractor. Each representative shall be a responsible person capable of expressing the position of the Contract Administrator, the City and the Contractor respectively on any matter discussed at the meeting including the Work schedule and the need to make any revisions to the Work schedule. The progress of the Work will be reviewed at each of these meetings.

D14.2 The Contract Administrator reserves the right to cancel any job meeting or call additional job meetings whenever he deems it necessary.

D15. PRIME CONTRACTOR – THE WORKPLACE SAFETY AND HEALTH ACT (MANITOBA)

D15.1 Further to C6.23, the Contractor shall be the Prime Contractor and shall serve as, and have the duties of the Prime Contractor in accordance with The Workplace Safety and Health Act (Manitoba).

D16. SAFETY

D16.1 The Contractor shall be solely responsible for safety at the Site and for compliance with all laws, rules, regulations and practices required by the applicable safety legislation.

D16.2 The Contractor shall be solely responsible for securing the Site, and any existing facility thereon, and for the proper care and protection of the Work already performed.

D16.3 The Contractor shall do whatever is necessary to ensure that:

- (a) no person, property, right, easement or privilege is injured, damaged or infringed by reason of the Contractor's activities in performing the Work;
- (b) the health and safety of all persons employed in the performance of the Work or otherwise is not endangered by the method or means of its performance.

D17. DEFICIENCIES

D17.1 Further to C10.5, the Contract Administrator may order the Contractor to alter or improve his methods, to furnish additional or more suitable Material, or to employ additional or more qualified labour if, at any time, the Contract Administrator determines that:

- (a) the Work is not being, or will likely not be, performed satisfactorily; or
- (b) progress is not being, or will likely not be, maintained in accordance with the work schedule.

D17.2 If the Work or any part thereof is taken out of the Contractor's control pursuant to C18.7, all Material, and the interest of the Contractor in all licences, powers and privileges acquired, used or provided by the Contractor under the Contract shall be assigned by the Contractor to the City without compensation to the Contractor.

D17.3 The City shall have the right to take possession of and use any of the Contractor's material and property of every kind provided by the Contractor for the purpose of the Work, and to procure other Material or Services for the completion thereof.

- D17.4 When the Contract Administrator certifies that any Material or any interest of the Contractor referred to in D17.2, is no longer required for the purposes of the Work, or that it is not in the best interest of the City to retain that Material or interest, it shall revert to the Contractor.

MEASUREMENT AND PAYMENT

D18. PAYMENT

- D18.1 Further to C11, effective January 1, 2007 the City may at its option pay the Contractor by direct deposit to the Contractor's banking institution.

D19. PAYMENT SCHEDULE

- D19.1 Further to C11, payment shall be in accordance with the following payment schedule:
- (a) 10% at Commencement;
 - (b) 10% June 1, 2008
 - (c) 10% July 1, 2008
 - (d) 20% August 8, 2008
 - (e) 10% September 1, 2008
 - (f) 10% October 1, 2008
 - (g) 10% November 30, 2008
 - (h) 10% Total Performance (January 1, 2009)

WARRANTY

D20. WARRANTY

- D20.1 Warranty is as stated in C12.

FORM H1: PERFORMANCE BOND
(See D9)

KNOW ALL MEN BY THESE PRESENTS THAT

_____ ,
(hereinafter called the "Principal"), and

_____ ,
(hereinafter called the "Surety"), are held and firmly bound unto **THE CITY OF WINNIPEG** (hereinafter called the "Obligee"), in the sum of

_____ dollars (\$_____)

of lawful money of Canada to be paid to the Obligee, or its successors or assigns, for the payment of which sum the Principal and the Surety bind themselves, their heirs, executors, administrators, successors and assigns, jointly and severally, firmly by these presents.

WHEREAS the Principal has entered into a written contract with the Obligee dated the

_____ day of _____, 20____, for:

RFP NO. 192-2008

PROVISION OF A CONSOLIDATED 311 SERVICE

which is by reference made part hereof and is hereinafter referred to as the "Contract".

