



December 12, 2003

To: All Proponents

Subject: Alternative Service Delivery for Workplace Support Services

It is my great pleasure, on behalf of the Ministry of Management Services and the Government of British Columbia, to issue this Joint Solution Request for Proposal. This is a vital move forward for the Ministry and its clients, and an exciting new private-sector opportunity in British Columbia.

Through this innovative Joint Solution Procurement process, we intend to select a long-term business partner to work with the Ministry to operate, maintain and enhance government's Workplace Support Services while reducing the overall cost to government.

We are committed to this process and securing a mutually beneficial outcome that will demonstrate the value of public and private sector collaboration. Thank you in advance for the time and effort you will contribute to this procurement process. Good luck to all.

Yours truly,

[Original signed by]

Sandy Santori
Minister

**Ministry of
Management Services**

Office of the Minister

Mailing Address:
Parliament Buildings

Victoria BC V8W 9E2



Ministry of Management Services

Joint Solution Procurement For the Workplace Support Services Project

JOINT SOLUTIONS REQUEST FOR PROPOSALS

Government Contact:

All enquiries related to this Joint Solution Request for Proposal, **JSRFP# SATP-042** are to be directed in writing to the person set forth below, who will respond to all enquiries as time permits. Information obtained from any other source is not official and should not be relied upon. Enquiries and any responses will be recorded and may be distributed to all Proponents at the Province's discretion.

Patrick Ngo
Manager, Commercial Services
Strategic Acquisitions and Technology Procurement Branch
Common Business Services, Solutions B.C.
e-mail: Patrick.Ngo@gems7.gov.bc.ca
Facsimile: (250) 387-1399

Delivery of Proposals:

Proposals must **not** be sent by mail, facsimile or email. Proposals and their envelopes should be clearly marked with the name and address of the Proponent, the JSRFP number, and the Project title. Ten (10) complete hard-copies and one electronic copy on CD (MS Word format) must be delivered by hand or courier, and received prior to **2:00 pm, Pacific Time on, Monday, January 26, 2004 at:**

Procurement Services
Ministry of Management Services
102 – 3350 Douglas Street
Victoria, B.C., V8Z 7X9
Attention: Patrick Ngo

Proponents Meeting

A Proponents Meeting will be held on **Friday, December 19, 2003**. Time, location, and dial-in phone access will only be announced to those submitting a Receipt Confirmation Form. Please note that this meeting is an information session to address questions regarding the alternative service delivery of Workplace Support Services. Minutes for this meeting will be taken. A copy of the recorded minutes and a list of attendees may also be posted as an addendum to this JSRFP on BC Bid. Attendance is optional.

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1 JOINT SOLUTION REQUEST FOR PROPOSAL INTRODUCTION

1.1 PURPOSE OF THE JSRFP AND JSP

The purpose of this Joint Solution Request for Proposal is to identify Proponents with the optimum combination of the capability, capacity, and commitment to be a Partner with the Province (as represented by the Ministry of Management Services) and jointly create a solution that will achieve the best business outcomes for the Project. The Project is one of the key alternative service delivery initiatives of government.

The Joint Solution Procurement process is a multi-stage procurement process comprised of two major parts. The first part is the JSRFP process, which is designed to qualify and short-list Proponents primarily on their capacity, capability and commitment to be a Partner with the Ministry in the Project. The second part of the JSP process involves three distinct phases consisting of a Joint Solution Definition Phase, a Due Diligence & Negotiation Phase and a Contract Negotiation Phase that is intended to culminate in a long-term Final Contract with the Province.

The JSRFP described in this document should result in two Preferred Proponents being identified and invited to enter into the Joint Solution Definition Phase with the Province. The Ministry and its Project team will work closely with the Preferred Proponents, through the Joint Solution Definition Phase, to determine how to best meet the objectives of the Project. The mechanism to achieve the Project objectives is expected to be innovative and to reflect a Best-in-Class Solution.

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DEFINITIONS AND ADMINISTRATIVE REQUIREMENTS

1.1.1 Definitions

Throughout this JSP, the following definitions will apply:

- a) “**3C’s**” means capacity, capability, and commitment to jointly achieve the best business outcomes for the Project, and are the key attributes that will be assessed during the JSP process;
- b) “**Asset Inventory**” means the consolidated list of Equipment, Core Software, Supported Software, Client-Line of Business Software and licenses installed and supported by the Workstation Services Branch of CITS;
- c) “**Asset Management**” means the management of Equipment, Core Software and Supported Software and licenses during their entire lifecycle including planning, acquisition, implementation, maintenance, decommissioning, de-installation and disposal, and includes deployment services relating to Client-Line of Business Software.
- d) “**Best-in-Class**” means outstanding service quality, standards or performance when compared against metrics determined by recognized industry experts for services similar to the Workplace Support Services;
- e) “**Business Alliance**” means a mutually beneficial relationship between the Ministry and the Partner;
- f) “**Client**” means the Ministries, boards, agencies, and commissions of the Province and any other entities for which the Province provides Workplace Support Services;
- g) “**Client-Line of Business Software**” means software that is or will be used by a Client to directly support its specific line of business needs, which may be commercially available or developed in custom code, and includes Corporate Software;
- h) “**Common IT Services**” or “**CITS**” means the division of Solutions BC within the Ministry as may be reconstituted, renamed or otherwise reorganized by the Ministry from time to time;
- i) “**Concept**” means the high level concept relating to the Project presented orally and in writing by a Proponent to the Province during Stage 3 of the Proponent Qualification Phase;
- j) “**Contract Negotiation Phase**” means Phase 4 of this JSP which commences upon the Province indicating that it is prepared to start negotiation of the Final Contract with the Successful Proponent and ends upon the execution of the Final Contract;
- k) “**Corporate Software**” means a type of Client-Line of Business Software that is being used by two or more Clients, as more particularly described in Appendix G;
- l) “**Core Software**” means commercially available software that is or will be installed on every Workstation, as more particularly described in The Appendix F;
- m) “**DTS**” means desktop terminal services including those applications that are accessible from a Workstation but which are hosted remotely from the Workstation;
- n) “**Due Diligence & Negotiation Phase**” means Phase 3 of this JSP which commences upon an invitation being extended by the Province to the Successful Proponent to enter into Phase 3 of this JSP and ends upon the Province indicating that it is prepared to start negotiation of the Final Contract with the Successful Proponent;
- o) “**Equipment**” means Workstations and Peripherals;
- p) “**FTE**” means the Province’s equivalent of the hours attributed to a full time employment position (i.e. one FTE equals 1827 hours per year);
- q) “**Final Contract**” means the written agreement executed by the Province and the Successful Proponent resulting from completion of the Contract Negotiation Phase;
- r) “**IMAC**” means install, moves, adds, and changes to Equipment and Core Software, Supported Software and Client-Line of Business Software;
- s) “**Joint Solution Definition Agreement**” means the agreement that will be entered into by the Province and each Preferred Proponent prior to the Joint Solution Definition Phase which will include the provisions described in Appendix C;
- t) “**Joint Solution Definition Phase**” means Phase 2 of this JSP which commences upon invitations being extended to Preferred Proponents to enter into Phase 2 of this JSP and ends upon an invitation being extended by the Province to one of the Preferred Proponents to become the Successful Proponent;
- u) “**JSP**” means the Joint Solution Procurement Process for the Project;
- v) “**JSRFP**” means this document relating to the Proponent Qualification Phase of the JSP;
- w) “**Letter of Intent**” means the letter of intent that will be entered into by the Successful Proponent and the Province prior to the Due Diligence & Negotiation Phase;

- x) **“Ministry”** means the Ministry of Management Services as may be reconstituted, renamed or otherwise reorganized by the Province from time to time;
- y) **“Ministries”** means all ministries within the Province;
- z) **“Must”, or “mandatory”** in respect of evaluation criteria means a requirement that must be met in order for a Proposal to receive consideration;
- aa) **“Partner”** means the Successful Proponent who enters into the Final Contract with the Province and works with the Ministry in a Business Alliance, but not necessarily a legal partnership, in achieving the Project’s objectives;
- bb) **“PDA”** means a personal digital assistant device (such as a Palm Pilot or Blackberry);
- cc) **“Peripherals”** means the printers, plotters, PDAs, multi-function digital output device, digital cameras and other devices;
- dd) **“Preferred Proponents”** means the Proponents who are invited by the Province to advance to the Joint Solution Definition Phase and who sign the Joint Solution Definition Agreement;
- ee) **“Project”** means the Workplace Support Services project as described in this JSRFP document;
- ff) **“Proponent”** means the entity that submits, or intends to submit, a Proposal in response to this JSRFP, and where the Proposal consists of a joint submission with Subcontractors or contemplates the use of Subcontractors in the Final Contract, as the case may be, then the Proponent will be the individual entity that acts as the lead entity responsible for the Proposal as more particularly described in section 1.2.2.26;
- gg) **“Proponent Qualification Phase”** means Phase 1 of this JSRFP which commences upon the release of this JSRFP and ends upon invitations being extended by the Province to Preferred Proponents to enter into the Joint Solution Definition Phase;
- hh) **“Proposal”** means the written submission required for Stage 1 of the Proponent Qualification Phase;
- ii) **“Province”** means Her Majesty the Queen in Right of the Province of British Columbia as represented by the Ministry;
- jj) **“Seat Cost”** means the price of providing the Workplace Support Services to an individual Workstation and associated Peripherals expressed in Canadian dollars per month;
- kk) **“Seat Management”** means the management, and pricing of integrated Workplace Support Services on a per Seat Cost basis;
- ll) **“Shared File, Print and Storage”** means the service provided by CITS, which includes the supporting infrastructure for file storage and printing, related access management, and print queue management;
- mm) **“Should” or “desirable”** in respect of evaluation criteria means a requirement having a significant degree of importance to the objectives of the Project;
- nn) **“Software Distribution”** means the distribution and installation of software on Equipment;
- oo) **“Solution”** means the method and framework that is developed during the Joint Solution Definition Phase in response to the Project objectives;
- pp) **“Stage 1”** means the initial stage of the Proponent Qualification Phase during which written Proposals will be created by Proponents and evaluated by the Province;
- qq) **“Stage 2”** means the second stage of the Proponent Qualification Phase during which up to four Proponents will be asked to participate in separate Workshops with the Province;
- rr) **“Stage 3”** means the final stage of the Proponent Qualification Phase during which the Proponents who participated in the Workshops will present their Concepts to the Province, both orally and in writing;
- ss) **“Subcontractors”** mean entities that submit, or intend to submit, a joint proposal with a Proponent or are retained by the Partner to perform certain services in respect of the Final Contract as more particularly described in section 1.2.2.26;
- tt) **“Successful Proponent”** means the Preferred Proponent who is invited by the Province to advance to the Due Diligence & Negotiation Phase and who signs a Letter of Intent;
- uu) **“Supported Software”** means software that is or will be installed on selected Workstations, is fully supported, is licensed, and is centrally managed (e.g. installation, re-installation, patches, and upgrades), as more particularly described in Appendix H;
- vv) **“Thin Client”** means a centrally-managed device with no end user access to the local drive and connecting to a DTS;
- ww) **“Workplace Support Services”** means the services required by the Province as defined in this JSRFP document and as more particularly described in section 2.2.1;
- xx) **“Workshops”** means the working sessions between a Proponent and the Ministry during Stage 2, as more particularly described in section 4.1.4; and
- yy) **“Workstation”** means a desktop computer, laptop, or Thin Client, each configured with Core Software, and, where applicable, Supported Software and/or Client-Line of Business Software.

1.1.2 JSRFP Process – Proponent Qualification Phase

1.2.2.1 Terms of the Proponent Qualification Phase

This JSP will consist of four phases:

- Proponent Qualification Phase;
- Joint Solution Definition Phase;
- Due Diligence & Negotiation Phase; and
- Contract Negotiation Phase.

The following terms apply to the Proponent Qualification Phase of this JSRFP. In consideration of the Province's preparation of this JSRFP document, in conducting the JSRFP and the Proponents' opportunity to submit a Proposal, each Proponent hereby acknowledges and agrees by submitting a Proposal in response to this JSRFP that the Proponent is accepting and agreeing to be bound by the terms of this JSRFP. Provisions in a Proposal that conflict or are inconsistent with any of the terms of this JSRFP shall be of no force or effect.

1.2.2.2 Proponent Qualification Phase Process

The Proponent Qualification Phase will consist of three stages:

- (a) **Stage 1** – During this stage Proponents will submit written Proposals in accordance with the terms of this JSRFP. The Province will evaluate each Proposal. The Province will select up to four Proponents to advance to Stage 2 of the Proponent Qualification Phase based upon the Province's evaluation of the Proposals;
- (b) **Stage 2** – During this stage Workshops will be held with up to four Proponents that have advanced from Stage 1. Subject to the terms of this JSRFP, each of the Proponents from Stage 2 will advance to the Stage 3 of the Proponent Qualification Phase, and;
- (c) **Stage 3** - During this stage each of the Proponents who have advanced from Stage 2 will present their Concepts to the Province. The Province will initially select up to two Proponents who will become Preferred Proponents and will advance to the Joint Solution Definition Phase.

Neither the acceptance by the Province of any Proposal, the conducting of any Workshop nor the receipt by the Province of any Concept in any format whatsoever shall under any circumstances cause any express or implied commitment or undertaking on the part of the Province to advance any Proponent to the next Stage or Phase, to receive any presentation from a Proponent, to

acquire services, to undertake any form of transaction or to continue the JSRFP process.

1.2.2.3 Receipt Confirmation Form

Proponents are advised to fill out and return the attached Receipt Confirmation Form immediately. Only those Proponents who return a fully completed Receipt Confirmation Form will be notified of any subsequent information relating to this JSRFP, including any changes made to this document. Subsequent information will be distributed by the Province to a Proponent in accordance with the method authorized on the Proponent's Receipt Confirmation Form.

Notwithstanding the foregoing, Proponents who have returned the Receipt Confirmation Form may be notified that certain additional information is available. Additional confidential documents may be made available for viewing in a Restricted Document Room that may be established by the Province in Victoria. The responses to any enquiries regarding such additional information will be provided by email or facsimile at the Province's discretion.

1.2.2.4 Enquiries

All enquiries related to this JSRFP are to be directed, in writing, to the person set forth below. Information about this JSRFP obtained from any other source is not official and should not be relied upon. Enquiries and responses will be recorded and may be distributed to all Proponents at the Province's option.

Patrick Ngo,
 Manager, Commercial Services
 Strategic Acquisitions & Technology Procurement Branch
 E-Mail: Patrick.Ngo@gems7.gov.bc.ca
 Fax: (250) 387-1399

The Province has no obligation to ensure consistency between each of the Workshops or each of the Concept presentations. Accordingly, during Stages 2 and 3, questions and responses exchanged between the Province and one Proponent may differ from questions and responses exchanged between the Province and any other Proponent. The Province does not intend to share the questions or answers that are exchanged with a Proponent during Stages 2 and 3 with any other Proponents; however, if a Proponent makes a request for information during a Workshop that the Province determines to be a request for basic information that should be made available to all Proponents, then the Province, in its sole discretion, may distribute that basic information to all Proponents participating in the Workshops.

1.2.2.5 Closing Date and Time

Ten complete hard copies of the Proposal and one electronic copy on CD must be delivered by hand or courier, and received prior to **2:00 PM, Pacific Time, on Monday January 26, 2004** at:

Procurement Services
Ministry of Management Services
102 – 3350 Douglas Street
Victoria, B.C., V8Z 7X9

Attention: Patrick Ngo

Proposals must not be sent by mail, facsimile or email. Proposals and their envelopes should be clearly marked with the name and address of the Proponent, the JSRFP number, and the project name.

1.2.2.6 Late Proposals

Proposals will be marked with their receipt time at the closing location described in section 1.2.2.5 above. Late Proposals will not be accepted and will be returned to the Proponent. In the event of a dispute, the Proposal receipt time as recorded at the closing location will prevail whether accurate or not.

1.2.2.7 Signed Proposals

The Proposal must be signed by a person authorized to sign on behalf of the Proponent and to bind the Proponent to the terms of this JSRFP and any statements made in response to this JSRFP. The Proponent should ensure that the Proposal includes a letter or statement(s) substantially similar in content to the sample Proposal Covering Letter provided in the Appendix A.

1.2.2.8 Changes to Proposals

By submission of a clear and detailed written notice, the Proponent may amend or withdraw its Proposal prior to the closing date and time. The Proponent cannot change the wording of its Proposal after closing and no words or comments will be added to the Proposal after closing unless requested by the Province for purposes of clarification, or to correct minor defects pursuant to section 1.2.2.16 below.

1.2.2.9 Eligibility

A Proposal will not be evaluated if the Proponent's current or past corporate or other interests may, in the Province's opinion, give rise to a conflict of interest in connection with the Project. Subcontracting to any firm or individual whose current or past corporate or other interests may, in the Province's opinion, give rise to a conflict of interest in connection with the Project, will not be permitted. The Province may also remove a Proponent from any later stage of the Proponent Qualification Phase where the Province determines, in its opinion, that such Proponent's current or past corporate or other interests may give rise to a conflict of interest in connection with

the Project. Any such determination by the Province of a conflict of interest shall be final and shall be based upon such information as the Province in its sole discretion determines to be relevant.

1.2.2.10 Evaluation Committee

A committee formed by the Province will undertake the evaluation of Proposals; the committee may include employees and contractors. The evaluation committee may consult with such technical advisors, including financial, legal, operating, marketing and other experts, as the evaluation committee may, in its discretion, determine to be necessary. The Province in its sole discretion may expand the evaluation committee during Stages 2 and 3.

1.2.2.11 Evaluation

The evaluation committee will check Proposals against the mandatory criteria. Proposals that do not meet all of the mandatory criteria will be rejected without further consideration. Proposals that do meet all of the mandatory criteria will also be evaluated against the desirable criteria. The Workshops and Concepts will be evaluated against the criteria described in this JSRFP.

1.2.2.12 Debriefing

At the conclusion of Stage 1, Proponents who are not invited to advance to Stages 2 and 3 of the Proponent Qualification Phase will be so notified in writing, and may then request a debriefing meeting with the Province, which will be scheduled by the Province after the Preferred Proponents have been announced. Proponents who will not be invited to participate in the Joint Solution Definition Phase will be so notified in writing at the end of the Proponent Qualification Phase, and may then request a debriefing meeting, which will be scheduled by the Province following the conclusion of the Contract Negotiation Phase.

1.2.2.13 Proponent Expenses

Proponents are solely responsible for their own expenses in preparing a Proposal and for participating in any or all Stages of the Proponent Qualification Phase including, without limitation, if the Province elects to reject all Proposals or to not ask any Proponents to advance to the Joint Solution Definition Phase. In no event will the Province or any of its employees, representatives or contractors be liable to any Proponent for any claims, whether for costs or damages incurred by the Proponent in preparing the Proposal, or in preparing for or participating in Stages 1, 2 or 3, or any Phase of this JSP, or for any loss of opportunity, loss of anticipated profit in connection with any Final Contract (whether or not the Final Contract is awarded to the Proponent or at all), or for any other loss, damage or claim of any kind whatsoever relating in any way to all or any portion of the JSRFP for the JSP.

1.2.2.14 Limitations of Damage

Further to the preceding paragraph, the Proponent, by submitting a Proposal, agrees that it will not claim for any loss, costs or damages, for whatever reason, relating to the Final Contract (whether or not the Final Contract is awarded to the Proponent or at all) or in respect of the Proponent's preparation for or participation in, or failure to be invited to participate in, any one or more Stage or Phase of this JSRFP or JSP. If, contrary to the terms of this JSRFP the Province should be held liable for any reason whatsoever (whether in contract or in tort) for any of the foregoing losses, costs or damages, then such losses, costs or damages shall not, in any circumstances, exceed an amount equivalent to the reasonable costs incurred by the Proponent in preparing its Proposal.

1.2.2.15 Right of the Province to Check References

The Province reserves the right to verify a Proponent's references at any Stage in the Proponent Qualification Phase.

1.2.2.16 Correction of Minor Defects

The Province reserves the right, in its sole discretion, to correct minor defects in the Proposals or Concepts.

1.2.2.17 Acceptance of Proposals

This JSRFP should not be construed as an agreement to purchase goods or services. The Province is not bound to enter into any contract with any Proponent including, without limitation, any Proponent who submits the lowest priced Proposal or Concept. Proposals and Concepts will be assessed in light of the evaluation criteria described or referenced in this JSRFP. The Province will be under no obligation to receive further information, whether written, oral, or otherwise, from any Proponent at any Stage in the Proponent Qualification Phase.

1.2.2.18 Restriction on Contact/No Lobbying

Proponents must not attempt to communicate directly or indirectly with any employee, contractor or representative of the Province, including the evaluation committee, or with members of the public or the media about the Project during the Proponent Qualification Phase, other than as expressly directed or permitted by the Province.

1.2.2.19 No Contract

By submission of a Proposal, Proponents agree that no Proponent will acquire any legal or equitable rights or privileges relative to the Project prior to the full execution of a Final Contract. Further, the Province reserves the right not to enter into a Final Contract with any of the Proponents.

1.2.2.20 Liability for Errors

While the Province has used considerable efforts to ensure an accurate representation of information in this JSRFP, and provided pursuant to this JSP, the information is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the Province, nor is it necessarily comprehensive or exhaustive. Nothing in this JSRFP is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in this JSRFP.

1.2.2.21 Modification of Process or Project

The Province reserves the right to modify the JSP, this JSRFP or the Project at any time in its sole discretion. This includes, but is not limited to, the right to cancel this JSRFP at any time, to extend the closing time, change the number of Proponents asked to advance to any Stage of this JSRFP or any Phase of this JSP, re-commence a Stage or Phase of this JSRFP or JSP, alter the Project requirements or make other changes to the process or to a term set out in this JSRFP. If a modification is communicated to the Proponents prior to closing time, it is the Proponents' sole responsibility to ensure that they make appropriate use of that information.

1.2.2.22 Ownership of Proposals

All documents, and electronic media, including the Proposals and Concepts, submitted to the Province become the property of the Province. The Province may make such copies as the Province may require for evaluation purposes. All Proposals and Concepts will be received and held in confidence by the Province, subject to the provisions of the *Freedom of Information and Protection of Privacy Act* and this JSRFP. The Province does not intend to share a Proponent's Concept with the other Proponents; however, the Province will in no way be liable or responsible if another Proponent subsequently suggests a framework or idea similar to one contained in a Concept that was originally submitted by another Proponent.

1.2.2.23 Use of JSRFP Document

No portion of this document, nor any information supplied by the Province in relation to this JSRFP, may be used or disclosed by a Proponent in any manner other than for the sole purpose of submitting a Proposal and participating in the JSP.

1.2.2.24 Working Language of the Province

The working language of the Province of British Columbia is English and all responses to this JSRFP must be in English.

1.2.2.25 Legislative References

A reference to a statute, and any definition of a statute, includes each amendment to the statute, any statute which supplements or supercedes the statute and each regulation made pursuant to any such statute or amendment, all as the same may be in force from time to time.

Subcontractor may have or previously has had with Borden Ladner Gervais LLP.

1.2.2.26 Proposals with Joint Submissions or Subcontractors

A Proponent may submit a Proposal consisting of a joint submission by the Proponent together with one or more other entities, or which proposes the use of Subcontractors in the Final Contract. In either case, the Proponent will be the only party responsible to the Province for the Proposal, will act as the liaison and main contact with the Province in respect of the Proposal, this JSRFP and the JSP, and will take overall responsibility for the successful inter-relationship among the Proponent and the other entities involved in the joint submission, or contemplated as Subcontractors, as the case may be. The Province will have no obligations with respect to those other entities or Subcontractors under this JSRFP, the JSP, the Final Contract or otherwise.

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1.2.3. JSRFP Process – Joint Solution Definition Phase

Prior to participation in the Joint Solution Definition Phase, the Province will enter into a Joint Solution Definition Agreement with each of the Preferred Proponents, which will include the provisions described in Appendix B as well as such other provisions as may be determined by the Province, in its discretion, to be necessary, desirable or useful.

1.2.4. JSP Process – Due Diligence & Negotiation Phase

The Due Diligence & Negotiation Phase will substantially follow the process described in section 4.3 below.

1.2.5. JSP Process – Contract Negotiation Phase

The Contract Negotiation Phase will substantially follow the process described in section 4.4 below.

1.2.6. Legal Consent

Borden Ladner Gervais LLP has provided and continues to provide legal advice to the Province in respect of this JSRFP, the JSP and the Project. By submitting a Proposal in response to this JSRFP, the Proponent is expressly consenting to and, to the extent applicable, will cause all of its Subcontractors to expressly consent to, Borden Ladner Gervais LLP continuing to act for the Province in respect of this JSRFP, JSP and the Project, notwithstanding any unrelated solicitor-client relationship that the Proponent or any

1.2 OVERVIEW

1.2.1 Ministry of Management Services Mandate

The Ministry oversees and ensures that British Columbians have access to government when, how and where they need it. The Ministry strives to enhance service delivery by developing more convenient, citizen-centered and integrated services. The Ministry plays a key role in the implementation of the Province's priorities and its job is to bring down the costs of the Province's internal operations so that resources can be freed up for direct services to the taxpayers of British Columbia. The Ministry's main focus is to implement a shared services delivery model for the Province and expand it to the broader public sector over time. In the context of this Project, the Ministry is representing the interests of the Province as the current provider of Workplace Support Services.

1.2.2 The Ministry's Commitment to the Project

The Ministry has assembled a core team of experts that will be dedicated to the Project and who are supported by project sponsors at the highest level in the Ministry's organization, being the Ministry's executives and representatives of the Province. These sponsors will adopt an increasingly dedicated role in the JSP as the selection process proceeds through the Joint Solution Definition Phase and subsequent Phases as described in this document. The Ministry has assigned a member of CITS' senior management team to oversee the Project on a full-time basis. The Deputy Minister is committed to providing the resources necessary to actively participate in the selection process and all other phases of this JSP. The Project team includes senior personnel with extensive experience in the management of major projects and in-depth understanding of Workplace Support Services. Further, key resources from the business and services side of the Province will be hand-picked and assigned to the Project Team to provide representative Client input.

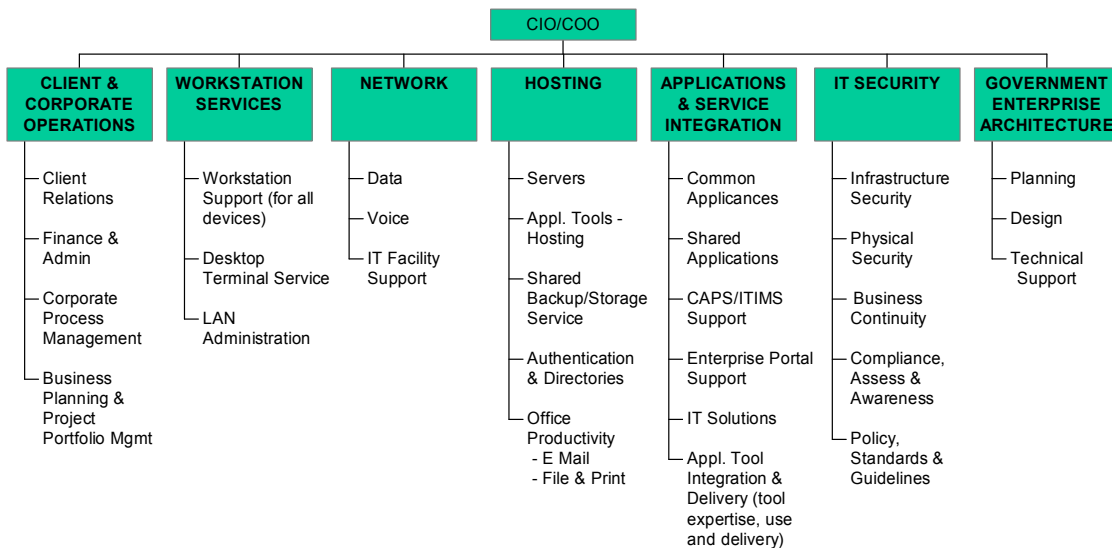
1.2.3 Common IT Services (CITS)

CITS is responsible for the management of the government's common information technology infrastructure, which includes:

- Workplace Support Services;
- Data center services;
- Telecommunication services;
- IT infrastructure security and anti-virus protection services;
- Electronic mail and directory services;
- Common IT help desk;
- Electronic service delivery; and
- Cross-government application support.

For more information see: <http://cits.gov.bc.ca/> CITS comprises seven branches as illustrated below:

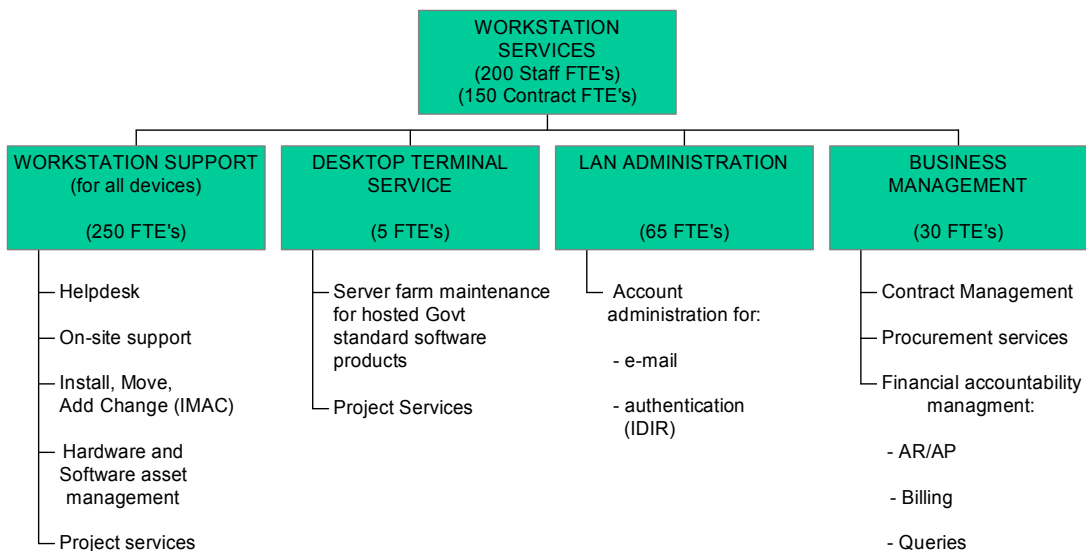
Common IT Services



1.2.4 Workstation Services Branch

CITS created the Workstation Services Branch whose mandate includes centralizing Workplace Support Services and related service and project requests. The Branch functions as a single point of contact for all Workstation incidents, procurement requests and change orders. CITS was asked to produce a per Seat Cost model for Workstation Support Services that will follow typical industry Seat Management methodologies. This model will commence in April 2004. An organization chart is illustrated below.

Workstation Services Branch



2 DEFINING THE OPPORTUNITY

2.1 PROJECT OBJECTIVES

The Project is focused on the selection of a long-term Partner for the delivery of Workplace Support Services for Clients. The current Client base for Workplace Support Services consists primarily of the Ministries and other entities under contract to CITS.

The Project is expected to achieve the following objectives:

Objective 1:

Ongoing reduction of annual Seat Cost from the Seat Cost for 2004/05 fiscal year.

Objective 2:

Implement rapid advancement of standardization of Equipment and regionalized service levels.

Objective 3:

A high rate of continual improvement in service levels to achieve Best-in-Class standards as soon as possible.

Objective 4:

Establish and maintain positive and productive working relationships with the Ministry and its Clients.

Objective 5:

Enable a rapid transition to the new service delivery model.

2.2 PROJECT SCOPE

2.2.1 In Scope

The Project covers the design and delivery of a new Workplace Support Services model that will quickly deliver on the Project's objectives as described above. The Province intends that there will be approximately 17,000 Workstations included at the commencement of the Final Contract for the Workplace Support Services. The number of Workstations may fluctuate during the term of the Final Contract as follows:

- Expected addition of 6,150 Workstations from the Ministry of the Attorney General and Minister Responsible for Treaty Negotiations, Ministry of Public Safety and Solicitor General in April 2005;
- Expected addition of 1,300-4,200 Workstations from the Ministry of Children and Family Development in April 2005;
- Possible workforce adjustments; and
- Possible addition of new clients or loss of existing non-ministry Clients.

The Project includes transformation of the Workplace Support Service from the current state to a new Workplace Support Services model. The Solution will include a plan for the following and whether they will be financed by the Province or the Partner or both:

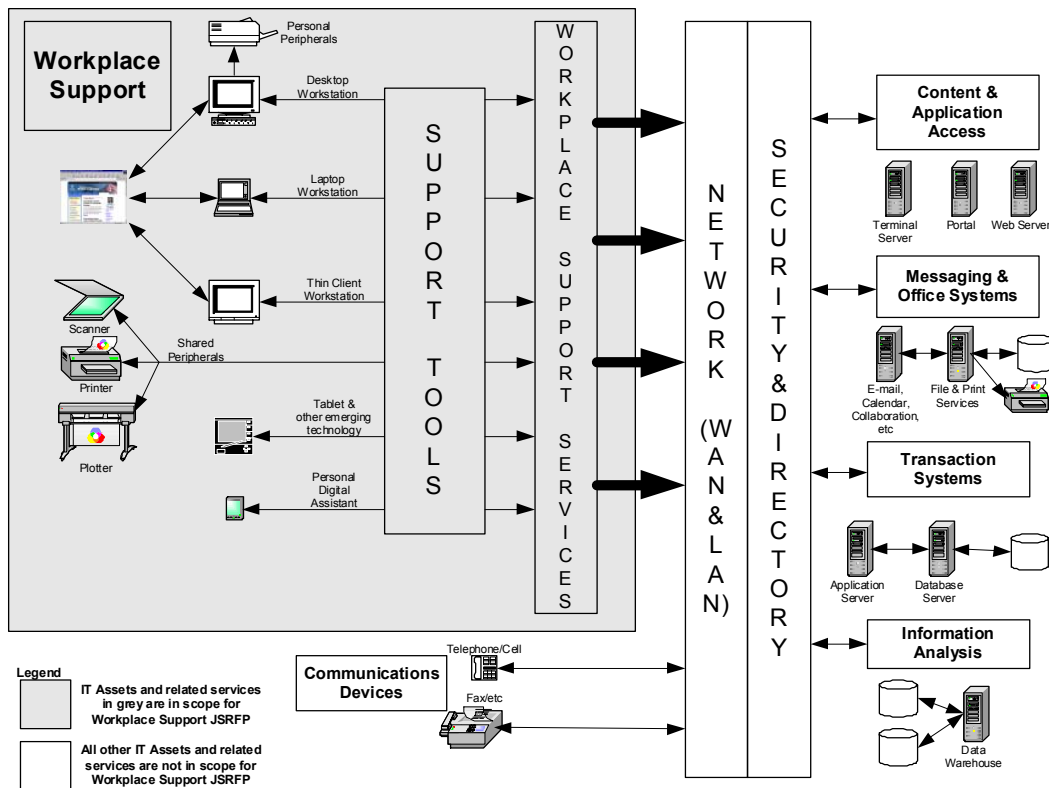
- Any potential Equipment acquisition, refresh or repurposing;
- Potential ownership of the Equipment;
- Integration with approximately 30 Client operated helpdesk and service desks;
- Implementation activities;
- Potential workforce adjustment; and
- DTS servers and related software delivering Core and Support Software.

2.2.1.1 Workplace Support Services:

The Workplace Support Services currently includes the following services for the Equipment, Core Software and Supported Software:

- (a) **Basic Services for Asset Management** (as more particularly described in Appendix D)
 - Service management escalation
 - Onsite services management;
 - Helpdesk;
 - Onsite service support;
 - IMAC co-ordination;
 - IMAC execution;
 - Order management;
 - Local Area Network administration at the Workstation for local physical connectivity support;
 - Base technology engineering services;
 - Self help and knowledge base;
 - Asset Inventory management;
 - Software asset tracking;
 - Deployment services (including stock management and image management); and
 - Security relating to Workplace Support Services ID administration and internet access.
- (b) **Additional Workplace Support Services**
 - Core Software and Supported Software installed on non-Client Equipment;
 - Product evaluation;
 - Third-party drivers and services;
 - Non-standard Equipment support (such as tablets and other emerging technologies); and
 - Management of major projects.

The following diagram illustrates Workplace Support Services and their interrelation with other CITS services.



2.2.2 Out of Scope for the Project

The infrastructure, network and Client specific items more particularly described below are not included in the scope for the Project; however the Partner will need to link its Solution into these elements:

- CITS common services (e.g. Exchange, Shared File, Print and Storage, Blackberry Server, etc.);
- Data network (defined as everything upstream from the Client side data port on the Wide Area Network router);
- Client-Line of Business Software (e.g. development, maintenance, support, deployment, preparation, 30 Client operated helpdesks and service desks, etc.);
- Voice telecommunications which include:
 - Cell phone;
 - Land lines, and
 - Stand-alone fax machines;
- Stand-alone photocopiers;
- Messaging/Email;
- Storage and backup;
- Security / identity and access management;

- Spending authority approval for any capital expenditure by government will remain within the Province; and
- Final approval for standards for Equipment and software.

2.2.3 Related Projects

The Project has a number of interdependencies with other projects currently underway or planned within government. During the course of the JSP process, the impact of these other projects on the Project will need to be assessed, and if appropriate, factored into Proponents' Solution. These other projects include:

Project	Description
Strategic Sourcing	Consolidation of purchasing contracts and processes across government.
Digital Divide	Extension of government's data and communications network throughout the province.
Government Authentication Project	Development of a strategy and framework for public and internal access to government networks and systems.

2.2.4 Current State and Recommendations

This section provides a general overview of the technical, physical and managerial infrastructure included in the Project, based upon available information at the time of issuing this JSRFP. Currently the Workstations Services Branch within CITS manages approximately 31,000 Workstations through approximately 200 government FTE's and 150 contractor FTE's. Appendix D provides further detail on the current Workplace Support Services. Further information will be made available in the "Clean Room" during the Joint Solution Definition Phase.