NOW THEREFORE the condition of the above obligation is such that if the Principal shall:

- (a) carry out and perform the Contract and every part thereof in the manner and within the times set forth in the Contract and in accordance with the terms and conditions specified in the Contract;
- (b) perform the Work in a good, proper, workmanlike manner;
- (c) make all the payments whether to the Obligee or to others as therein provided;
- (d) in every other respect comply with the conditions and perform the covenants contained in the Contract; and
- (e) indemnify and save harmless the Obligee against and from all loss, costs, damages, claims, and demands of every description as set forth in the Contract, and from all penalties, assessments, claims, actions for loss, damages or compensation whether arising under "The Workers Compensation Act", or any other Act or otherwise arising out of or in any way connected with the performance or non-performance of the Contract or any part thereof during the term of the Contract and the warranty period provided for therein;

THEN THIS OBLIGATION SHALL BE VOID, but otherwise shall remain in full force and effect. The Surety shall not, however, be liable for a greater sum than the sum specified above.

AND IT IS HEREBY DECLARED AND AGREED that the Surety shall be liable as Principal, and that nothing of any kind or matter whatsoever that will not discharge the Principal shall operate as a discharge or release of liability of the Surety, any law or usage relating to the liability of Sureties to the contrary notwithstanding.

IN WITNESS WHEREOF the Principal and Surety have signed and sealed this bond the

_____ day of _____, 20____.

SIGNED AND SEALED
in the presence of:

(Witness)

(Name of Principal)

Per: _____ (Seal)

Per: _____

(Name of Surety)

By: _____ (Seal)
(Attorney-in-Fact)

**FORM H2: IRREVOCABLE STANDBY LETTER OF CREDIT
(PERFORMANCE SECURITY)
(See D9)**

(Date)

The City of Winnipeg
Corporate Services Department
Legal Services Division
185 King Street, 3rd Floor
Winnipeg MB R3B 1J1

RE: PERFORMANCE SECURITY – RFP NO. 192-2008
PROVISION OF A CONSOLIDATED 311 SERVICE

Pursuant to the request of and for the account of our customer,

(Name of Contractor)

(Address of Contractor)

WE HEREBY ESTABLISH in your favour our irrevocable Standby Letter of Credit for a sum not exceeding in the aggregate

_____ Canadian dollars.

This Standby Letter of Credit may be drawn on by you at any time and from time to time upon written demand for payment made upon us by you. It is understood that we are obligated under this Standby Letter of Credit for the payment of monies only and we hereby agree that we shall honour your demand for payment without inquiring whether you have a right as between yourself and our customer to make such demand and without recognizing any claim of our customer or objection by the customer to payment by us.

The amount of this Standby Letter of Credit may be reduced from time to time only by amounts drawn upon it by you or by formal notice in writing given to us by you if you desire such reduction or are willing that it be made.

Partial drawings are permitted.

We engage with you that all demands for payment made within the terms and currency of this Standby Letter of Credit will be duly honoured if presented to us at:

(Address)

and we confirm and hereby undertake to ensure that all demands for payment will be duly honoured by us.

All demands for payment shall specifically state that they are drawn under this Standby Letter of Credit.

Subject to the condition hereinafter set forth, this Standby Letter of Credit will expire on

(Date)

It is a condition of this Standby Letter of Credit that it shall be deemed to be automatically extended from year to year without amendment from the present or any future expiry date, unless at least 30 days prior to the present or any future expiry date, we notify you in writing that we elect not to consider this Standby Letter of Credit to be renewable for any additional period.

This Standby Letter of Credit may not be revoked or amended without your prior written approval.

This credit is subject to the Uniform Customs and Practice for Documentary Credit (1993 Revision), International Chamber of Commerce Publication Number 500.

(Name of bank or financial institution)

Per: _____
(Authorized Signing Officer)

Per: _____
(Authorized Signing Officer)

PART E - SPECIFICATIONS

GENERAL

E1. OVERVIEW OF EXISTING CALL CENTRE OPERATIONS AND ENVIRONMENT

E1.1 The consulting firm AtFocus was retained by the City to provide a business plan to address the implementation of the 311 model of customer service with options regarding the scope of the initiative and associated costs and benefits. The consultant analyzed the state of the City's existing customer contact point environment and the AtFocus Report details the current call taking environment at the City of Winnipeg. Bidders should refer to the section of the AtFocus Report entitled "City of Winnipeg Current State" pages 13 to 27. The report can be found at http://www.winnipeg.ca/finance/findata/matmgt/documents/2007/101-2007/101-2007_AtFocus_Report.pdf .

E1.2 The AtFocus Report may be used only for the purpose of preparing an RFP Submission. The City makes no representations or warranties as to the accuracy or sufficiency of the AtFocus Report.

E2. SCOPE OF 311 CALL CENTRE SERVICE AND OPERATIONS

Call Volume

E2.1 The 311 Contact Centre will operate 24 hrs/day, 7 days/week and will have the capability of handling 2.4 million contacts per annum, by phone, fax, mail, and web communications. Historically, the current centres handle in excess of 300 different types of calls and the City has developed SR and IR Maps for each type of call with the nature and flow of the call. Based on 2006 call centre volumes and activities across the existing contact centres, the 311 Contact Centre can expect the following call distribution:

(a) 74% - Full calls

These calls are handled, by a 311 agent, completely from arrival in the queue to resolution. It is estimated that 1.4 millions calls are Winnipeg Transit related, each requiring seventy (70) seconds to complete.

(b) 26% - Take and Transfer calls

These calls once identified are transferred out to a subject matter expert to be handled completely. The calls may be transferred to multiple contacts within various departments at the City of Winnipeg, including calls that must be directed to the Police Emergency Call Centre (911) immediately.

E2.1.1 Included as Appendix C is a listing of some examples of Full Calls and Take and Transfer Calls. For the information of the Bidder, the City has determined that any calls identified as "Partial" calls should be considered as Take and Transfer calls.

E2.2 Given that the City is currently providing service through 22 disparate centres, actual consolidated calling data summarizing call volume by time of day, day of week etc. is not available. It is anticipated that the City would follow the general call volume pattern experienced by most other 311 centres. Therefore, included in Appendix A is actual 311 call centre data obtained from another Canadian city, which the City of Winnipeg believes is representative of the call patterns expected for the 311 Contact Centre for Winnipeg. Call data and graphs charting time of day and day of week calling patterns in Appendix A and include the following:

(a) Call patterns for four days in May 2007 – Monday (heaviest call volume), Wednesday (represents the average week day), and Saturday & Sunday (showing call patterns on the weekend);

(b) Call offerings in fifteen (15) minute intervals.

E2.3 Bidders should not consider the number of calls contained in this information as reflective of the call volumes for Winnipeg. Rather, this information is been presented as a reflection of the call

patterns (time of day and day of week). The annual call volume for the Winnipeg 311 Contact Centre is estimated at 2.4 million calls annually.

Human Resource Planning

- E2.4 The City recognized early the significance of the change that the 311 Contact Centre would bring to the City's employees. Since November 2007, as part of the City's pre-implementation effort the City has deployed dedicated resources to develop a redeployment strategy to ensure our current employees in the existing 22 locations are provided with the best possible information as they consider their future employment options.
- E2.5 As the City moves to a consolidated model, our redeployment strategy and ensuing recruitment strategy will ensure that City employees currently employed in the existing 22 locations have the opportunity to be part of the consolidated Contact Centre. The City will take full responsibility for both the redeployment and recruitment effort and ensure that Contact Centre employees are recruited and available when the testing and training phases of the implementation effort begin.

Facilities Development

- E2.6 The City has undertaken a significant planning and development effort to ensure that a fully operational Contact Centre is available for occupation in early July, 2008. All aspects of floor plan design, LAN and telephone infrastructure cabling, furnishings and related facilities equipment are currently being considered. The site has been selected and design work is ongoing.
- E2.7 The facility will offer over 10,000 square feet of space with 60 workstations dedicated to CSR use and a dedicated on site training facility able to accommodate 12 staff.
- E2.8 The City will remain responsible for delivering this facility. The City plans to make this facility available for use as the implementation effort moves through the testing and training phases.