In July 2002, the report entitled *Workplace Support Recommendations v1.1* (the recommendations sections only is attached in the Appendix E) was prepared by CITS to support the establishment of the shared services model for the Province. The report set out a series of strategic recommendations on the following (which have been confirmed and agreed to by the majority of Ministries):

- Standardization of basic services and improvement of associated service levels;
- Standardization of Workstation configuration management;
- Centralization of IT service desks; and
- High-level implementation strategy.

The service levels set out in the *Workplace Support Recommendations v1.1* report have not been implemented on a government-wide basis. The report provides a starting point for Proponents who will be asked to align their Solutions to a service design consistent with the recommendations.

2.2.5 Key Issues

2.2.5.1 Coordination of Workplace Support Services

Historically the management of Workplace Support Services has varied from Client to Client. Attempts to centralize Workplace Support Services are underway as a mechanism to reduce overall costs to government. The Province's current ability to respond to Workplace Support Services changes and other incidents is often lacking co-ordination.

2.2.5.2 Geographic Dispersion

There are approximately 1,400+ government offices ranging in size from a single staff member occupying non-government facilities to space for over 1,000 staff in government owned and managed facilities. These offices are widely scattered throughout the province, with approximately 60% of the Client base located in urban centers. The remaining 40% are viewed as critical 'front-line' service offices that connect the rural and remote citizens of BC to their government. Regular access to these rural offices is challenging due to the large distances between the offices, which is compounded by weather conditions that complicate road, air and water based travel. As a result, the desk-side support by trained IT support staff varies greatly from Client to Client and geographic region to region. For example, the town of Bella Bella located near the province's northwest coast is sometimes inaccessible between November and March due to snow and wind conditions. Special arrangements with local IT vendors have been key to hardware maintenance in Bella Bella as a part of business continuity and disaster recovery.

2.2.5.3 Service Level Agreements

Service level agreements between Clients and their Workplace Support Services providers have been sporadic in their development and implementation. The service level agreements which are described as "To Be" in the *Workplace Support Recommendations (v1.1)* attached as Appendix E provide a service level target for the Workplace Support Service. There is a process and cultural challenge to be met in implementing these service level agreements.

2.2.5.4 Mixed Support Model

Outsourcing of Workplace Support Services has occurred in some areas of government over the last five years. As a result, a variety of external service providers now support, to some degree, over 60% of government Workstations. Contractual terms and conditions vary from Client to Client as each arrangement was negotiated separately. The majority of these contracts are set for renewal in April 1, 2004 and can be terminated with 10 to 30 days notice.

2.2.5.5 New Equipment Acquisition

Equipment serviced by the Workplace Support Services varies considerably as a result of historical purchasing practices at the individual Client level. Workstation Services Branch is attempting to rely on existing Equipment and maintain the status quo during the JSP process by minimizing its expenditures on new Equipment.

2.2.5.6 Diminishing Workforce

The number of Workstations is expected to decrease by approximately 10% over the next 24 months as a result of a diminishing workforce. Current plans for surplus Equipment as a result of adjusting the workforce include:

- Redeploying all Equipment under three years of age to retire Equipment over five years of age; and
- Potentially repurposing older Workstations as Thin Client access terminals to extend their useful life.

2.2.5.7 Software Standardization

There is a wide array of software within the Client base resulting in the lack of standardization. One Client's recent review of its Workstation software inventory suggests there are over 300 products installed with an average of two versions for each product. Other Clients are considered equally complicated and diverse. If required macros and templates are included, a rough estimate suggests there are over 2,000 applications in use in government today.

2.2.5.8 Multiple Helpdesks and Service Desks

There are approximately 400,000 incidents reported to government helpdesks and service desks each year. Roughly 10% of these incidents result in some form of desk side visit. Workplace Support Services helpdesk and service desk functions for IT related incidents have been centralized to CITS. Client-Line of Business Software have remained with the Clients and are supported through multiple Client operated helpdesks and service desks. The Partner will be expected to integrate the management and tracking of incidents and requests in a timely manner across these 30 Client operated helpdesks and service desks.

2.2.5.9 Data Security

Information related to the Workplace Support Services is confidential and proprietary to the Province and its non-ministry Clients. Confidentiality must be continually maintained.

2.2.5.10 Physical Security

Client office locations demand a varying level of security for their Asset Inventory. Office security ranges from general purpose sites with access by members of the general public to highly secured environments such as correctional institutions and politically sensitive facilities like the Legislative Parliament buildings in Victoria. Clients all participate in the protection of their Asset Inventory that includes security-monitored warehouses, modern identification badge and access card technology, locked wiring closets, and strict access approval lists.

2.2.5.11 Workstation Security

Workstation Services Branch is committed to delivering a secure workstation to all of its Clients. Core Software and Supported Software patching services are considered basic and essential to delivering the services. Patching practices across the Province have varied over time. This fact is supported by an October 2003 survey of Workstations (detailed in Appendix D) that indicated not all Workstations are currently up-to-date. Personal firewall software is rarely used but does occur where Client business requirements exceed standard operating thresholds.

2.2.5.12 Chief Information Officer, Ministry of Management Services

The Chief Information Officer sets information management and IT standards for government which could impact the nature of Equipment, Core Software, Supported Software and Client-Line of Business Software. The Chief Information Officer will maintain this role over the term of the Final Contract.

2.2.5.13 Office of the Comptroller General, Ministry of Finance

The Office of the Comptroller General, under the direction of the Comptroller General has overall responsibility, under the *Financial Administration Act*, for the financial system within the Province. This includes the establishment and maintenance of appropriate financial policies and controls across the Province. The Office of the Comptroller General also has the right to undertake financial control and other performance audits as required. This includes following the flow of public monies disbursed through other organizations and contractors. Any changes to financial policies and controls by the Office of the Comptroller General may have an impact on the reporting requirements under the Final Contract.

2.2.5.14 Information & Privacy Commissioner, Ministry of Management Services

All records of the Province within the control of a public body as defined in the *Freedom of Information and Protection of Privacy Act* are subject to the provisions of the Act. The Act authorizes access to records except in specific circumstances and governs the collection, use and disclosure of records held by the Province. As required by the Act, the Information, Privacy, Security and Records Services Section,

Ministry of Finance, will conduct a Privacy Impact Assessment on this Project prior to the Due Diligence & Negotiations Phase and will update it during the term of the Final Contract. The Privacy Impact Assessment may impact the Solution and the Final Contract.

2.3 POLICY & COMPLIANCE

2.3.1 Procurement Policy

The JSP process is a recognized approach described in the government's Core Policy Manual, URL as follows:

http://www.fin.gov.bc.ca/ocg/fmb/manuals/CPM/06_Procurement.htm#632

2.3.2 Privacy, Confidentiality and Information Management

Protection of privacy of personal information and confidentiality of information related to Workplace Support Services must be ensured. Accordingly, compliance with the *Freedom of Information and Protection of Privacy Act* and related policies and guidelines of the Province of British Columbia is required. Information on these policies is available at: <http://www.cio.gov.bc.ca>.

Information related to the Workplace Support Services must be maintained and managed in accordance with the Core Policy Manual. Issues related to privacy, confidentiality and information management will be dealt with in later Phases of the JSP process.

2.3.3 Labour Relations

CITS' employees are predominantly within union membership per the *Public Service Act*.

Issues related to labour relations will be dealt with in later Phases of the JSP process.

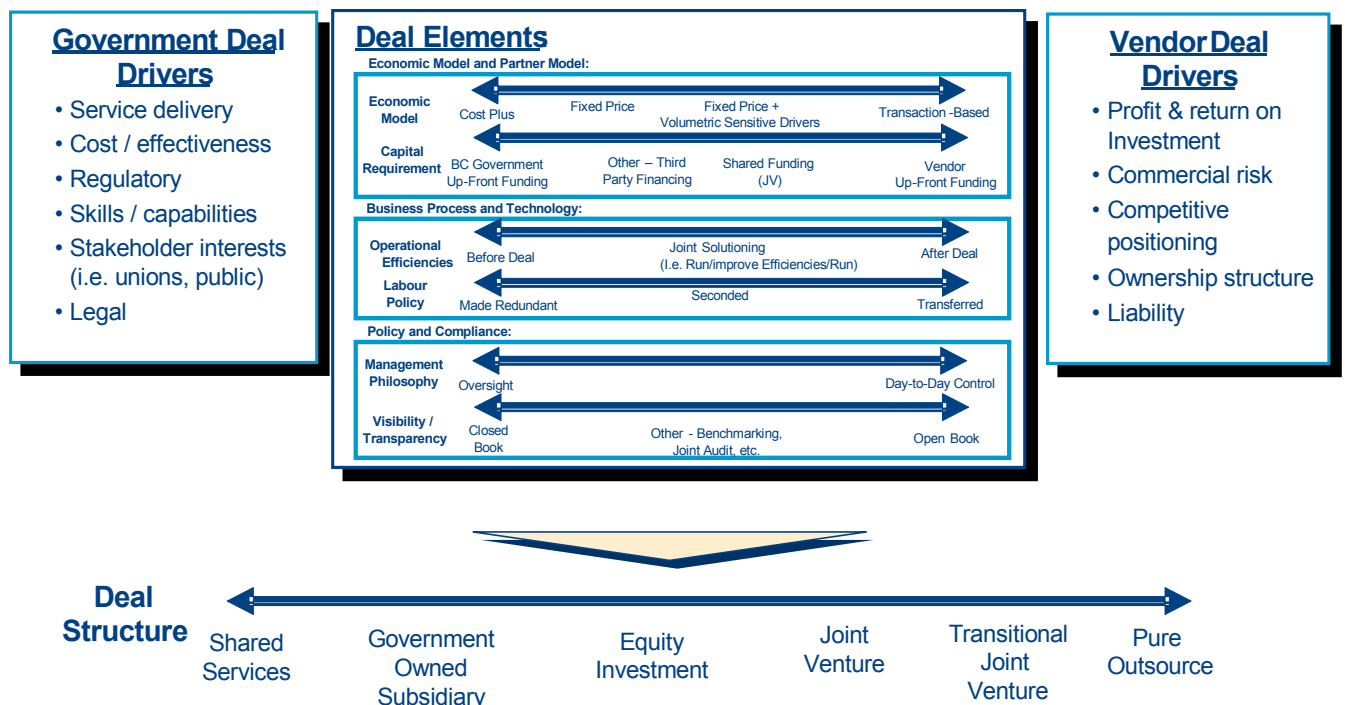
2.3.4 Other Policies and/or Regulations that May Impact the Solution

As part of the Joint Solution Definition Phase it is possible that specific legislation, policies and/or regulations that may interfere with a preferred Solution will be identified. The Province may, but is not obligated to, consider changing or creating the legislation, policies and/or regulations to effectively support the business case for the Solution and facilitate execution of a Final Contract. Issues related to government policy, legislation or other related regulations, if applicable, will be dealt with in later Phases of the JSP process.

2.4 DEAL STRUCTURE AND ECONOMIC MODEL

2.4.1 Deal Structure

Proponents should understand the business efficiencies and alternative service delivery opportunities with respect to the Project. The extent of the business efficiencies and alternative service delivery and the associated deal structure will depend on the solution possibilities arising out of the Joint Solution Definition Phase of the JSP process. The diagram shown below describes some potential commercial arrangements.



The deal structure resulting from the successful Solution will be a key driving force for the success of the long-term commercial arrangement between the Partner and the Province. The qualification process described in this JSRFP document will test the Proponent’s 3C’s mix to assess its qualifications in respect to the Project. The Joint Solution Definition Phase of the JSP process will allow both the Ministry and Preferred Proponents to explore prospective business efficiencies related to Workplace Support Services.

2.4.2 Economic Model

There are a variety of possible economic models that can arise from the Joint Solution Definition Phase of the JSP process. Proponents will be asked to describe past alternative services delivery projects and demonstrate to the Province their in-depth knowledge and experience in conceptualizing, designing, developing and operating economic models that are true to the spirit of the type of deal structures contemplated for the Project. This could range from a cost-plus model to a transaction based model or a combination of several models depending upon the various business processes under

consideration and the type of deal structure contemplated by the Proponent. The Province is particularly interested in pursuing a Seat Cost model. The allocation of risks and rewards between the Partner and the Province should be balanced for the Final Contract to be successful over the long term.

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3 OVERVIEW OF THE END-TO-END JSP PROCESS

3.1 DEFINITION

The JSP process is a multi-phased approach designed to select a Partner to work strategically with the Ministry from identification of Preferred Proponents through to joint development of a Solution and the subsequent delivery of services over a long-term relationship. Emphasis will be placed on making sure that the Partner brings an optimum combination of commitment, capacity, and capability to manage an alternative service delivery of the Workplace Support Services.

The JSP process is normally used in situations where a complex business problem exists and where no clear 'off the shelf' solution can be readily identified. Due to the nature of such projects, the various phases of the JSP process are designed to help leverage the combined capability and creativity of the Ministry project team and the private sector Preferred Proponents to create a Solution that effectively addresses the Project's objectives and desired business outcomes, while optimizing the total value to the Business Alliance during the term of the Final Contract.

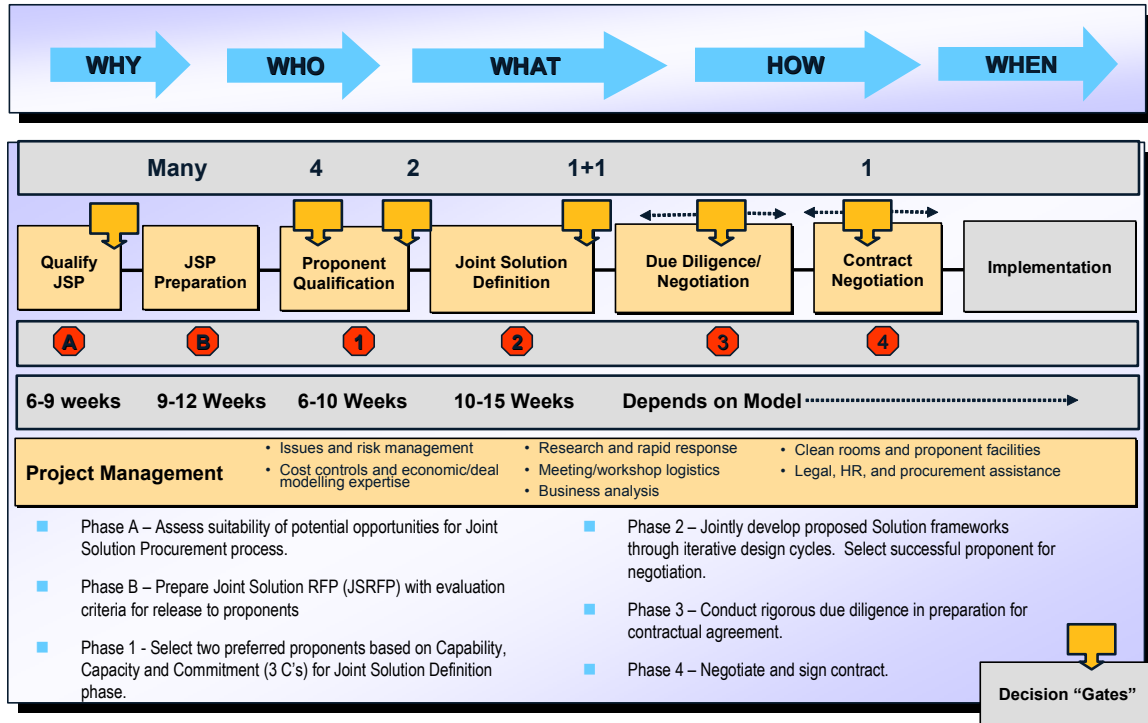
Unlike conventional procurement processes, a successful JSP process culminates with a long term Business Alliance that is adaptive in that it allows for creativity, flexibility and evolution over an extended period of time, typically five to ten years.

The JSP approach is structured to be consistent, open and competitive and includes activities in the Proponent Qualification Phase of the selection process that facilitate greater communication between Proponents and the Ministry.

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3.1.1 JSP Approach

The figure below illustrates the overall approach from JSP planning to the identification of a Successful Proponent.



It is the Province's expectation that the timetable in the above figure will be substantially reduced as indicated in section 3.1.2.

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3.1.2 Timetable

The Project will be conducted following the tentative timetable detailed below. The Ministry is interested in expediting the selection process to the maximum degree possible, and reserves the right to adjust the timetable as it sees fit.

Project Milestones	Anticipated Completion Date
Post JSRFP on BC Bid	December 12, 2003
Proponents Meeting*	December 19, 2003
JSRFP closes	January 26, 2004
Short-listed Proponents Notified	February 9, 2004
Stage 2 Workshops for Short-listed Proponents	February 11/12, 2004
Concept Presentations	February 16-18, 2004
Notify Preferred Proponents	February 27, 2004
Joint Solution Definition Phase <ul style="list-style-type: none"> • Discovery Phase • Business & Technology • Economic Model • Deal Structure • Policy • Solution Definition 	March 16-April 15, 2004
Solution Presentation	April 18-April 22, 2004
Solution Evaluation	April 25 – May 6, 2004
Notify Successful Proponent	May 9-May 13, 2004
Due Diligence & Negotiation Phase	TBA
Contract Negotiation Phase	TBA
Final Contract Signed	TBA

* No new questions, after the Proponents Meeting, will be answered prior to January 5th.

3.2 KEY SUCCESS FACTORS

3.2.1 Mutual Understanding and JSP Structure

The JSP process is an intensive procurement approach that requires patience and commitment by all parties to ensure its success. The process allows Proponents more flexibility than commonly available during a conventional request for proposal. This includes, for Proponents, the ability to ask questions of Ministry staff (e.g., at Workshops) during the selection process and, for the Ministry, more latitude during the subsequent presentations. One key premise of the JSP process is that the selection of a Successful Proponent will focus on the optimum strengths that a Proponent could bring to the Business Alliance. The other key premise is that the Solution itself is jointly developed after the Preferred Proponents have been identified, which allows for some significantly innovative approaches (e.g., during the Joint Solution Definition Phase) to be developed in order to meet the desired business outcomes of the Project. Successful completion of the Joint Solution Definition Phase will be followed by a period of detailed due diligence and negotiations activities in the Due Diligence & Negotiation Phase. The Contract Negotiation Phase of the JSP process is marked by activities needed to finalize the Final Contract.

3.2.2 Sharing of Risks and Rewards

In order for a long-term Business Alliance to exist, both the prospective Partner, as well as the Ministry, will have to share the risks and rewards associated with the Project Solution. In order to assess the economic sharing of the risks and rewards, the Ministry is interested in understanding not only the Proponent's 3C's, but also any opportunities for sharing risks and rewards that may arise as a result of Business Alliance with the Partner. While the Ministry is looking for innovative economic sharing models, one simple example may be gain sharing; another is a Proponent's interest in assuming business risk for the Solution as a springboard for other opportunities. Proponents will be asked to demonstrate their ability to engage in this sort of arrangement as part of the Proponent Qualification Phase. Any details related to the economic sharing of risks and rewards in the Business Alliance and Final Contract will be formulated during the Joint Solution Definition Phase and finally negotiated as part of the Due Diligence & Negotiation and the Contract Negotiation Phases of the JSP process.

3.2.3 JSP Communications Protocol

Maintaining proper communications protocol throughout the JSP process is important in order to protect the integrity of the JSP procurement and the Project, as well as to protect the interests of the Proponents and Ministry. The following communication protocol will apply during the JSP process. The failure of a Proponent to adhere to the communication protocol may result in the Proponent being disqualified from the JSP process.