Knowledge Development and Management

- E2.9 The City acknowledges that the building of the knowledge base required is the City's responsibility. The City also acknowledges that the 300 maps (SR and IR) were completed during 2006 and changes may have occurred since that time. It is anticipated that approximately 90% remain valid and capture 95% of the work actually completed. Additional services developed, since that time, are considered minimal. The maps provide an outline of the business process in its current state, and in some cases the proposed state, once the transfer to 311 is complete.
- E2.10 The City has taken the initiative to begin building the required data base prior to the CRM procurement process. The methodology and template used to begin developing the required information shall not interfere nor bias the selection process of the CRM. The intent is to have the business processes, and data required approved and ready to configure into the CRM at the earliest possible date.
- E2.11 To achieve this goal, the established roles and responsibilities of the various 311 stakeholders and departmental stakeholders as follows:
- (a) **Department Sponsors:** Each City department has assigned a senior manager to coordinate all 311 matters within the Department. The sponsors act as an advocate and single point of contact for the 311 project team and consultant. Identification and coordination of the Department Subject Matter Experts and reviewing/approving any reengineering initiatives will be a significant role.
 - (b) **Knowledge Management Coordinator:** The City shall provide a full time Coordinator to assist with the planning, and organizing of the knowledge base. This position shall also provide assistance in dealing with matters requiring escalation to Department Sponsors as well as facilitate any reengineering approvals.

- (c) **Knowledge Management and Department Liaison:** Three full time City staff will be part of the project team to assist in the knowledge base development. These positions shall be responsible for future development and maintenance on a go forward and long terms basis. The City Departments will be divided equitably between the three Knowledge Management and Department Liaison members.
- (d) **Subject Matter Experts (SMEs):** Each Department will have one or several SMEs who are responsible for providing the content expertise for the SR maps. In addition, SMEs are responsible for providing business expertise to the 311 team, provide front line support for the Department, monitor and maintain the SR for changes and updates, and co-ordinate with other Departments where calls/processes affect more than one Department.

E2.12 The City has also retained ACS Public Sector Solutions Inc. to:

- (a) Provide consulting services regarding the overall development of the knowledge base and collaborate with the City's Knowledge Management Coordinator to resolve issues and track work progress; Provide project methodology (process articulating how to capture data) and template (in what format is the data to be captured) for the SR and IR maps;
- (b) Train and work with the Knowledge Management Coordinator and 3 Knowledge Management and Department Liaison City employees to develop competency on the methodology, template and overall approach;
- (c) Orientate 31 department Subject Matter Experts to the methodology, template and overall approach; and
- (d) Provide two resources with expertise in creating written content for the web or enhancing current content for the Winnipeg.ca website in order to fulfill the IR map requirements while the City retains responsibility for content transfer to the Winnipeg.ca website.

E2.13 At present the 300 SR and IR maps link to 40 different legacy systems. See Appendix D for the systems and Appendix B for a sampling of the maps. It is unknown which of these systems will continue to be active going forward although several will require integration with the City's CRM application.

E3. OVERVIEW OF EXISTING TELEPHONY TECHNOLOGY

- E3.1 The City of Winnipeg is a single tier municipality that provides municipal services to the citizens of Winnipeg. Municipal services provided include police, fire, ambulance, public works, water & waste, urban planning, parks and recreation, library, and other government operations. The provision of municipal services is currently provided by twelve distinct departments and several Special Operating Agencies that are spread out over two hundred locations in the City of Winnipeg. An overview of the City of Winnipeg including departmental functions can be found in the City of Winnipeg Home Page at www.Winnipeg.ca.
- E3.2 The City currently outsources its phone service to MTS Allstream Inc. which uses a Digital Meridian Centrex 5 system (Nortel DMS100 switches) on version SM09.
- E3.3 The City's Centrex system currently has assigned to it approximately 4,200 single lines and 825 multi-lines (PSET) with 460 additional directory numbers and 100 visual appearance directory numbers attached. These lines employ the full range of standard Centrex programming features, including ring again, call transfer, call forward, call hold, call park, last number re-dial, call waiting, and call trace. Enhanced Centrex features including calling line identification and name identification are also available to the City. The City's telephone system is set up in groups by Network Class of Service (NCOS) to allow for toll denial, directory assistance blocking, paging systems, etc. There are currently 36 NCOS groups assigned to the City.
- E3.4 The City of Winnipeg employs two types of queuing systems to assist in customer service call centre applications; 26 Uniform Call Distribution (UCD) queues, and 23 Automatic Call Distribution (ACD) queues. The ACD queues are supported by a Perimeter Technologies reporting system which provided dynamic information on all aspects of the queues and also allows for customer modification of queue structures. Call centre features supported in ACD queues include agent status, call park, call transfer, conference three-way, display call,

emergency, incalls, intelligent call management, login/logout, MBS, MIS, music, night service, not ready, observe, overflow, recorded announcement, etc.

- E3.5 The City currently uses the Message Manager voice messaging service (Octel version VIS 3.1) from MTS Allstream Inc. The City leases approximately 2,500 voice mail boxes, 50 transfer mail boxes, 70 Enhanced Call Processing Auto Attendant mail boxes and information only mail boxes as a part of the Message Manager service.
- E3.6 The City has an E911 Call Centre run on a CML Technologies Inc. Emergency Communications System ECS1000 voice and data switching system version 5.0.
- E3.7 The Contact Centre facility will be supplied with a 100 Mb/s network bandwidth to the City's backbone infrastructure.
- E3.8 The City of Winnipeg has an extensive fibre optic network connecting various facilities. The City utilizes category 6 cabling in most of its buildings and the Contact Centre is being outfitted with 3 category 6 cables to each workstation. The City's backbone network uses Cisco routers for communications over its fibre optic and wide area networks. Extensive security is in place. Most of the local area networks are switched Ethernet using Cisco Catalyst switches to connect approximately 5,000 PCs to the City's backbone network.

E4. OVERVIEW OF EXISTING TECHNICAL INFRASTRUCTURE ENVIRONMENT

Servers (Production, Test, Development, Others)

- E4.1 The City uses HP/Intel Windows 2003 Server platforms.
- E4.2 The City uses Microsoft Systems Center Operations Manager to monitor and manage the server environment.

Storage

- E4.3 The City has a SAN environment consisting of HDS Storage Subsystems (NSC55, AMS1000) and Brocade switches to support data storage requirements for the production and development database tiers.
- E4.4 The City uses IBM's TSM Backup/Archive and Microsoft DPM products for backup and recovery services.

Database

- E4.5 The City uses Oracle 10g Standard Edition and Microsoft SQL Server 2005 Standard Edition. For larger scale applications Oracle is the preferred platform.
- E4.6 The City has implemented a functional database environment that fulfills all application system functional requirements, provides full online back-up, recovery and reorganization facilities including database transaction logging and up-to-the-minute forward recovery, plus timely automated reporting of actual or potential errors or problems.
- E4.7 The City conducts database performance measurement and tuning as necessary.

Network

- E4.8 The City of Winnipeg Backbone Network Infrastructure allows TCP/IP data communications between all City departments. This allows about 5,000 devices connected through the Backbone Network to be able to communicate with each other, the Internet and with central servers at two corporate data centres. Over 150 remote sites are connected to the City's Backbone Network at speeds ranging from 100/1000BaseT fibre optic connectivity for large LANs, 10 Mbps for medium sized LANs and 2 Mbps connections for small LANs. Cisco routers and switches are used in the WAN and LAN as well as for VPN remote access. Checkpoint Nokia firewall products provide network security.

Client Platform

- E4.9 The City has in excess of five thousand (5,000) Personal Computer client workstations deployed throughout its entire organization. The vast majority of our PC's use current versions of Microsoft XP Pro or Windows 2000, with a limited use of Vista. Our current Office suite includes Microsoft Office 2000, 2002, 2003 and 2007. Our servers are mostly Windows 2000 and 2003. The City currently uses Exchange version 2003 and will migrate to Exchange 2007 within the next 12-18 months.