3.2.3.1 *During the JSRFP*

All communication related to the JSRFP should be referred to the government contact listed on the front page of this document.

3.2.3.2 *Workshops*

All communication related to the JSRFP should be referred to the government contact listed on the front page of this document. This excludes face-to-face communications with Proponents as part of the Workshops where communication with Ministry representatives is expected. Please note that the Ministry reserves the right to withhold information at the Workshops that may impact its negotiating position during the subsequent phases of the JSP process.

3.2.3.3 *Joint Solution Definition Phase*

The Ministry will establish an Information Control Office capable of providing information during the Joint Solution Definition Phase. Preferred Proponents may also request interviews with Ministry staff through the Information Control Office.

3.2.3.4 *Due Diligence & Negotiation Phase*

The Ministry will establish a list of staff capable of providing information during the Due Diligence & Negotiation Phase of the JSP process. The list may include access to project staff, subject matter experts and senior executives of the Ministry as well as the Deputy Minister. The Ministry is committed to making senior decision makers available during this Phase of the process to ensure that commercial elements are immediately discussed, resolved and agreed upon.

3.2.3.5 *Contract Negotiation Phase*

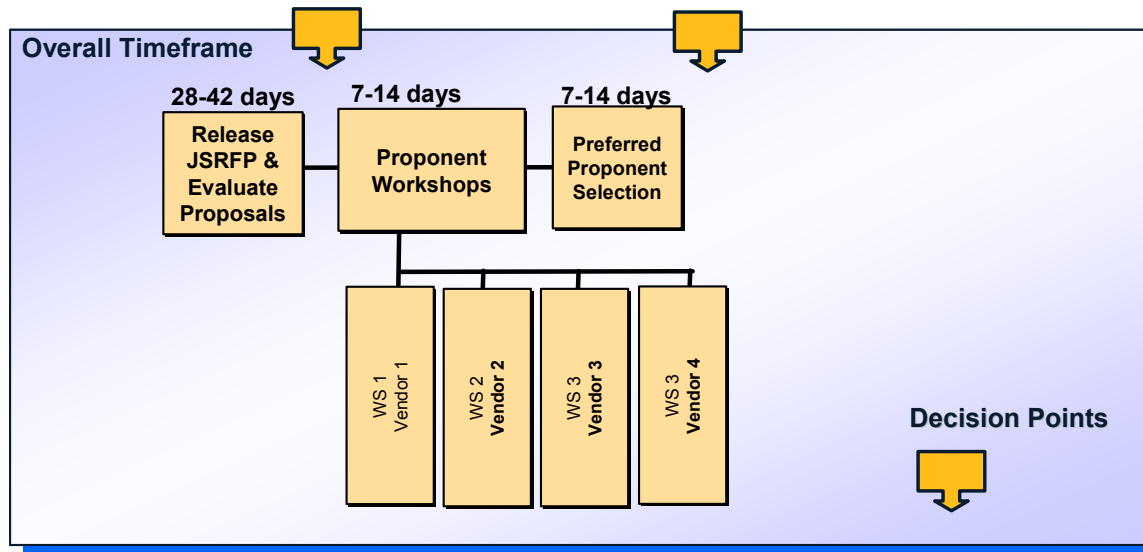
The Ministry will establish a list of staff capable of providing information during the Contract Negotiation Phase of the JSP process. This may include access to Project staff, subject matter experts and senior executives of the Ministry as well as the Deputy Minister. The Ministry may retain the services of an independent party to act as a negotiating lead working with senior executives during this Phase.

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4 THE JSP PROCESS AND EVALUATION CRITERIA

4.1 THE JSRFP PROCESS

4.1.1 Approach and Timeline Overview



The JSP process is designed to take a prospective JSP project through an initial series of pre-JSRFP exploratory sessions in order to determine a project's candidacy as a JSP project, through to a series of phases that culminates in some form of Business Alliance between a Successful Proponent as Partner and the Ministry. Examples of deal structures for the Business Alliance are outlined in section 2.4 of this document.

Identification of the Preferred Proponents is based on continuous assessment of a Proponent's 3C's to work with the Ministry in developing a Solution that meets the objectives of the Project. As a guideline, the Ministry will be looking for a logical trend or progression in the Proponent's demonstrated skills as the Proponent moves from Stage 1 (being the evaluation of Proposals), gains more knowledge of the Ministry business environment and needs during Stage 2 (the Workshop Stage) and finally delivers a more focused but still conceptual solution (Concept) during Stage 3 (the Concept Stage) of the Proponent Qualification Phase. The Concept provided by the Preferred Proponents will be validated early in the Joint Solution Definition Phase of the JSP process. The Proponents should understand that the Concepts may be subject to significant change as the Joint Solution Definition Phase progresses. A Proponent's Proposal in response to this JSRFP is the initial step in qualifying to participate in the Joint Solution Definition Phase. Preferred Proponents will be selected on overall performance in a number of areas encompassing the 3C's and not exclusively on the Concept. Proponents should keep in mind that the Ministry is not only looking for information on how to do the Project, but also on proof that the Proponent has successfully performed, managed and operated a similar sort of business as Workplace Support Services.

4.1.2 Release JSRFP and Evaluate Proposals

Upon completion of the evaluation of the Proposals, a short-list of up to four Proponents will be created and those Proponents will be invited to participate in Stage 2 (the Workshop Stage). The remaining Proponents will be advised of their standing in writing and offered debriefing sessions.

4.1.3 If Only Two Proponents

In the event that only two Proponents are deemed to qualify as a result of the evaluation of the Proposals in Stage 1, then the Ministry reserves the right to consider these Proponents as Preferred Proponents and to proceed directly to the Joint Solution Definition Phase. In this case some aspects of the Workshops may be performed during the early part of the Joint Solution Definition Phase in order to set the stage for Solution development. The Ministry also reserves the right to invite the two Preferred Proponents to present either their High Level Approach or their 3C's to the Ministry to ensure that they have the necessary 3C's required to undertake the Project and deliver the final Solution. These presentations may take place either prior to the commencement of the Solution definition activities, or at any other time during the Joint Solution Definition Phase.

4.1.4 Workshops

The purpose of the Workshops is to allow short-listed Proponents the ability to further explore the Project and to provide an avenue for them to assess whether the Project is of sufficient interest to engage in a significant amount of work at the Joint Solution Definition Phase and, if the Proponent is the Successful Proponent, at the Due Diligence & Negotiation Phase and the Contract Negotiation Phase. The guidelines that will govern the Workshops are outlined below. The Ministry reserves the right to alter these guidelines (and any scheduling) as needed, but will only do so after notifying the short-listed Proponents.

- a) The Ministry will allow a full working day (in two half-day segments) for each of the short-listed Proponents. The first half-day will begin with an information session delivered by the Ministry to the short-listed Proponents. This information session will be unidirectional in order to ensure that all short-listed Proponents are given the same information. The Project team will be available for questions for the immediate hour following the session. The second half-day session will be reserved for a short-listed Proponent's staff to question the Project team so as to further explore the material presented in the morning session or to ask questions that the short-listed Proponent feels are needed in order for it to deliver a Concept at Stage 3 of the selection process. The second half-day session may take place on the same day or be scheduled in the morning of the following day so as to give short-listed Proponents time to assimilate the first session's information and to prepare questions for the second session. Please note that there will be no allowance for a follow-up Workshop.
- b) The second session is for the benefit of the short-listed Proponents, and accordingly, wide latitude will be afforded to the question period. Short-listed Proponents may manage the meeting in the manner that they deem most useful.

- c) While the Ministry will make every effort to ensure that pertinent people are available to answer queries, there may be some questions that cannot be answered during the second session. In this case every effort will be made to communicate the response to the short-listed Proponent within one working day of the Workshop. The Ministry will, however, not be liable whatsoever for any delays in providing a response to any unanswered questions within that period.
- d) The Workshops will not be electronically recorded and all questions asked by a short-listed Proponent will be considered proprietary and not released to other short-listed Proponents. In addition, answers to questions asked during the Workshops which could not be answered by the Project team will be communicated in writing to the respective short-listed Proponent only. All questions asked prior to or after the Workshops should be submitted in writing to the contact person indicated on the front of this document. Responses to these questions may be communicated to all short-listed Proponents. The Ministry reserves the right, however, to disseminate information related to the Province or the Project arising as a result of questioning in any one of the Workshops, to all short-listed Proponents if, in the opinion of the Ministry, the information is related to a matter that all Proponents will need to know in order to prepare for the Concept presentations.
- e) The Ministry will not require short-listed Proponents to bring specific staff to the Workshops. Each short-listed Proponent should decide who from their organization is best suited to gather the necessary information.

4.1.5 Proponent Presentations

On completion of the Workshops, short-listed Proponents will be given a period of time to assess the information they have gathered during their Workshops and formulate a Concept for presentation to the evaluation committee in Stage 3. Section 4.7.2 describes the evaluation criteria that will be used at Stage 3. While the major portion of the presentation should focus on the short-listed Proponent's Concept (which should include some possible deal structures and high level solution approaches), the short-listed Proponent's overall ability to function in a Business Alliance will also be considered. A transcription or minutes may be taken of the Stage 3 proceedings (which will remain the property of the Province). Presentations will be limited to 3 hours of which some time will be reserved for the evaluation committee to ask questions on any aspect of the short-listed Proponent's Concept or performance during the various stages of the Proponent Qualification Stage. The time may also be used to pose situational questions designed to assess the 3C's of the short-listed Proponent. Please note that the evaluation committee reserves some latitude when asking questions during Stage 3 on the condition that the questions will be based on information provided during the selection process. Each short-listed Proponent is required to supplement its presentation with a paper and electronic copy version of its Concept presentation.

4.1.6 Preferred Proponents Selection

On completion of the evaluation process, the Ministry will tabulate the evaluation results and rank the short-listed Proponents. The top two ranked short-listed Proponents will be deemed Preferred Proponents and will be invited to engage in the Joint Solution Definition Phase.

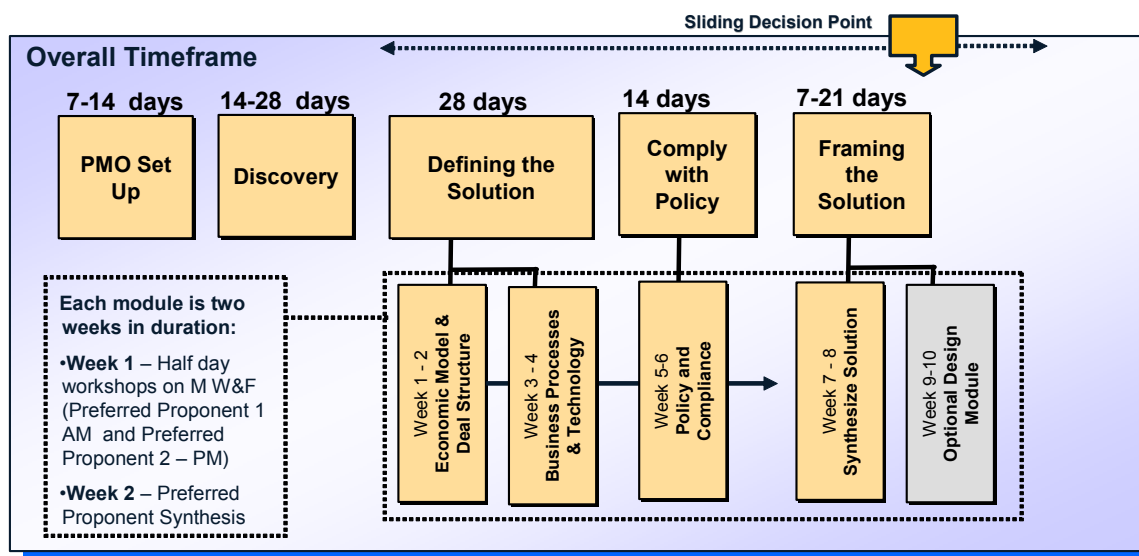
4.1.7 Post Presentations and Debriefings

Once the top two Preferred Proponents have been declared, a Joint Solution Definition Agreement will have to be executed by the Ministry and each of the two Preferred Proponents prior to commencing the Joint Solution Definition Phase activities. In the event Joint Solution Definition Phase activities or negotiations with one of the Preferred Proponents fail, the Ministry reserves the right to contact the next highest ranked short-listed Proponent and invite them to engage in Joint Solution Definition Phase activities with the Ministry. Proponents who are not invited to the Joint Solution Definition Phase may request a debriefing session, which will be scheduled by the Province after the conclusion of the Contract Negotiation Phase.

4.2 JOINT SOLUTION DEFINITION PHASE

The Joint Solution Definition Phase of the JSP will require significant investment on the part of the Ministry as well as the Preferred Proponents. The Joint Solution Definition Agreement that is signed by the Province with each of the Preferred Proponents will govern the conduct of the remaining Phases of the JSP.

Preferred Proponents are cautioned not to delay in finalizing the Joint Solution Definition Agreement as once one Preferred Proponent has satisfactorily executed the Joint Solution Definition Agreement the discovery cycle of the Joint Solution Definition Phase described in section 4.2.2 may begin immediately with that Preferred Proponent.



The core objective of the Joint Solution Definition Phase is to work with both Preferred Proponents to define solutions, economic models and deal structures for the Project. These activities (and series of meetings) will be performed jointly with the Ministry teams (see section 4.2.3) but independently with each Preferred Proponent.

The primary deliverable coming out of the Joint Solution Definition Phase will be a Solution that describes:

- The deal structure;
- A model for alternative services delivery of Workplace Support Services; and
- A statement of validation that the Solution framework is compliant with policy and other government regulations and agreements.

This Solution will form the basis for the Letter of Intent to be entered into in connection with the Due Diligence & Negotiation Phase.

There are five (5) key tasks, as follows, that describe how the Joint Solution Definition Phase will proceed.

4.2.1 Information Control Office

The Ministry plans to establish an information control office that will serve as a central repository of information used to facilitate the exchange of confidential information between the Preferred Proponents and the Ministry. The function of this office is to ensure that confidential information provided by the Preferred Proponents is kept segregated and that Joint Solution Definition Phase activities are facilitated. Details of this office will be provided to the Preferred Proponents as the JSP process progresses.

4.2.2 Discovery Cycle

The discovery cycle is a one-time period of activity when Preferred Proponents are permitted access to Ministry staff, documents, technology assets and records and service metrics (where applicable), as well as any information that a Preferred Proponent may feel is necessary in order to prepare for the process of creative Solution definition. Please note that the Ministry does not guide this period.

4.2.3 Defining the Solution

This period of activity consists of a series of iterative one-week Solution definition cycles designed to define the business and technical scope of the Project, as well as the potential timing to benefit realization, the nature of the deal structure (e.g. joint venture, outsource, etc.) and economic model. The Preferred Proponents will be working independently from each other, with the Ministry's Project team, in jointly formulating a Solution to the Project objectives.

While the Concept provided at the Preferred Proponent's presentation will be used as a basis for the Solution, it is possible that information gathered during the discovery cycle, or as a result of discussions with the Ministry during this cycle, may result with an entirely different approach being considered. It is also likely that the Solutions developed by the Preferred Proponents may be very different.

The iterative series of meetings is envisioned to rotate with one week of data gathering workshops (e.g., 3 days a week with one Preferred Proponent allocated morning workshops and the other Proponent allocated afternoon workshops) with the subsequent week for synthesizing the models. The activities will focus on a proposed economic model for the Solution as well as Ministry business processes and technology. The Ministry expects that the Solutions will be creative.

The Ministry will ensure that its decision makers are at the table so that decisions are expedited and the Solution Definition Phase of the JSP process successfully concluded.

4.2.4 Comply with Public Sector Service Standards

Once the economic model and business processes/ technology aspects of the final Solution are formulated, the Preferred Proponents and the Ministry will need to assess the Solution framework for compliance with public-sector service delivery standards. This process will include a series of iterative cycles where the Solution parameters are measured against functions such as: labour relations, conformance with privacy laws, government direction and statutes, and existing agreements.

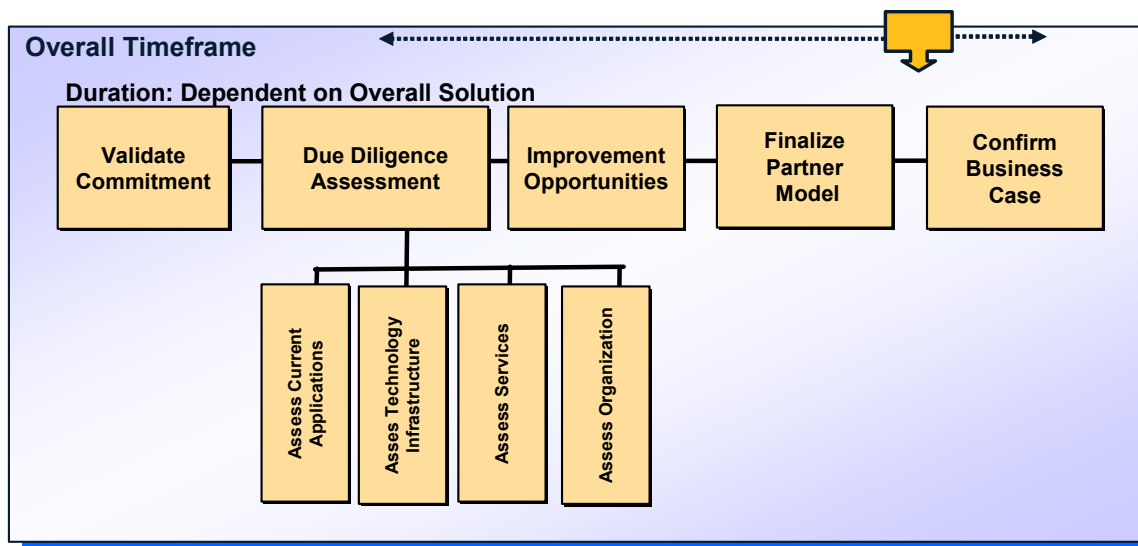
4.2.5 Framing the Solution

At this point in the Joint Solution Definition Phase, the Preferred Proponents will have formulated a Solution approach that incorporates work on a proposed deal structure, associated economic model, and Solution parameters addressing the scope of business (business processes and technology) and will have been tested against government policy and standards.

A period of Solution synthesis will take place on the overall model after which the Ministry will perform a final evaluation to determine the Successful Proponent. The final evaluation will be based on the Preferred Proponent's Solution in the areas of: (a) deal structure, (b) economic model and assumptions; and (c) solution business processes and technology.

Once a Successful Proponent has been announced, the remaining Preferred Proponent will be designated as the 'vendor-in-waiting'. In the event negotiations with the Successful Proponent fail, or do not adequately progress, the Ministry reserves the right to contact the remaining Preferred Proponent and invite it to enter into the Due Diligence & Negotiation Phase.

4.3 DUE DILIGENCE & NEGOTIATION PHASE



The Due Diligence & Negotiation Phase will begin with a period of due diligence where both the Successful Proponent and the Ministry will engage in activities to ensure that the Solution developed during the previous Joint Solution Definition Phase is validated against detailed information.

There are five (5) key tasks that describe how the Due Diligence & Negotiation Phase will proceed.