Data Warehouse

- E4.10 The City utilizes Oracle's Enterprise Performance Management (Version 8.9) data warehouse and Cognos (Version 7.3) to provide in-depth analytical reporting. Extract, Transfer and Load (ETL) functionality is provided by Ascential (Version 7.5).
- E4.11 Any CRM application proposed must provide integration points and/or documentation to facilitate the integration of customer and call data into the warehouse.
- E4.12 The City intends to provide all technical infrastructure and related infrastructure implementation skills necessary to facilitate the implementation of the CRM and related telephony equipment. The City will work with the Contractor to ensure the infrastructure associated with the CRM and related telephony equipment is adequately sized and architected to achieve the performance and reliability standards the City requires for the 311 Contact Centre.

E5. OVERVIEW OF EXISTING REPORTING ENVIRONMENT

- E5.1 City staff have visited all civic departments and politicians in February 2008 to review the reporting systems used for the information and services they provide to the citizens of Winnipeg. During this process, we received input from the various stakeholders for the CRM reporting requirements which are reflected in Attachment B.
- E5.2 The City maintains a centralized report development and change program for reporting. End use requirements are determined by Administrators that manage the querying environment from both a performance and usage perspective as well as from a security perspective.
- E5.3 The subscription and report distribution infrastructure allows users to request reports to be run, provides the means for routing results to the appropriate people, and provides a web-based infrastructure to manage and view reports.
- E5.4 The City has an Enterprise Warehouse which is a Central data repository for all transactional data from numerous operational systems. It holds aggregated and historical data, and is optimized to handle large data volumes, numbers of users and query response times for reporting and analysis. With the use of additional components, data can be enriched to provide high management with the performance view of their business.
- E5.5 The City utilizes Perimeter Technology (version 38 and 40.0.2) for the ACD Management System in its major customer service call centres. From this system, data is collected and stored for report generation including call volume, abandoned calls, average speed of answer of answer, average conversation length, etc.
- E5.6 The City currently utilizes Synergen in its major customer service call centres to process Service Requests. The system manages the work flow to different areas and records the actions and specific time/statuses for work events so that the work effort can be measured and evaluated. In one department, Synergen has been interfaced with People Soft whereby assets, resources, and costs are recorded and tabulated so that the entire work process and costs can be analyzed.

E6. IT SOLUTION

- E6.1 The Contractor is responsible for providing and supporting all technology components and requirements for the 311 Contact Centre, including but not limited to:

- (a) Switch / ACD
- (b) Computer Telephony Integration (CTI)
- (c) IVR
- (d) Digital Recording
- (e) Quality Assurance software
- (f) Work Force Management software
- (g) 311 Customer Relationship Management application
- (h) Telephony infrastructure (voice & data)

- E6.1.1 With respect to the telephony related requirements noted above the City is open to solutions that utilize either Centrex or IP based functionality.
- E6.2 The Contractor shall provide a fully automated CRM system. The City has detailed a set of requirements to suit a robust and proven CRM system within the 311 environment.
- E6.3 In addition to providing this system, the Contractor shall integrate its IT solution with other systems which are currently in place, in the City, where data exchange is either necessary or beneficial.
- E6.4 As a result of a City - wide review of existing applications that are either involved with IR or SR related information and workflow we can present the following information:

Application's need for interface with the CRM application within 311	Application name	Vendor or In-house developed (See requirement 41 in Attachment B for vendor info.)
Interface required although status updates for SR not required	<ul style="list-style-type: none"> • Intergraph Geo Media Information System • Parking Tickets • CLASS Registration System • Animal Inventory and Control System (AICS) 	<ul style="list-style-type: none"> • Intergraph Canada • Flex T2 • The Active Network • In – house developed
Interface required with bi-directional capabilities for SR status updates	<ul style="list-style-type: none"> • Synergen • AMANDA • FIRE Inspection and Reporting System (FIRS) 	<ul style="list-style-type: none"> • Oracle/SPL • CSDC • In - house
Interface not required but intake and status of SR (if applicable) preferably within CRM	<ul style="list-style-type: none"> • Navigo • Intraview • iView 	<ul style="list-style-type: none"> • In – house • In - house • In – house

	<ul style="list-style-type: none"> • AACS • CAMA • Advisor, Map Manager, CIS • City Tax 	<ul style="list-style-type: none"> • In - house • Sigsys • In – house developed • In - house
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- E6.5 The City has determined that the need for status update capability for CSRs is driven from two primary factors. One, if the 311 Contact Centre initiated the SR, and two, if the SR requires more than 24 hours to complete then update capability is required. In the event any one of those two conditions do not exist then a bi-directional interface is not required.
- E6.6 With respect to our need of having “front ends” developed within the CRM for intake it will be necessary to scope this effort after the Contractor begins work.
- E6.7 In addition to this information the City is reviewing requirements for applications in the Cemeteries and Golf Services areas. The intent would be that during the duration of the 311 Project these applications would be developed concurrently using City resources outside of the 311 Project scope. Once complete, these applications will be evaluated as to what type of interface requirement might be necessary. Please refer to Appendix D to gain more information about in - house developed applications.
- E6.8 The Contractor shall plan, and where necessary, supply hardware, phones, software and services required to deliver a complete and integrated solution that will best meet the requirements of this RFP.
- E6.9 Specific areas of responsibility and detailed requirements are summarized below.

Scope - Implementation	
Bidder Responsibilities	City Responsibilities
<p>Knowledge Development and Management</p> <ul style="list-style-type: none"> • Load Knowledge Management information into the CRM. 	<p>Knowledge Development and Management</p> <ul style="list-style-type: none"> • Through the deliverables achieved with ACS Public Sector Solutions Inc., all matters making ready the information ready for loading into the CRM system.
<p>Training</p> <ul style="list-style-type: none"> • For CSRs, develop curriculum, develop a training schedule and deliver all training relating to telephony and hard/software applications (including CRM, QA and scheduling applications) for all 311 staff and an audience which includes other city end users of the CRM • For City technical resources, the provision of vendor supplied training to enable resources to effectively work with the Contractor in the configuration of the software and assist with interface building to existing City applications • Required to provide staffing for all technology related matters which includes training of City staff on all new hardware and software operations as well as interface building solutions presented 	<p>Training</p> <ul style="list-style-type: none"> • Develop and deliver training for City content knowledge and customer service • Schedule all members required to attend training
<p>Telephony Solution</p> <ul style="list-style-type: none"> • All matters relating to securing, installing, functionality and performance testing, of all hardware and related software • Ensuring compatibility with the City's existing non-telephony technology. 	<p>Telephony Solution</p> <ul style="list-style-type: none"> • Provide notice to Telephony Service Providers (CRTC)
<p>CRM</p> <ul style="list-style-type: none"> • All matters relating to securing, installation, leading the configuration effort, performance testing, and loading information • Provide hands on content experts to City staff to lead configuration and interfacing efforts 	<p>CRM</p> <ul style="list-style-type: none"> • Provide development staff to assist with configuration and interfacing efforts
<p>Reporting</p> <ul style="list-style-type: none"> • Make information ready to extract, transform and load (ETL) to the City's data warehouse • Lead the development and configuration of customized reports 	<p>Reporting</p> <ul style="list-style-type: none"> • Provide report development staff to assist with configuration efforts for both standard delivered reports and customized report requirements • Utilize existing capabilities of the data warehouse

Scope - Implementation	
Bidder Responsibilities	City Responsibilities
Communication <ul style="list-style-type: none"> No responsibilities 	Communication <ul style="list-style-type: none"> Provide communications staff (equivalent to one full time) for strategic communications planning and messaging for internal and external stakeholders Development of a public education campaign
Change Management <ul style="list-style-type: none"> No responsibilities 	Change Management <ul style="list-style-type: none"> All matters related to change management
Non-telephony Technology <ul style="list-style-type: none"> Advise on hardware requirements for the proposed solution. 	Non-telephony Technology <ul style="list-style-type: none"> All non-telephony related technology (E.g. network, servers, workstations) will be acquired by the City under existing agreements.