4.3.1 Validate Commitment

An early activity in this phase is validation of the prospective Business Alliance structure and of the Solution framework presented by the Successful Proponent entering into this phase. The Ministry expects that a Letter of Intent will be signed by the parties and announced to the public. The Letter of Intent will make reference to the Successful Proponent's Solution framework as the approach of choice. A series of project management activities will take place to set the stage for detailed due diligence and negotiations. This includes establishment of both the Ministry and Successful Proponent's negotiating and supporting infrastructure (tools and resources), meeting schedules, subject areas and rules of engagement as applicable. An oversight process will be discussed and participation of decision makers for the duration of the phase, in Victoria, British Columbia, agreed to prior to commencing with the due diligence process.

4.3.2 Due Diligence Assessment

This period of activity is primarily for the Successful Proponent to detail its understanding of the parameters impacting successful delivery of the Solution formulated in the previous Joint Solution Definition Phase. This includes detailed verification of information used to design the Solution, assumptions reviewed and accepted or referred to negotiations, business processes and human resources data detailed and base-line service and financial levels assessed and verified against the Solution model and inventory of technology completed. The Ministry may, in addition, perform further due

diligence on the Successful Proponent to verify its current financial and operating capacity to deliver on and/or commit to the statements made in the Solution framework.

4.3.3 Improvement Opportunities

As a result of the due diligence process it is expected that opportunities to increase services and decrease costs of delivery will be discussed, negotiated and agreed upon to the maximum extent possible. An approach to establishing subsequent opportunities and the costs/benefits involved will also be defined.

4.3.4 Finalize Partner Model

An important activity of this phase is finalization of the proposed Partner model that will be used as a basis for the Final Contract. A number of joint discussions will need to take place including detailed understanding on the governance structure, strategic and tactical plans and guiding principles that describe how the Partner model will operate. This activity has to be completed prior to commencing the Contract Negotiation Phase of the JSP process.

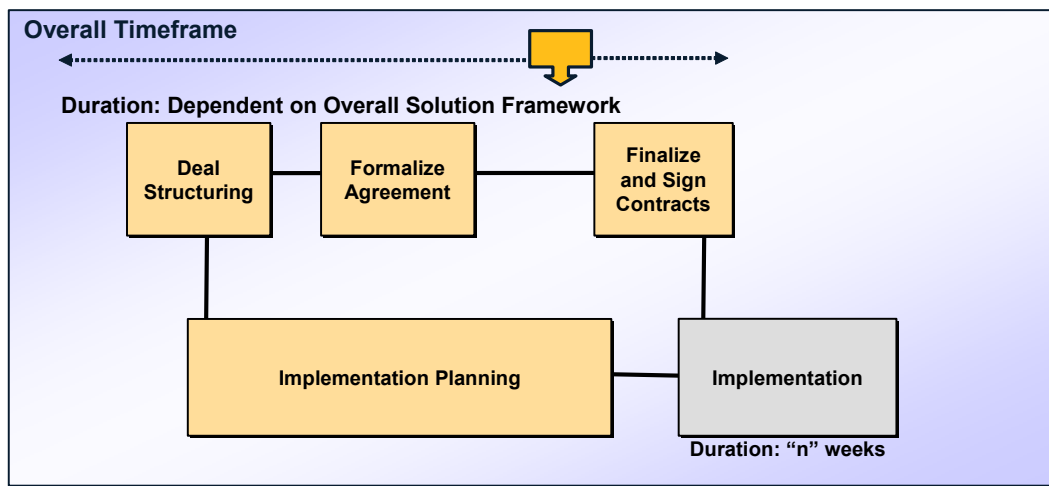
4.3.5 Confirm Business Case

On conclusion of the due diligence work, the business case coming out of the previous Joint Solution Definition Phase will be refined, the deal structure model completed and prepared for incorporation into the Final Contract.

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4.4 CONTRACT NEGOTIATIONS PHASE

The Contract Negotiation Phase marks the final section of the JSP process. Activities include negotiations on the deal structure, governance and operational plans necessary to operate the Solution as well as developing the Final Contract so as to establish a long-term Business Alliance with the Partner. The negotiations will also include discussion on opportunities and mechanisms for mutual re-negotiation of the Final Contract, so as to respond to changes in the parties' respective business environment, as the Business Alliance evolves over the term of the Final Contract.



There are four (4) key tasks that describe how the Contract Negotiations Phase will proceed.

4.4.1 Deal Structuring

A period of deal structuring will take place once the business case has been finalized and agreed upon. The final term sheet will be produced, contract structure determined and final decision to proceed with the Final Contract will be made.

4.4.2 Implementation Planning

In preparation for implementation of the Project, the short term plan will be completed to:

- Establish priorities;
- Identify quick wins; and
- Establish communication requirements.

4.4.3 Formalize Agreement

During this period of activity the Final Contract will be negotiated and schedules prepared.

4.4.4 Finalize and Sign Contract

Once the Final Contract is ready for execution, both the Ministry and Partner will need to obtain the necessary approvals to sign the Final Contract. On signing, a public announcement may be made and implementation of the services will begin. Any public announcement by the Partner is to be approved by the Ministry before release.

4.5 DECISION POINTS

The Ministry reserves the right to apply a decision point at any time from the Joint Solution Definition Phase through to the end of the JSP process and either suspend, terminate or re-start discussions or negotiations with any of the Preferred Proponents. Any determination to invoke a decision point will reside with the Ministry.

At various stages in the JSP process, the Ministry may request that the Preferred Proponents prepare a presentation for the Ministry's executive so as to assess the progress of the activities to date. These presentations will be used to assess the state of the respective discussions and to determine whether the JSP approach continues to be appropriate.

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4.6 EVALUATION CRITERIA

4.6.1 Proposal Format Guidelines

Proponents are asked to assist the evaluation committee by structuring their Proposals in a consistent manner. The Proposal format should be as described below:

- JSRFP Cover Page;
- Signed letter substantially similar to Appendix A;
- Table of Contents;
- Executive Summary;
- Checklist of Mandatory Criteria (see section 4.6.2.1);
- Body of the Proposal (see sections 4.6.2.2 and 4.7);
- References; and
- Appendices (if required).

4.6.2 JSRFP (Phase1) Evaluation Criteria

4.6.2.1 Mandatory Criteria

All Proposals that have satisfied the mandatory criteria below will be further evaluated according to the criteria listed in section 4.6.2.2. Failure to satisfy any one or more of the mandatory criteria will result in disqualification from the JSP process.

Mandatory Criteria	
1	The Proposal must be received at the closing location before the specified closing time or it will not be accepted.
2	The Proposal must be in English and must not be sent by mail, facsimile or e-mail.
3	The Proposal must include a covering letter substantially similar to the Sample Letter in Appendix A, signed by a representative of the Proponent who is duly authorized to bind the Proponent.
4	Proposals must include a statement that the Proponent is not in receivership or insolvent.
5	Proposals must include a statement that the Proponent has prior experience in delivering and managing Workplace Support Services for a minimum of 4,000 Workstations for a single client.

4.6.2.2 Stage 1 Evaluation Criteria

Proposals will be evaluated based on the evaluation criteria listed in the table on the following page.

Stage 1 will be used to qualify Proponents to proceed to Stage 2 and then Stage 3 of the Proponent Qualification Phase. Scores achieved in Stage 1 will not be carried to Stage 2 and Stage 3. However, information provided in Proposals may be referenced throughout the JSP process.

The evaluation committee will consider the 3C's of the Proposal as follows:

CAPABILITY: Includes experience of a similar nature to this Project, including size, complexity, geographic dispersion and public sector orientation.

CAPACITY: Includes depth and breadth of resources (human, technical and financial) to undertake this Project, and successfully deliver against the Project objectives (see section 2.1).

COMMITMENT: Includes demonstrated commercial and managerial commitment to engage in this JSP process and to enter into a Final Contract with the Province.

If a Proponent intends to either submit a joint Proposal with one or more Subcontractors, or intends to use the services of Subcontractors in the Final Contract, then the response to specific evaluation criteria should include information regarding either the Proponent or the Subcontractors, but not both (unless specifically requested otherwise in the evaluation criteria).

The Proponent should present the best credentials (as selected by the Proponent) from among the Proponent and any proposed Subcontractors. Where information is required from the Proponent only, this is indicated as "Proponent" and where either the Proponent or a Subcontractor can provide the best response, this is indicated as "Either". Where the information is requested for "All" this means both the Proponent and any named Subcontractors referenced in the Proposal.

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Evaluation Criteria	Minimum Score	Stage 1 Weighting
<p>1. Capability – Proponent and Subcontractors</p> <p>a) Company profile (All);</p> <p>b) Demonstrated experience working with public sector clients, legislation, policies, and regulations (Either);</p> <p>c) Demonstrated experience managing employee transitions (preferably union) (Either);</p> <p>d) Demonstrated experience delivering Workplace Support Services of similar magnitude, complexity and geographic dispersion as described in this JSRFP (Either); and</p> <p>e) Demonstrated experience ensuring confidentiality and security in the management of government information (Either).</p>	60%	20%
<p>2. Capability – <i>Formulating a Solution</i></p> <p>a) Demonstrated experience in innovative deal structuring (Either); and</p> <p>b) Demonstrated experience in designing and implementing innovative economic models (Either).</p>	N/A	10%
<p>3. Capability – <i>High-level Approach</i> (Proponent only)</p> <p>a) Describe a high-level approach to address the objectives of the Project and specifically (Proponent):</p> <ul style="list-style-type: none"> • Reducing Seat Costs; • Increasing standardization and service levels; • Achieving continuous service improvement; • Maintaining a productive contractual relationship; and • Enabling a rapid transition to the new business arrangement. <p>b) Describe a high-level approach to address the issues and challenges of the Project (Proponent).</p>	N/A	30%
<p>4. Capacity</p> <p>a) Corporate and financial capacity (Either);</p> <p>b) Details of the key resources dedicated to (Proponent):</p> <ul style="list-style-type: none"> • Engage in this JSP process; • Manage the ongoing business relationship with the Province and any Subcontractors. <p>c) Demonstrated capacity and ability to manage investment risk (Either); and</p> <p>d) Demonstrated capacity to engage in long-term (5 to 10 years) contracts (All).</p>	60%	25%
<p>5. Commitment (Proponent only)</p> <p>a) Commitment of Proponent’s staff to ensure the continuity of the Proponent’s team in the JSP process and potentially the Final Contract. (Proponent);</p> <p>b) Commitment of Proponent to manage relationship with the Province and commercial arrangements with Subcontractors, if any. (Proponent); and</p> <p>c) Commitment of Proponent to achieving the objectives of the Project in a timely manner. (Proponent).</p>	60%	15%

On completion of the Stage 1 evaluation process, the scores will be tallied and Proponents ranked. Up to the four (4) top ranked Proponents will be invited to participate in the Stage 2 Workshops. The unsuccessful Proponents will be advised of their ranking and offered debriefing sessions. Section 4.7 provides response guidelines for Stage 1 of the Proponent Qualification Phase.

4.6.2.3 Stage 2

All short-listed Proponents will be invited to participate in individual Stage 2 Workshops with the Ministry. The Workshops provide an opportunity for the short-listed Proponents to explore the Project and to apply their knowledge of Workplace Support Services management and alternative services delivery in producing a Concept for delivery at the Stage 3 presentations.

This stage will not be evaluated.

4.6.2.4 Stage 3 Evaluation Criteria

On completion of Stage 2 of the Proponent Qualification Phase, short-listed Proponents will be asked to further develop their Solution Concept for presentation to the Evaluation Committee. Section 4.1.5 describes the format of the presentations.

The solution approach accounts for 100% of the total evaluation score of the JSRFP.

The Province will finalize the evaluation criteria for Stage 3 prior to opening of the Proposals and will distribute the finalized evaluation criteria to the short-listed Proponents. The high level elements that will be assessed at this stage include:

- Deal structure;
- Business process;
- Technology;
- Economic model; and
- Performance measures and evaluation.

The approach to be delivered at the presentations should address the 3C criteria described above. Proponents are required to provide a written (and electronic) version of the approach (slides) presented to the evaluation committee. The Ministry acknowledges that the final Solution may be substantially different from the Concept following the Joint Solution Definition Phase.

On completion of the Stage 3 evaluation process, the scores will be tallied, and the short-listed Proponents will be ranked. The top two short-listed Proponents will be deemed the Preferred Proponents and invited to the Joint Solution Definition Phase of the JSP process.

4.6.2.5 Joint Solution Definition Phase Decision Criteria

Once the Preferred Proponents have been identified, a period of Joint Solution Definition activities will take place that culminates with both Proponents each completing a Solution and business case that describes their proposed commercial arrangement. The Ministry's executive (sponsor team) who was engaged with the Preferred Proponents during the iterative cycles of the Joint Solution Definition Phase will convene and determine which Preferred Proponent will be deemed the Successful Proponent and thereby invited to sign a Letter of Intent with the Ministry.

As described in section 4.2.5, the Ministry will request that the Preferred Proponents present their Solution to the evaluation committee where they will be assessed against the Project objectives.

The decision criteria and governing process will be communicated to the Preferred Proponents upon the signing of the Joint Solution Definition Agreement. On completion of the evaluation, the Ministry will announce the Successful Proponent and the Due Diligence & Negotiation Phase will commence as described in section 4.3.

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4.7 PROPONENT RESPONSE GUIDELINES

Proponents should provide as much detail as necessary (in accordance with the instructions set forth in 4.6.2.2) in order to demonstrate actual expertise and experience in the pertinent criteria. This includes providing real examples with contact references that can validate a Proponent's information as part of the reference checks.

4.7.1 References

Proponents should provide references, where requested in section 4.7.2 that support the information provided in the written Proposal. Note - the same reference may be used for more than one sub-section of section 4.7.2. The Province, in its sole discretion, may conduct further reference checks by contacting other corporate and project references in addition to the ones provided by the Proponents.

4.7.2 Evaluation Criteria

4.7.2.1 Capability – Proponent & Subcontractors

- a) Company Profile: Provide a company profile of the Proponent (and Subcontractors if applicable) detailing background information, including the year established; parent company, if applicable; corporate strategic direction; area of recognized expertise in the marketplace; an overview of the company(s) corporate structure, including information of size, revenues, market and geographic coverage.
- b) Demonstrated experience working with public sector clients, policies and regulations: Provide three examples with references of long term (three years and greater) working relationships with public sector clients. Describe the responsibility of the Proponent (or Subcontractor, as applicable) throughout these working relationships.
- c) Demonstrated experience managing employee transitions (preferably union): Provide three examples with references of the experience managing an employee transition project. Describe: the high level approach taken to transition employees, challenges faced, including number and type of Proponent (or Subcontractor, as applicable) resources, the number of employees transitioned, union status of transitioned employees, geographic implications, services provided to employees and retention metrics after two years. Also describe the critical success factors associated with their project examples and explain how their approach resulted with a mutually beneficial result for both organizations.
- d) Demonstrated successful experience delivering services of similar magnitude, complexity and geographic dispersion as this Project. Provide three examples with references of services similar to Workplace Support Services being delivered by the Proponent (or Subcontractor, as applicable). The examples should include: type and complexity of business where services are being delivered, geographical coverage for services, length of time delivering these services, high level metrics

(e.g. number of Workstation units supported, complexity of applications supported, and client satisfaction ratings).

- e) Demonstrated experience ensuring confidentiality and security in the management of government information. Proponents should provide two examples with references, demonstrating experience of the Proponent (or Subcontractor, as applicable) working with and providing confidentiality and security over sensitive and confidential information on behalf of their client. Also describe the prevailing law, policy or contractual obligations in relation to the information and what practices including quality assurance they had in place to provide protection and compliance.

4.7.2.2 Capability – Formulating a Solution (Proponent or Subcontractors)

- a) Demonstrated experience in innovative deal structuring. Provide two examples with references where the implemented Solution was innovative for the client. Describe why the deal would be considered innovative and the benefits derived by the client.
- b) Demonstrated experience in designing and implementing innovative economic models. Provide two examples with references where the implemented Solution was economically innovative for the client. Describe why the deal would be considered an innovative economic model and the benefits derived by the client.

4.7.2.3 Capability – High-level Approach

- a) Proponents should explain their vision for the Project and describe at a high-level the approach to meeting the objectives of the Project. This description should include (but should not be limited to) organizational structure, location of service delivery staff, approach to cost reduction, technology and standardization, service level improvements, liaison with government and the value of the approach to Province.
- b) Proponents should demonstrate their understanding of the issues and challenges facing the Project and how they plan to address the issues and challenges to deliver on the Project objectives.

4.7.2.4 Capacity

- a) Corporate and financial capacity. Describe the Proponent's (or Subcontractor's, as applicable) corporate capacity including: number and type of employees providing services similar to the Workplace Support Services and financial capacity of the Proponent (or Subcontractor, as applicable).
- b) Proponents should provide summaries of relevant experience for the Proponent's key resources who will be dedicated to the JSP process, and ongoing management of the business relationship with the Province and any Subcontractors during the Final Contract.
- c) Demonstrated capacity and ability to manage investment risk. Describe two current examples with references of the Proponent having the capacity and ability to manage investment risk in a similar project.

- d) Demonstrated capacity to engage in long-term contracts. Describe the capacity within the Proponent's and any Subcontractor's organizations to manage a long-term (five to ten years) commercial arrangement similar to this Project. Capacity should include (but not limited to): proposed team structure and relevant experience.

4.7.2.5 Commitment

- a) Commitment of Proponent's staff to ensure the continuity of the Proponent's team in the JSP process. Describe the proportion of time allocated by the Proponent's dedicated key team members to each Phase of this JSP process.
- b) Commitment of Proponent to manage the relationship with the Province and commercial arrangements with Subcontractors, if any. Proponents should provide two examples with references, where this sort of commercial relationship has been successfully implemented and should describe any problems that needed to be addressed in order to maintain the relationship.
- c) Commitment of Proponent to achieving the objectives of the Project in a timely manner.

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APPENDICES

5 APPENDIX A – SAMPLE LETTER

Letterhead or Proponent's name and address

Date

Ministry of Management Services

Dear Sir/Madam

Subject: Joint Solution Procurement Request for Workplace Support Services
JSRFP SATP-042

List any amendment numbers and dates

The enclosed proposal is submitted in response to the above-referenced JSRFP. Through submission of this proposal we agree to be bound by all of the terms and conditions of the JSRFP.

We have carefully read and examined the JSRFP and have conducted such other investigations as were prudent and reasonable in preparing the proposal. We agree that subject to the terms and conditions of the JSRFP we shall also be bound by statements and representations made in this proposal.

Yours truly

Signature

Name: _____

Title: _____

Legal name of Proponent: _____

6 APPENDIX B - RECEIPT CONFIRMATION FORM

**Workplace Support Services Project
Closing Date: January 26, 2004
Joint Solution Request for Proposal No. SATP-042
Ministry of Management Services**

To receive any further information about this JSRFP please return this form to:

Attention: Patrick Ngo
Mail: Fax #: (250) 387-1399
Or: P.O. Box 9451 Stn Prov Govt, Victoria, B.C. V8W 9V7
Email: Patrick.Ngo@gems7.gov.bc.ca

Company: _____

Street address: _____

City/Province: _____ **Postal Code:** _____

Mailing address if different: _____

Phone number: _____ **Fax number:** _____

Contact person: _____

E-mail: _____

We will be sending _____ representatives to the Proponents Meeting.
(number)

Representative 1: _____

Representative 2: _____

Others: _____

We will not be attending but will probably be submitting a proposal.