E7. TRAINING - CSR

E7.1 For the CRM navigation, telephony equipment usage, customer service and integration with legacy systems the City requires consultant support, specialized in training and coaching, to design, develop and schedule a high quality training component for use during the implementation effort and on-going operations of the 311 Contact Centre. This on-boarding training must adequately prepare Customer Service Representatives (CSRs) to handle information and service requests during "go live" by navigating and using the new CRM system, using new telephone technology, as well as navigating and using some legacy systems which are either integrated with the CRM or remain as "stand-alone" applications.

E7.1.1 The City is seeking training expertise to augment our internal resources. As part of the 311 Contact Centre implementation effort the City is providing a half - time training team lead and a full time training and coaching resource. The training and coaching resource will remain as part of the Contact Centre operations beginning in January, 2009.

E8. TRAINING – TECHNICAL IMPLEMENTATION RESOURCES

E8.1 As part of the 311 Contact Centre implementation the City will be providing a number of technical resources to assist with CRM implementation and interface building to key City legacy applications. The City's approach to new technology development is to work with and receive knowledge transfer from our implementation and vendor partners. For the 311 project we will be offering an IT Team lead, two senior developers and two intermediate level developers for programming and report development work.

E9. CHANGE MANAGEMENT

E9.1 The City will be solely responsible for change management-related resource requirements for the duration of the 311 Project. Since November of 2007 City change management resources have been active in the pre-implementation phase of the 311 Project. The City has undertaken a number of change management related activities during the pre-implementation period including recruiting a half time change management team lead (the other half - time for this resource is training), investing in a change management approach (ADKAR) and successfully mobilizing a wide breadth and depth of City stakeholders to ensure a successful 311 Contact Centre go live.

E9.2 The City will continue to:

- (a) Use a structured change management approach (ADKAR);
- (b) Assess the change and level of impact organizationally and departmentally;

- (c) Identify and further anticipate areas of resistance;
- (d) Manage resistance through clear processes of escalation;
- (e) Continue to have a strong sponsorship model with clear roles and responsibilities;
- (f) Provide change management related training and on-going resources for identified change agents;
- (g) Continue to incorporate change management with project management, communication plans and training plans; and
- (h) Continue to work collaboratively with all stakeholder groups, including critical involvement of unions.

E10. CUSTOMER SERVICE

- (a) The City will be solely responsible for customer service related training delivery and associated resources for the duration of the 311 Project. Since January of 2008, City resources have been considering the importance of customer service training for the 311 Project. The City has undertaken a number of customer service training related activities during the pre-implementation period.

E11. COMMUNICATION

- E11.1 The implementation of the 311 Contact Centre project is the largest single change initiative which has been undertaken by the organization for many years. As with any major change management activity, within a corporation of over 8000 employees, - timely, accurate and open internal communications is a critical component in the success of the project.

Portfolio Overview

- E11.2 Operation of the communications function during the length of the project will be undertaken by the equivalent of one full - time staff member. The City's communication team will be comprised of two persons with significant communication expertise. This portfolio assumes responsibility for all strategic communications planning and message development to both internal and external stakeholders. This portfolio will also manage the development and implementation of a public education campaign.

Planned Deliverables

- E11.3 During the period January 2008 – September 2008, the City's communications resources will be focused on the need to maintain a high quality, time-sensitive flow of information to all internal audiences. This goal will be accomplished through the use of a dedicated intranet site, email feedback process and cascading information meetings throughout the organization. Project communications protocols will be in place to warehouse relevant information for access during all phases.
- E11.4 External audiences will be apprised through earned media interaction at key strategic milestones through the project, as appropriate, e.g. site location, information technology awards, etc.
- E11.5 Throughout March 2008 an RFP will be developed to request market-ready recommendations on a "look and feel" for the new 311 system, including, but not limited to: creative - including graphics and slogans; video production; external media/outdoor media buys; potential web-based applications e.g. use of Quick Time. The City intends to move forward with this process during the period May, 2008 - January, 2009 after vendor selection.
- E11.6 During the January 2009 "Go-Live" live period a comprehensive public education campaign geared to migrating citizen behaviour to a "single point of access" for city services, accompanied by a public launch event at the new centre will unfold.