Unless it can be sent by fax or email, the Proponent should arrange for courier pickup of further correspondence about this JSRFP upon email notice by the Project's designated contact.

Signature: _____

Title: _____

7 APPENDIX C – JOINT SOLUTION DEFINITION AGREEMENT

The Preferred Proponents must enter into a Joint Solution Definition Agreement with the Province that will govern the actions of the Province and the Preferred Proponents during the Joint Solution Definition Phase, the Due Diligence & Negotiation Phase and the Contract Negotiation Phase. The Joint Solution Definition Agreement will include, but not be limited to, the provisions summarized below:

1. General representations, warranties and covenants;
2. Conflict of interest provisions including representations and warranties in respect of conflicts and a requirement to implement a conflicts plan;
3. Evaluation process including formation of the evaluation committee; certain evaluation criteria used to evaluate the Preferred Proponents; and the debriefing process;
4. The right of the Province to amend, modify or suspend the JSP process or suspend or cancel negotiations with a Preferred Proponent;
5. Right of the Province to designate an alternate Preferred Proponent;
6. Obligation of Preferred Proponents to bear all of their own expenses;
7. Restriction on lobbying and on any contact with Ministry or government personnel except as authorized by the Province;
8. Due diligence covenants including certain rights of the Preferred Proponent to seek information from the Province and the right of the Province to consult outside references and obtain third party information regarding the Preferred Proponent;
9. The Province being under no obligation to enter into a Final Contract;
10. No obligation for the Final Contract to be based upon the JSRFP and the ability of the Province and the Preferred Proponent to enter into arrangements that exceed or only include part of the scope contemplated by the JSRFP;
11. Duty of the Preferred Proponent to act in good faith throughout the JSP process;
12. Data room management provisions;
13. Confidentiality provisions including (a) the Province agreeing to keep detailed solutions of the Preferred Proponent confidential subject to reasonable exceptions in order to facilitate the JSP process and subject to the Freedom of Information and Protection of Privacy Act; and (b) the parties agreeing on processes for information to be released in certain circumstances to other stakeholders;
15. Privacy provisions;
16. Intellectual property provisions including ownership rights, representations, warranties, indemnities and cross licensing provisions;
17. The term of the JSP process, default provisions, termination rights and consequences of termination or breach;
18. A summary of certain terms that would be required to be included in the Final Contract;
19. No representations or warranties from the Province; no liability of the Province for indirect or similar types of damages; and a limit of liability of the Province equal to the reasonable direct expenses incurred by the Preferred Proponent;
20. No liability for errors or inaccuracies of the Province;

21. No assignment right for the Preferred Proponent;
22. Manner in which consortiums and their members are obligated to the Province; and
23. General provisions including notice, governing law, entire agreement, nature of relationship, survival and execution.

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8 APPENDIX D – CURRENT STATE DESCRIPTION – WORKPLACE SUPPORT

8.1 INTRODUCTION

The following section describes the service items delivered under CITS current Workplace Support Services and covers the following:

- Service management escalation;
- Onsite service management;
- Helpdesk;
- Onsite service support;
- IMAC coordination;
- IMAC execution;
- Order management;
- Local area network administration at the Workstation for local, physical connectivity support;
- Base technology engineering services;
- Self-help and knowledge base;
- Asset Inventory Management;
- Software asset tracking;
- Deployment services (including stock management and image management); and
- Security relating to Workplace Support Services ID administration and internet access.

8.2 SERVICE MANAGEMENT ESCALATION

CITS uses industry standard definitions for service management escalation using the level 1-3 language that is explained below:

Level 1: **Helpdesk** - the Level 1 service provides fundamental call management and incident direction and tracking services.

Level 2: **Technology Engineering Services** (“TES”) - the Level 2 service provides support services beyond the Level 1 helpdesk’s mission or capabilities. For example, Level 2 handles problems requiring greater depth of knowledge, more technical issues or longer time on the phone. Level 2 is involved in end-user training, systems and operations, Workplace Support Services, project services, knowledge management, application support, Software Distribution, change management, documentation management, portfolio/asset tracking, workgroup computing and directory services.

Level 3: **Manufacturer** – the Level 3 service is provided by the source code owner (manufacturer) who is responsible for the product’s maintenance and technical support services.

8.3 ONSITE SERVICES MANAGEMENT

Includes the following management functions:

- Administer the change order process and include regular reports on this process;
- Obtain and provide information, data, decisions and approvals;
- Determine approach and develop solutions with Workstation Services Branch for Client projects or new service requirements;
- Resolve any open in-scope issues brought forward and escalate with the appropriate organizations;
- Act as a senior project manager for significant projects; and
- Manage and resolve any financial/billing-related issues.

8.4 HELPDESK

The Level 1 helpdesk is the support hot line. It acts as the human single point of contact for all technology-related problems (mainframes to Workstations; internal applications to shrink-wrapped software; telecommunications and local area networks; hardware break/fix and more) and service requests. The Level 1 helpdesk should be able to resolve approximately 65% to 80% of all incoming support calls and e-mail-submitted problems. Remaining calls are passed to Level 2 and Level 3 support personnel. The helpdesk performs the following Level 1 helpdesk functions:

- Single point of contact for all Workplace Support Services and telephony users calls (5x11 coverage; 5 days/wk 11hrs/day 6am-7pm);
- Incident management (problem and call management for Workplace Support Services and telephony; with logging, categorizing and tracking problems through to resolution);
- Provide problem management information by identifying repetitive problems;
- Provide Level 1 support for Core Software and Supported Software (see Appendix F – Core Software and Appendix H – Supported Software);
- Provide Level 1 support for approved Client - Line of Business Software;
- Perform problem source identification;
- Invoke proper problem resolution resources;
- Dispatch service provider where applicable;
- Follow-up for resolution status and document actions taken (for problems dispatched to vendors only);
- Escalate to next level of support according to defined procedures;
- Prepare documentation of single point of contact standards and procedures;
- Provide front end status message during high severity problems and to explain options for any after hours requests;
- Automated measurement and reporting on single point of contact performance;
- Provide problem resolution tools/aids such as remote take over, challenge question password reset, etc.;
- Compile problem resolution database;
- Perform problem analysis, trending and reporting; and
- Provide input to the training organization and to Client management on skill deficiencies.

8.5 ONSITE SERVICE SUPPORT

Covers the following onsite functions:

- Problem source identification;
- Problem impact validation;
- Problem determination;
- Problem resolution;
- Consulting (for scope items included in the contract);
- Apply emergency software fixes where electronic software delivery is unsuccessful;
- Virus eradication;
- Desk side orientation (30 minutes or less);
- Any of the above activities as they relate to non-standard products;
- Support for approved customer specific application software;
- Dedicated executive support, including VIP support with enhanced service level agreements;
- Determine Workstation/peripheral suitability;
- Warranty management (order management activates the warranty); and
- Travel and lodging expenses incurred on Workplace Support Services are included in the Seat Cost.

8.6 IMAC Co-ORDINATION

Includes the following basic IMAC functions ('basic' as used in this section means a service request that involves less than 10 units, does not require project management, applies to standard products, and follows documented approval processes):

- Provide a single point of contact for all IMAC requests;
- Plan and coordinate the execution of IMAC requests for end user Workstations, Peripherals and print queues;
- Coordinate site preparation including confirmation of the availability of physical cabling, facilities, and connectivity prior to IMAC performance to ensure business continuity;
- Schedule and coordinate IMAC with end user, technical support and IMAC execution team;
- Log and track all IMAC activity from receipt of request through to completion;
- Coordinate the set up of end user ID's that are required to complete the IMAC;
- Provide notification to end user and other designated personnel of each completed IMAC;
- Track and manage technical support compliance to service level agreements;
- Provides monthly reporting on IMAC activities; and
- Escalate requests according to defined procedures.

8.7 IMAC EXECUTION

Includes the following IMAC functions:

- Installation of system unit and/or sub components;
- Pre-delivery preparation (central, local and desk-side);

- Data move and conversion, as needed including user's specific information and settings (e.g. Internet Favorites);
- User orientation and confirmation, and installation quality assurance with end user to confirm installation and transfers are complete and operating successfully;
- De-installation and decommissioning of Equipment and software;
- Move to designated location including 'in transit' lock down for hard drive security;
- Data erasure of electronic media to current government standard and periodic auditing;
- Collect configuration data;
- Asset disposal according to current government policies and procedures;
- Periodic auditing of IMAC execution;
- Packing and transportation of insured cargo;
- Maintain small supply of hot swappable hardware to enhance service and customer satisfaction;
- Confirm asset tags are securely installed and assets are allocated correctly in the asset tracking database, and;
- Provide monthly reports to meet organizational requirements.

8.8 ORDER MANAGEMENT

- Provide product selection support over the phone to end users for pre order and technical assistance questions on standard product requests;
- Identify and coordinate availability of standard hardware and software products;
- Validate the product order for configuration accuracy and compliance with standards;
- Place order with respect to schedule, arrival, and deployment;
- Reconcile incomplete, defective or damaged shipments with supplier;
- Resolve issues with supplier community on customer's behalf;
- Provide support for order planning;
- Manage backorder/backlog;
- Confirm receipt of order and provide pre-install notification;
- Validate, update and report asset details;
- Reconcile vendor invoices, consolidate invoices;
- Forward the invoices to accounts payable (if applicable);
- Activate the warranty agreements (onsite service support handles warranty management);
- Provide asset data to Workstation Services Branch, as required;
- Create and update product catalogues;
- Handle secondary sourcing as necessary;
- Procurement – maintain up-to-date price and purchase agreement information, and include financing information, as applicable to standard hardware/software products;
- Procurement – create purchase orders and, manage their workflow to complete the purchase;
- Order tracking and notification (ETA's on orders, delays, etc.); and
- Provide monthly reports to meet organizational requirements.

8.9 LOCAL AREA NETWORK ADMINISTRATION AT THE WORKSTATION

Addresses local physical connectivity support as follows:

- Assist in maintaining network information records;
- Manage/submit telecommunications service request on behalf of the individual ministries;
- Work with second level support teams to resolve network related problems;
- Assist in maintaining detailed IP address and IP subnet information;
- Prepare network inventory and activity reports;
- Interface with CITS to arrange for IMACs to network circuits;
- Assist in maintaining the node name registry and/or information for network connections;
- Coordinate network activities, capacity assessments and upgrade plans, as appropriate;
- Work with Clients to resolve their firewall issues;
- Monitor network for intrusion detection and report any suspicious anomalies to CITS Virus Emergency Response Team; and
- Setup and manage router/firewall access control lists.

8.10 BASE TECHNOLOGY ENGINEERING SERVICES (TES)

Includes the following Level 2 functions:

- Develop and provide budget impact assessments with respect to changes to, or the operation of, technologies in the ministries;
- Develop and provide business impact assessments with respect to changes to, or the operation of, technologies in the ministries;
- Give technical presentations relevant to the services;
- Make recommendations with respect to service levels;
- Establish and maintain service processes, including integration with other service providers;
- Validate proposed standards, strategies and plans;
- Coordinate service requests that fall outside of regular IMAC processes;
- Initiate technical service projects in response to service requests;
- Analyze, assess and recommend technologies – both hardware and software;
- Respond to service requests by developing technical solutions which are documented as part of a proposed project charter;
- Attend meetings necessary for the management, coordination, and delivery of services;
- Provide ad-hoc consulting services with respect to the standard technologies in use by Clients;
- Provide management of TES resource pool;
- Follow documented change management processes;
- Evaluate each Clients' information technology environment on an on-going basis and provide an assessment of the impact of any proposed changes;
- Provide planning of transition between technologies;
- Participate in implementation of technology transition plans;
- Research marketplace and recommend standards where no government standard exists;
- Manage and maintain a test lab;
- Provide coordination of technology strategies within CITS and other areas of the Province;
- Provide coordination of operational activities within CITS and other areas of the Province;

- Analyze and apply research, market knowledge, professional knowledge and other information to assist the Province to attain improvements in service quality and value for money with respect to its technology expenditures;
- Develop and document changes and improvements with respect to the Province's technology engineering strategic plan;
- Provide active involvement in technology engineering strategic planning processes and other strategic IT initiatives;
- Participate in the implementation of strategic information technology initiatives;
- Create, maintain, and document standard Workstation images and scripts;
- Establish, document, and publish operating system group policies with respect to standard software permitted and supported in the government environment;
- Evaluate software image management techniques and make recommendations and implement agreed-to best practices;
- Configure/package software for deployment;
- Maintain a library of software source code;
- Document technology standards;
- Document the installation process;
- Provide anti-virus support including testing and provision of current virus signature files available from the anti-virus software vendor;
- Make recommendations regarding anti-virus technologies;
- Provide support to CITS security unit with respect to processes and the installation or change of standard technologies;
- Develop, maintain and publish user procedures with respect to the use or support of Workplace Support Services technologies;
- Install and test software, hardware, and other associated items in the test lab prior to implementation;
- Configure and integrate new technologies and perform integration testing;
- Recommend appropriate communication and printing protocols;
- Provide Level 2 technical support for all Core Software and Supported Software and related hardware, and;
- Provide Level 3 technical support for all TES created products.

8.11 SELF HELP AND KNOWLEDGE BASE

- A web-based end user 'self help' tool enabling end users to access their problem report tickets, check system status, and perform other automated services through the Province's standard web browser;
- Maintenance of unique customer 'self-help' knowledge files, and;
- Maintenance of frequently asked questions lists.

8.12 ASSET INVENTORY MANAGEMENT

- Single point of contact for asset tracking services;
- Maintenance of an asset tracking database;
- Updating of the Asset Inventory database, ensuring capture of changes caused by new Equipment, data scrubbing, movement of hardware and software, preparation and roll-out of assets to intended locations, move/add/change or technology refresh of assets, and asset retirement;
- An asset tracking process or IMAC process to track the installation, changes, removal and disposal of hardware and software;
- Ensuring asset tags are affixed to all hardware of value is part of the asset tracking process;
- Scheduling, management and performance of periodic physical asset audits;
- Development and coordination of schedules for access to all hardware and software when performing a physical inventory;
- Reconciliation of discrepancies between the asset tracking database and physical inventories;
- Provision of procedures for maintaining and updating inventory information in accordance with the asset tracking process;
- Provision of inventory reports in both hard and soft copy on a regular and ad hoc basis;
- Installation and maintenance of electronic asset tracking software as needed; and
- Management of the allocation of software licenses to end-users, recording and tracking of licenses throughout the asset lifecycle.

8.13 SOFTWARE ASSET TRACKING

- Manage procedures that maintain end user compliance with software standards and procurement levels and notify appropriate authorities of unauthorized software use and/or installations;
- Inform users on appropriate software and license restrictions;
- Track and evaluate license and maintenance agreements associated with the software assets;
- Register the Province's software licenses with vendors;
- Manage usage of installed software and provide reports and recommendations based on usage data;
- Evaluate and report on potential or wasteful software license situations; and
- Perform trend analysis and provide management reports on a regular and ad hoc basis.

8.14 DEPLOYMENT SERVICES

8.14.1 Stock Management

- Provide a secure 'restricted access' warehouse space with a loading dock for storage of the Asset Inventory;
- Manage the warehouse and oversee the stock management operations;
- Conduct shipping and receiving activities;
- Coordinate new orders with order management for additions/ replenishment of stock;
- Document receipt of stock items to order management including reconciliation of purchase orders to packing slips, resolving receipt discrepancies, affixing asset tags to all hardware of value, and then recording pertinent information for each item within the stock management system;
- Receive new or used equipment returned from the field into the warehouse;
- Coordinate pick up of equipment identified to be returned to stock from Client sites;
- Maintain status of each serialized item (available, reserved, under repair, retired, etc.);
- Perform physical inventory of warehouse stock and report on an agreed schedule;
- Supply equipment from inventory for IMAC and other project requests;
- Update the asset tracking database with details of each receipt or disbursement from stock;
- Recommend, monitor and adjust order points and replenishment order quantities;
- Provide warehouse inventory status reports on a regular and ad hoc basis;
- Provide stock management activity reports on items dispersed, including helpdesk ticket numbers, serial numbers (if applicable) and purchase order numbers on a regular and ad hoc basis;
- Provide information to Asset Inventory management to ensure their process requirements are met;
- Dispose of retired assets according to disposal processes of the Purchasing Services Branch of the Province;
- Erase Client data from hard drives pursuant to government standards, and;
- Protection of privacy and security prior to disposal of Workstations. CITS Security will audit erasure method periodically to ensure data is unrecoverable.

8.14.2 Image Management

- Receive Workstation images and install scripts from TES;
- Work with TES to establish and maintain effective processes and procedures regarding the distribution and use of standard images, scripts and documentation;
- Provide quality assurance testing of images developed by TES;
- Test installation scripts produced by TES for approved software applications;
- Store all Client standard images, software, and scripts in an electronically accessible location;
- Maintain catalogues of images, software and install scripts;
- Install images, approved software, installation scripts and documentation for approved requests;
- Maintain integrity of images, software and scripts;

- Create, maintain and/or edit documentation pertaining to images and scripts as they are installed, and;
- Prepare, test, maintain and install images on deployed Equipment under the various Workplace Support Services outlined above.

8.15 SECURITY (ID ADMINISTRATION AND INTERNET ACCESS)

- Provide user account security administration and management (user profiles, user membership in global groups, add/change/delete user accounts, password issuance and resets, access to file and print resources, etc.);
- Provide e-mail (MS Exchange) security administration and management (user accounts/mailboxes, aliases, profiles, generic mailboxes, distribution lists, public and shared folders and global access permissions, etc.);
- Provide virus protection administration and management;
- Provide internet access security administration and management;
- Provide Shared Provincial Access Network (SPAN/BC) remote access (dial/virtual private network) security administration and management;
- Provide a single point of contact for security administration functions for liaison with CITS for the purposes of change control;
- Perform security functions relating to Workplace Support Services and as described in Core Policy Manual;
- Review Workplace Support Services security policies and provide recommendation for improvement;
- Communicate security procedures to end users (via e-mail or other electronic media);
- Provide maintenance and clean up of inactive user ID's on a monthly basis;
- Respond to end user request for status updates and general inquires with respect to security administration functions;
- Follow the Province's procedures concerning "conditions of use" forms (that they be properly completed and signed) prior to issuing any system access;
- Provide logon support for end users;
- Maintain a log of user access requests and updates;
- Maintain approval matrices with other Clients;
- Periodically perform security audits for each of the security functions listed above;
- Investigate and report on suspect risk elements and recommend appropriate action;
- Participate in security administration and management (configuration files, login scripts, policy templates, local/global architectures, folder/directory/network share resources, directory services, domains, and digital certificates);
- Monitor and respond to IT infrastructure security breaches, and;
- Follow documented security procedures for intrusion detection.

8.16 BASELINE STATISTICS

Statistics below are estimated at time of issuance of the JSRFP.

Workload	<ul style="list-style-type: none"> • 90% of the approximately 30,000 users work between 7:00 am and 5:00 pm. • 65% of Workstations are utilized at any given time between 7:00 am and 5:00 pm.
Workstation Profile	<ul style="list-style-type: none"> • There are an estimated 26,000 to 27,000 desktop computers with an average age of 3+ years. • There are an estimated 3,000+ laptops with an average age of 2+ years. • There are an estimated 5,500+ printers with an average age of 3+ years. • There are an estimated 400+ plotters, scanners and other non-printer devices with an average age of 5+ years. • There are an estimated 600+ wireless PDAs (blackberries) that connect with Solutions BC messaging shared service (i.e. Microsoft Exchange) and there are an unknown number of PDAs across government that sync only with the user's local Workstation. • There are an estimated 31,000+ installations of productivity tools with 40% \pm of government using Office97, 20%\pm using Office2000, and 40% \pm using Microsoft OfficeXP. • Outlook is the default e-mail client on 70% \pm of the Workstations. This is expected to increase to 90% as large ministries complete their transition to the Solutions BC messaging shared service (i.e. Microsoft Exchange). • Internet Explorer (IE) and multi-media plug-ins are very common (approx. 99% penetration) with 85%\pm of the installation base at version 5.0 or better. Installed PDF readers tend to rely on Acrobat Reader 4.X or better. • Over 50% of Workstations have some form of software that performs Software Distribution and/or remote take-over and/or provides automated inventory information. • 99% \pm of Workstations are estimated to have anti-virus tools installed.
Deployment	<ul style="list-style-type: none"> • Many different deployment methodologies and deployment products exist within government as it attempts to manage 1,400 \pm geographically dispersed locations across BC.

Support Profile	<ul style="list-style-type: none"> • Government generally plans and operates its Workplace Support Services environment and buys the tools rather than builds them directly. • Support levels and techniques vary from Client to Client and geographic region to region.
Quality of Assets	<ul style="list-style-type: none"> • The overall quality of the assets deployed in government is viewed as moderate due to their adequate capacity to perform existing business functions. • There is a lack of standards and a significant portion of the asset base is over 2 years in age.
Availability and Response Requirements	<ul style="list-style-type: none"> • Workstation services products are not mission critical to the operation as a whole, but instead are best viewed as business critical (according to Year 2000 project terminology). • Hours of operation are 24 hours by 7 days a week, but more typically fall between 7:00am and 5:00pm Pacific Standard Time. • Failures at a single user level occur on a seldom but consistent basis (e.g. printing problem, corrupt installations, a broken hard drive). Large-scale failures of Workstation occur very rarely; however, their occurrence severely impacts government's ability to deliver services (e.g. a virus that wipes out many Workstation hard drives).
Recovery Capability	<ul style="list-style-type: none"> • Ability to recover varies from Client to Client based on installed technology (like remote take-over), geographic distance (urban versus rural) and the cause of the failure (e.g. hardware product line recall by the manufacturer versus a single hard drive failure). • Generally, a complete replacement Workstation can be on a user's desk within 5 business days. Less time is required where on-site hot-swap inventories exist.
Inter-Dependencies	<ul style="list-style-type: none"> • Currently, Workstation services are very tightly bound to all aspects of government technology infrastructure. Several out of scope infrastructure domains provide key back-office services (e.g. e-mail), as well as connection to shared resources (e.g. local area network and printing). • Stand alone computing remains the infrequent practice of the mobile worker who attempts a standard office connection at the earliest possible convenience to re-engage disconnected services like virus/patch update, e-mail update, Shared File, Print and Storage services, shared application/DB connections, etc.

8.17 ASSET INVENTORY

CITS recently (October 31, 2003) completed an independent assessment of the Workstation Asset Inventory with special attention given to Microsoft Windows XP migration readiness – the current government standard Workstation environment. The findings from this assessment concluded that from within the 28,095 Workstations surveyed across government:

- 15,503 systems will require substantial upgrading to meet CITS current standards;
- 5,236 systems are at risk and should be brought up to standard immediately.

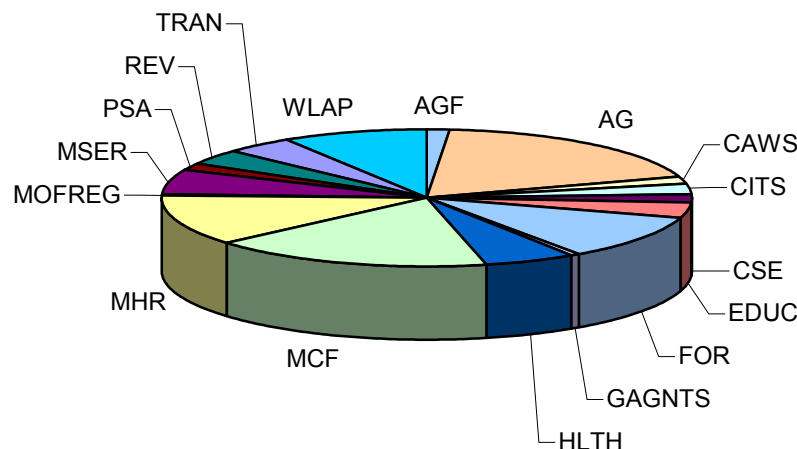
The area-specific summaries as at October 31, 2003, are detailed below:

Number of Workstations by Organization

Agriculture, Food & Fisheries (AGF)	377
Attorney General (AG)	5256
Community, Aboriginal & Woman's Services (CAWS)	486
Common IT Services (CITS)	688
Competition, Science & Enterprise (CSE)	526
Education (EDUC)	999
Forests (FOR)	2964
Government Agents (GAGNTS)	143
Health (HLTH)	1608
Children & Family Development (MCF)	4806
Human Resources (MSER)	3372
Finance Registries (MOFREG)	110
Government Services (MSER)	1595
Public Service Agency (PSA)	457
Provincial Revenue (REV)	1062
Transportation (TRAN)	1181
Water, Land & Air Protection (WLAP)	2465

Total number of systems inventoried: 28095

Chart 1- Inventoried Assets by Organization



Workstation Summary

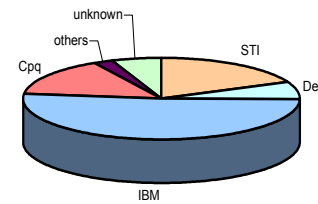
By Manufacturer

Total number of assets by manufacturer:

Seanix Technology Inc.	5225
Dell Computer Corp.	1977
IBM	14728
Compaq	4256
Other*	660
Undetermined	1632

* Toshiba, NEC, HP, Matsushita, others

Chart 2 - Assets by Manufacturer



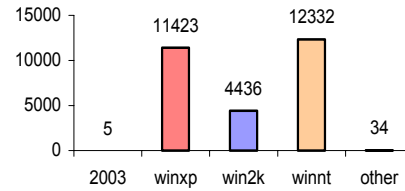
By Operating System

Total operating system distribution:

Windows 2003	5
Windows XP	11423
Windows 2000	4436
Windows NT	12332
Other*	34

* Windows 95, Windows 98, Windows ME

Chart 3 - Operating System Type

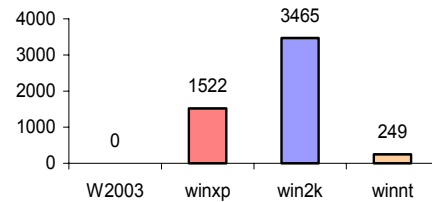


Security Risk Analysis

Count of systems inventoried that require service pack updates to protect against virus attacks.

Windows 2003	0
Windows XP	1522
Windows 2000	3465
Windows NT	249
total:	5236

Chart 4 - Systems at Risk



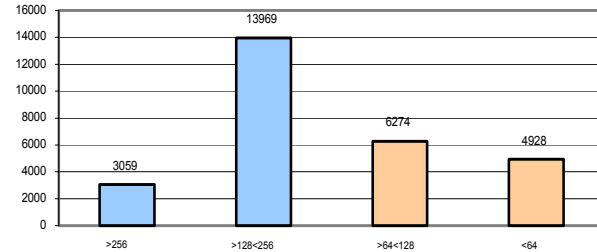
Hardware Summary

Installed RAM

Greater than 256 MB	3059
Between 128 and 256 MB	13969
Between 64 and 128 MB *	6274
Less than 64 MB*	4928

*These units do not meet the CITS standard for Windows XP.

Chart 5 - Amount of Installed RAM

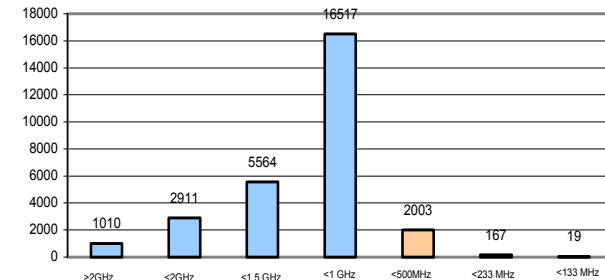


Processor Type

Greater than 2 GHz	1010
Between 1.5 and 2 GHz	2911
Between 1 and 1.5 GHz	5564
Between 400 and 999 MHz	16517
Between 233 and 400 MHz*	2003
Between 133 and 233 MHz*	167
Less than 133 MHz*	19

*These units do not meet the CITS standard for Windows XP.

Chart 6 - Processor Type

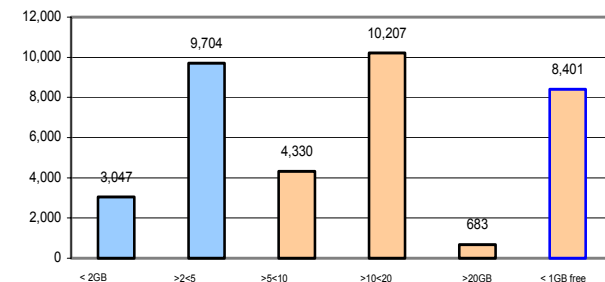


Drive Size (C:)

Greater than 20 GB Total	3,047
Between 10 and 20 GB Total	9,704
Between 5 and 10 GB Total	4,330
Between 2 and 5 GB Total	10,207
Less than 2GB Total	683
Less than 1 GB of Free Space*	8,401

* These units have limited functionality and may not have the capacity to receive software updates.

Chart 7 - Drive Size (C:)



Windows XP Readiness

Hardware compliancy with the CITS minimum workstation specifications for running the Windows XP operating system by total count.
 400 MHz central processor, 128 MB of physical RAM, and 20 GB of hard drive space.

Chart 8 - XP Ready Systems

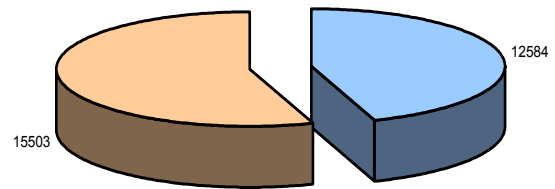
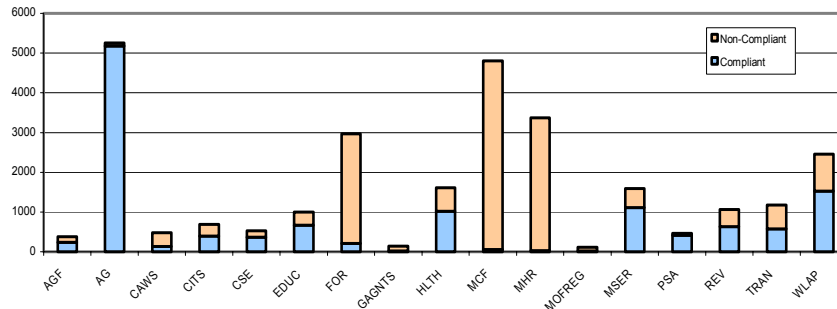


Chart 9 - Readiness Breakdown



	Total	Compliant	NC	% Ready
Agriculture, Food & Fisheries	377	234	143	62%
Attorney General	5256	5179	77	99%
Community, Aboriginal & Women's	486	135	348	28%
Common IT Services	688	399	289	58%
Competition, Science & Enterprise	526	368	158	70%
Education, Advanced Education, & Skills	992	673	325	68%
Forests	2964	210	2754	7%
Government Agents	143	16	127	11%
Health	1608	1014	593	63%
Children & Family Development	4806	58	4748	1%
Human Resources	3372	25	3347	1%
Finance Registries	110	18	92	16%
Government Services	1595	1114	481	70%
Public Service Agency	457	411	46	90%
Provincial Revenue	1062	630	431	59%
Transportation	1181	577	604	49%
Water, Land & Air Protection	2465	1523	940	62%

15503 units are non compliant and require updating or replacement

9 APPENDIX E – WORKPLACE SUPPORT RECOMMENDATIONS

The following extract is taken from the ITSSC Recommendations Report v1.1 of July, 2001 which describes the “To Be” service levels for Workplace Support Services. These recommendations have not been fully implemented across all Ministries. The objective of the recommendations was to achieve:

“One Service Level across government- geographically dependant with special handling’ is recommended based on the ease of developing common processes for support and the simplicity of managing service delivery and corresponding service levels.”

9.1. SUPPORT COMMUNITY CLASSIFICATIONS

There are limitations to providing the same service levels for desk side support across geographically dispersed areas. The following Support Community classifications were developed based on the availability of desk side support.

Support Community	Definition
Urban/Regional	Complete and comprehensive technical support available locally.
Rural	Limited technical support available locally.
Remote	No technical support available locally.

9.2 SERVICES, DESCRIPTIONS, AND SERVICE LEVELS

The following table identifies the services that are considered core for all government. The times provided in the Service Level column refer to business days and business hours.

Service Area	Service	Service Description	Service Level	Performance Measure	Comments
Procurement & Asset Tracking					
<i>Quotes</i>					
	Standard software	Time to provide a price for standard software	< 2 days	95% on a monthly basis	Recommended for web based delivery
	Non-standard software	Time to provide a price for non-standard software	Vendor dependent		
	Standard hardware	Time to provide a price for standard hardware	< 2 days	95% on a monthly basis	Recommended for web based delivery
	Non-standard hardware	Time to provide a price for non-standard software	Vendor dependent		
	Catalog prices updated	Accuracy of standard software or hardware catalogue prices	> 95%	Updated monthly	Recommended for web based delivery
Order Management					
	Order placement	Placement of order from time approved request is received	< 1 day	95% on a monthly basis	Recommended for web based delivery
<i>Inventory</i>					
	Inventory report	Accuracy of information regarding assets in use on a Client basis	> 95%	Quarterly	
Service Desk					
<i>Response</i>					
	Average speed to answer	Time for agent to answer call after IVR selection is made	< 30 seconds	75% on a monthly basis	
	Calls answered by an Agent	Percentage of calls that must be answered by an agent	> 75%	95% on a monthly basis	

Service Area	Service	Service Description	Service Level	Performance Measure	Comments
	Abandoned calls	Percentage of calls where a user disconnects before agent answers call	< 3% of calls	Monthly	
	Respond to e-mail	Time to respond with ticket details after an e-mail has been received	< 60 minutes	75% on a monthly basis	
	Respond to voice mail	Time to respond with ticket details after a voice mail has been left	< 60 minutes	75% on a monthly basis	
Resolution					
	1st Call resolution rate	Percentage of calls that are to be resolved at the first point of contact except those transferred to Problem/Change	> 80%	Monthly	
	Notification of status change	Time to notify users or Service Delivery Coordinator of a change in prioritization, escalation, change requests	Process dependent		
Satisfaction					
	Customer satisfaction	Percentage of respondents who are satisfied or very satisfied	> 85%	Monthly	Based on ratings of unsatisfied, somewhat satisfied, satisfied, and very satisfied
	Satisfaction survey sampling	Sampling of callers to the Service Desk	> 10%	Sampling by Client, call type, priority, and other.	Requires a statistically significant sampling size
Services					
ID Management					
	Password reset	Time for an agent to reset a password once an authorized request is received	< 60 minutes	99% on a monthly basis	Recommended web based functionality
	Create new user	Time to create a new user account once authorized request is received	< 2 days	95% on a monthly basis	Includes account creation, home directory, and e-mail

Service Area	Service	Service Description	Service Level	Performance Measure	Comments
	Modify/delete ID	Time to modify or delete an account once authorized request is received	< 1 day	95% on a monthly basis	
	Create new e-mail ID	Time to create a new e-mail account once authorized request is received	< 2 days	95% on a monthly basis	Generally defined as resource accounts
	Transfer e-mail mailbox to/from Ministry	Time to migrate user data from one Client to another once authorized request is received	< 3 days	95% on a monthly basis	Based on a single user
	Change data access permissions	Time to complete permission changes once an authorized request is received	< 2 days	95% on a monthly basis	Based on a single user
Security					
	Security service update - emergency notifications	Time to notify all affected parties of critical security issues and breaches	Immediate	99% per occurrence	
	Security services update - general notifications	Time to notify all affected parties of general security issues and breaches	< 2 days	99% per occurrence	
	Respond to client virus query/ problem	Time to respond to a virus query/ problem	< 2 hours	95% on a monthly basis	Based on a single user
	Respond to access violation	Time to respond to an access violation	< 2 hours	95% on a monthly basis	Based on a single user
Desktop Services					
	Scheduling and execution of builds, IMACs for 10 or more network devices	Time to complete activities once an authorized request is received	Negotiated		Network devices include PCs, laptops, printers, etc. Activities involving 10 or more network devices are considered a project
	Execution of Builds, IMAC	Time to complete activities once an authorized request is received	< 2 days	95% on a monthly basis	Activities involving less than 10 network devices are not considered

Service Area	Service	Service Description	Service Level	Performance Measure	Comments
					a project.
	Install supported software product	Time to install supported software product from time authorized request is received	< 2 days	95% on a monthly basis	Recommended that automated software distribution tools be used
	Install supported hardware product	Time to install supported hardware product from time authorized request is received	< 2 days - Urban/Regional < 4 days- Rural < 5 days- Remote	95% on a monthly basis	
	Supported software problems - on site	Time to respond to on site requests for supported software incidents	< 4 hours - Urban/Regional < 8 hours – Rural < 12 hours - Remote	95% on a monthly basis	Recommended automated takeover tools be used
	Supported software problems - resolution time	Time to resolve supported software incidents	< 3 days	95% on a monthly basis	Recommended automated takeover tools be used
	Supported hardware - on site	Time to respond to on site requests for supported hardware incidents	< 4 hours - Urban/Regional < 8 hours - Rural < 12 hours - Remote	95% on a monthly basis	
	Supported hardware - resolution time	Time to resolve supported hardware incidents	< 3 days	95% on a monthly basis	
	Base image refresh	Time to re-image a system once request received	< 1 day	95% on a monthly basis	Recommended that automated software distribution tools be used

9.3 SPECIAL HANDLING

It was identified during the As-Is analysis that there are unique situations, applications, environments, and users in most, if not all, ministries that require special handling beyond standard service delivery processes, service levels, or prioritization schemes. Using the 80/20 rule as a guide, the Service Desk model will support the majority of incidents through general support processes. The remaining incidents, because of their unique requirements, can burden the Service Desk and inappropriately over utilize resources. To immediately flag these unique calls, an identification scheme will be implemented to allow for their immediate redirection. Redirection will allow access to resources that are well versed in the unique situations, processes, or environments. Areas recommended for special handling include:

Special Handling Classification	Definition
Mission critical services	<ul style="list-style-type: none"> • These services directly impact the safety and security of people across the province. Examples of these services include fire management and avalanche response.
Business critical services	<ul style="list-style-type: none"> • These services provide a high level of exposure to core business functions. Examples of these services include monetary intake systems and pollution response.
Critical business cycles	<ul style="list-style-type: none"> • There are business functions being performed within ministries that are only critical during specific cycles. Examples of these would include budget cycles for all ministries, gas title purchases, and income assistance cheque distribution.
VIP users	<ul style="list-style-type: none"> • As with any organization, there are users whose requirements for service exceed the standard offerings. These users are typically the executives from each Client and their support staff as well as high profile users such as Chief Justices and Treaty Negotiators.
High security environments	<ul style="list-style-type: none"> • Due to the nature of some of the functions provided by government, the need for highly secure, restrictive access environments exists. Generally, higher levels of security clearance, such as bonded staff, are required and there is usually a strong preference for the same resource to be deployed.

9.4 SERVICE DELIVERY REPORTING AND REVIEW

9.4.1 Service Delivery Reporting

Reporting specifics will be dependent on the automated data available from the Peregrine implementation. To increase the value of the information available, it is recommended that the reporting offerings be divided as follows:

9.4.2 Management Reporting

Currently two reports are available and used:

Digital Dashboard. This report is a roll up of key operational metrics status represented by colour coding. Three colours: green, yellow, and red are used to identify the achievement status of metric groupings. Green signifies that all, or most, of the underlying metrics have been attained, yellow signifies that a predetermined number of underlying metrics have not been attained, and red identifies where an unacceptable number of underlying metrics have not been attained. Metric weightings are usually applied to capture the impact of critical metrics and chronic non-attainment.

Significant activities. This report details, from an anecdotal perspective, all significant activities within the reporting period.

9.4.3 Operational Reporting

The following tools are used for operational reporting:

- *Detailed Metrics.* This report is an itemized list of every metric that is captured through automated means. It is intended to provide a detailed view of the services and the associated service level attainment data;
- *Root Cause Analysis.* This report provides an analysis of every missed service level and would include impact, cause, remedy, proactive management, and recommendations. It is intended as input into continuous improvement and problem management practices as defined by ITIL; and
- *Trending Analysis.* This report is the statistical interpretation of long term service level metrics. It identifies negative and positive trends and makes recommendations based on those observations.

9.4.4 Ministry-specific Reporting

Ad Hoc. Each Client will have the ability to query service delivery data on an ad hoc basis. The Client will be limited to information pertaining to only their Client and access will be assigned to a limited number of resources, based on necessity. It is anticipated that ministries will use this to monitor specific incidents, gather daily/weekly stats, and do trending analysis on Client-specific incidents. The Client will have access to aggregated metrics.

9.4.5 Service Delivery Review Process

The Shared Services organization will be responsible for the management of all aspects being provided under shared services. It is recommended that this organization provide service level reviews and that all ministries are represented in this review process. Specific areas to be reviewed include:

- On a monthly basis, operational staff from Shared Services and the ministries will review service level attainment to identify performance issues, review root cause analysis reports, and identify continuous improvement opportunities; and
- On a quarterly basis, management staff from Shared Services and the ministries will meet to review the inclusion or exclusion of services, the adjustment of service levels to best meet ministries' and Government's business needs, and the refinement of service delivery processes.

9.5 INCIDENT PRIORITIES AND ESCALATION

All services are to be provided within the associated service level but it is recognized that sometimes responses must be geared to reflect business impact. The following escalation matrix applies to incidents. Where a determination is made, based on the Priority Definitions matrix, the following automated escalation scheme is recommended for formal notification.

9.5.1 Priority Definitions for Incidents

Priority	Classification	Incident Extent
1 (Critical) <i>Automatic notification to Ministry Service Delivery Coordinator</i>	Incidents affecting the ability of the client and its staff, where there is: <ul style="list-style-type: none"> • No work-around or manual process; • Must be resolved immediately; work to continue until trouble is resolved; and • Indicates a total inability to function resulting in a critical impact on the client's operation. All involved parties are expected to work continuously until a priority 1 incident is resolved, or the priority is reduced. 	Very high business impact
2 (High)	Incidents affecting the ability of the client and its staff, where there is: <ul style="list-style-type: none"> • Limited work-around available; • Must be resolved quickly to minimize impact; and • Indicates some functionality but operation is severely degraded. Work by all involved parties is expected to continue on a workday basis until a solution is in place or the priority is reduced. 	High business impact
3 (Medium)	Incidents affecting the ability of the client and its staff, where there is; <ul style="list-style-type: none"> • Work-around available; • Needs to be resolved within defined service levels; • Indicates an ability to use all critical functionality. 	Moderate business impact
4 (Low)	Incidents affecting the ability of the client and its staff, where there is: <ul style="list-style-type: none"> • Minor impairment; • No work-around necessary; • Should be resolved within defined service levels; and • Indicates that the incident has been circumvented or does not seriously affect the client's operations. 	Low business impact

9.5.2 Service Desk Escalation of Unresolved Calls related to Incidents

Escalation Event	Time Criteria	Ministry Notification:
Priority 1 unresolved.	1 Hour	Service Delivery Coordinator
Priority 2 unresolved.	1 Day	Service Delivery Coordinator
Priority 3 unresolved.	5 Days	Service Delivery Coordinator
Priority 4 unresolved.	20 Days	Service Delivery Coordinator

9.6 SERVICE DELIVERY ROLES AND RESPONSIBILITIES

9.6.1 Ministry – Service Delivery Coordinator Responsibilities:

- Monitors service level attainment on a monthly basis;
- Reviews alignment between service delivery and business requirements;
- Monitors and reviews customer satisfaction surveys;
- Acts as primary contact for service level escalation issues and critical service requests;
- Communicates service delivery concerns/issues;
- Communicates service delivery to Client staff;
- Communicates escalated calls to Client management chain; and
- Coordinates project related change management.

9.6.2 IT Shared Services - Client Relationship Manager Responsibilities:

- Single point of contact for the Ministry;
- Communication of service delivery concerns and issues;
- Ensures that Ministry service levels are being attained by CITS;
- Acts as primary contact for CITS for service level escalation issues and critical service requests;
- Communication of service delivery information;
- Coordinates customer and performance satisfaction surveys for services CITS provides;
- Coordinates project related change management;
- Understand Ministry business plans and brings that perspective to CITS;
- Accesses services and expertise from CITS to ensure customer requirements are addressed;
- Manages relationships between Ministry and CITS; and
- Negotiates service level agreements.

9.7 DESKTOP CONFIGURATION MANAGEMENT MODEL

The desktop configuration management model consists of the following areas: software classes, hardware classes, user classes, deployment, and desktop hardware and software standards review process.

9.7.1 Software Classes

This section identifies the recommended classes of software and their implications for support.

Class	Core	Supported	Ministry-Specific	Unsupported
Definition	<ul style="list-style-type: none"> ▪ Standard build ▪ Applies to all desktops ▪ Fully supported and licensed ▪ Centrally managed: <ul style="list-style-type: none"> ▪ Installation ▪ Re-installation ▪ Patch ▪ Upgrades 	<ul style="list-style-type: none"> ▪ Optional ▪ Applies to selected desktops ▪ Fully supported and licensed ▪ Centrally managed: <ul style="list-style-type: none"> ▪ Installation ▪ Re-installation ▪ Patch ▪ Upgrades 	<ul style="list-style-type: none"> ▪ Ministry-supported ▪ Best effort support available from Service Desk (time limited support effort) 	<ul style="list-style-type: none"> ▪ No Support provided ▪ User is solely responsible for support ▪ Approved by Ministry
Inclusions	<ul style="list-style-type: none"> ▪ MS Windows based operating system ▪ MS Office Standard ▪ Virus protection (Norton) ▪ Adobe Acrobat Reader ▪ Browser (IE) ▪ E-mail (Outlook) ▪ Calendaring (Outlook) ▪ File Compression (XP component, or other TAF recommendation) ▪ Desktop Mgmt (various) ▪ Remote assistance/take-over ▪ Asset management ▪ SW Distribution ▪ Thin client software (various) 	<ul style="list-style-type: none"> ▪ TAF list ▪ Corporate/cross-government applications (e.g., CRMS, CAS, CHIPS, CLIFF) ▪ Connectivity tools (3270 emulator, Telnet, etc.) 	<ul style="list-style-type: none"> ▪ Line-of-business applications ▪ Other applications that are not corporate/ cross-government ▪ Special Handling 	<ul style="list-style-type: none"> ▪ User-developed applications

9.7.2 Hardware Classes

The recommendation is to have the following four hardware classes defined on the Province's Desktop Roadmap.

Hardware Class	Description	Comment
Basic Desktop/Laptop	<ul style="list-style-type: none"> Currently defined (for desktops) as a Configuration A Workstation; undefined for laptops 	<ul style="list-style-type: none"> Suitable for 80 - 90% of all business requirements Create an basic laptop configuration
Advanced Desktop/Laptop	<ul style="list-style-type: none"> The essential non-configurable difference from Basic configuration is a faster CPU. 	<ul style="list-style-type: none"> Merge the current desktop configurations B and C into one category. Create an advanced laptop configuration
WinTerm	<ul style="list-style-type: none"> A thin client device, not capable of functioning standalone 	<ul style="list-style-type: none"> A terminal service must be purchased along with terminal
Specialized	<ul style="list-style-type: none"> Examples would be 'ruggedized' laptops, tablet PCs, test beds 	<ul style="list-style-type: none"> To be determined during asset transfer May have specialized support requirements

Additional peripherals or components, such as RAM, hard drives, CD/DVD, and monitor size, would be available on an 'a la carte' basis. The CPU would be the only unchangeable component.

9.7.3 User Classes

Managed access is defined by the permissions granted to a user on their desktop. A broad spectrum of user access policies currently exists across government.

We recommend that the basic level of desktop access permissions would prevent a user from installing any software and from changing the core software configuration. The highest level of desktop access permission would be granted to developers, who require full access rights in order to install software for development and testing.

User Classes	Description	Access Rights	Support
Knowledge worker	Has standard computing requirements	<ul style="list-style-type: none"> No Admin rights Limited access 	<ul style="list-style-type: none"> Full support of all core and supported software
Power user	Requires more access due to supported application requirements	<ul style="list-style-type: none"> Admin rights Limited access (More access is required to perform their additional job functions) 	<ul style="list-style-type: none"> Full support of all core and supported software
Developer	Requires application testing and development environment to do their job	<ul style="list-style-type: none"> Admin rights Full access 	<ul style="list-style-type: none"> Full support of all core and supported software No support for non-production applications

Currently 80-90% of government users should be in the knowledge worker class.

We also recommend that:

- Developers have a separate desktop for development, as opposed to standard business functions. This would enable standard business functionality to remain available when development systems undergo potentially extensive rebuilding processes, and would help to delineate which systems are supported; and
- Domain administrators be configured to always remain in the LocalAdmin group. This would enable administrator activities to be performed by resources with domain administrator access in the event that the local user's profile becomes corrupted or unavailable.

9.7.4 Deployment

We recommend that CITS be responsible for deploying all software to the desktop. This is to reduce costs and provide faster recovery times for desktop functionality, through a complete re-imaging capability and efficient maintenance of the configuration management database as defined by ITIL's best practices.

This would require that ministries provide CITS with a production-ready build tested application software release package prepared in accordance with CITS standards, tools, and guidelines.

9.7.5 Desktop Hardware and Software Standards Review Process

An existing body, the Technology Advisory Forum (TAF) has been identified as currently providing recommendations on hardware and software standards for use within government. TAF is comprised of Client representatives and CITS and is an effective forum for setting desktop hardware and software standards. We recommend that TAF continue in this role and that its role be expanded to manage the hardware classes defined in this document, review the desktop management system, and publish a definitive list of core and supported software (as is currently published at http://www.cio.gov.bc.ca/IT_Standards/s2.2.htm).

9.8 TRANSFER OF ASSETS

All hardware and software listed on the core and supported lists (excluding cross-government applications) will be owned by CITS. This would support the seat management concept and provide the benefits of centralized asset/license management, centralized procurement, economies of scale, and standardization of products. Identification and transfer of physical assets and licenses will be done during the implementation phase.

Although out of scope for this project, it is recommended that all of the assets transferred to CITS be supported by CITS.

9.9 SERVICE DESK MODEL RECOMMENDATIONS

The 'single point of contact for all government' model is recommended based on its simplicity for users and its end-to-end management of call tracking.

9.9.1 Information Technology Infrastructure Library (ITIL) Compliant

The recommended service desk model is based on ITIL's best practices framework. This framework identifies five service management functions: incident management, problem management, change management, release management, and configuration management. The service desk is defined as a function under ITIL.

9.9.2 Service Desk Services and Functions

9.9.2.1 General Services

It is recommended that the Service Desk provide:

- Single point of contact for users;
- Initial problem resolution;
- Incident management of all IT related calls;
- Dispatch to appropriate service areas including Client-specific application help desks; and
- Operationalization of service level agreements.

9.9.2.2 Access Services

It is recommended that access to the Service Desk be provided through a variety of methods, each of which can be integrated to Service Desk agent screens. This would include:

- Telephone (connection to an agent)
- Voice mail;
- E-mail;
- Web;

Walk in access will be discouraged due to the potential for 'queue jumping'. Faxed requests will be discouraged as there was little or no indication of this currently being offered in the ministries and it would be difficult to justify implementing a fax to Peregrine integration.

9.9.2.3 Self Help (Virtual Help Desk)

As the Knowledge Base matures, it is recommended that users be provided with web-based access so they can research, and potentially, resolve their own questions/problems.

9.9.2.4 General and User Information

To effectively support users and their environments, the following information is required, at a minimum, for the configuration management data base (CMDB):

- User Information;
 - User contact information;
 - Services subscribed to (entitlements);
 - Pre-defined service levels;
 - Desktop configurations associated with the user; and
 - Call or 'tombstone data' associated with the user.
-
- General Information;
 - Major infrastructure components;
 - Criticality of applications;
 - Number of users/locations;
 - Service levels associated with applications; and
 - Identity of applications tier support becomes known.

9.9.2.5 Functions

The service desk will provide the following functions:

- Incident logging;
- Automated incident tracking;
- Automated incident monitoring;
- Automated incident assignment;
- Automated incident escalation;
- Incident resolution;
- Automated data collection; and
- Reporting.

9.9.3 Hours of Service

It is recommended that the Service Desk be staffed between the hours of 7:00 a.m. and 6:00 p.m. on all government business days. Services requiring extended hours will be negotiated through special handling. Users can leave a voice mail, send an e-mail, or access information via the web on a 24 hour by 7 day a week basis but will only receive support during Service Desk hours of operation.

9.9.4 Desk Side Support

- *Urban/Regional Support Communities.* For areas that have complete and comprehensive technical support available locally, desk side support tickets will be transferred to the local desk side support coordinator for assignment.
- *Rural Support Communities.* For areas with limited technical support available locally, the desk side support tickets will be transferred to the regional IT coordinator for assignment.
- *Remote Support Communities.* For areas with no technical support available locally, the desk side support tickets will be transferred to the regional IT coordinator responsible for the zone or to a predefined support resource.

9.9.5 Ministry Specific Application Help Desks

Ministry-specific application help desks will provide a liaison between themselves and the IT service desk for management of Client-specific application incidents.

Integration of help desk toolsets between Client-specific application help desks and the IT service desk will be implemented to support incident management.

9.9.6 Ministry-specific Automated Call Routing

Implementation of automated call routing, also known as a phone tree, is recommended. This technology allows users to select from a pre-recorded list of Client-specific service options and have their calls directed based on their selections. Resources trained in the specific service area answer the directed calls. This enables users to self-direct their calls to the most appropriate area which increases first call resolution rates. Callers would have an option to select a service desk agent if they are unsure of which service area they require or if the options provided do not match their requirements.

10 APPENDIX F – CORE SOFTWARE

Function Category	Product Name/ Manufacturer	Product Version	Retirement Date	Manufacturer Sunset Date	Links/Comments
Operating System	Windows XP/ MS Corporation	Professional	Dec, 2006	Dec, 2008	http://support.microsoft.com/default.aspx?scid=fh;en-us;lifewin <ul style="list-style-type: none"> • Effective date – Sep 2002 • Patch list – SP1 Sep 2002, SP1a, Feb 2003 • Under review – Post-SP1aHotfixes • Last updated – Aug 26, 2003
Anti-Virus	Symantec Anti-Virus Corporate Ed./ Symantec Corporation	8.1	Jul, 2005	Jul, 2006	http://www.symantec.com/techsupp/enterprise/stratic/support_policy.html <p>Product tech support for a particular version of a client product ends 30 months after the version is migrated from Current to Prior. Assuming a new release version of SAV in May 2004, then v8.1 will be supported until July 2006</p> <ul style="list-style-type: none"> • Effective date – Sep 2003 • Patch list – Central Quarantine Server 3.2 for SAV CE 8.1 – Sep 2003 • Under review – none at this time • Last updated – Aug 26, 2003
Office Suite (Word processor, Spreadsheet, Presentation Graphics)	Office2003/ MS Corporation	Standard	Sep, 2008	Oct, 2010	http://support.microsoft.com/default.aspx?scid=fh;en-us:lifofficefam <ul style="list-style-type: none"> • Effective Date – Dec 2003 • Patch List – • Under review – initial release • Last updated – Nov 20, 2003
Web Browser	Internet/Windows Explorer MS Corporation	6.0	Dec, 2006	Dec, 2008	http://www.microsoft.com/windows/lifecycle/desktop/business/components.msp <ul style="list-style-type: none"> • See operating system for details
E-mail/ Calendaring	Outlook 2003 client/ MS Corporation		Sep, 2008	Jun, 2008	http://support.microsoft.com/default.aspx?scid=fh;en-us;lifofficefam <ul style="list-style-type: none"> • Effective Date – Dec 2003 • Patch List – • Under review – initial release

Function Category	Product Name/ Manufacturer	Product Version	Retirement Date	Manufacturer Sunset Date	Links/Comments
					<ul style="list-style-type: none"> Last updated – Nov 20, 2003
PDF reader	Acrobat Reader/ Adobe Systems Incorporated	6.0		Upon release of N+1	http://www.adobe.com/support/cfterms.html Sunset occurs when V8.X is released which has not been announced <ul style="list-style-type: none"> Effective Date – Jun 2003 Patch List –none Under review – none at this time Last updated – Aug 26, 2003
Media Player (As part of the Operating System. Other players are on the Supported Software list)	Windows Media Player/ MS Corporation	9 Series	Dec, 2006	Dec, 2008	http://www.microsoft.com/windows/lifecycle/desktop/business/components.mspix <ul style="list-style-type: none"> Effective Date – Jun 2003 Patch List –none Under review – none at this time Last updated – Aug 26, 2003
Java Components	VM/MS Corporation, JRE/Sun Microsystems Inc., and JInitiator/Oracle Corporation	Latest editions of each product			http://www.microsoft.com/java/default.htm and http://www.sun.com/learnabout/java/ and http://otn.oracle.com/software/htdocs/devlic.html?/software/products/developer/htdocs/jinit.htm <ul style="list-style-type: none"> Effective Date – Current Patch List – Under review – Last updated – Aug 26, 2003
Virtual desktop client software (DTS)	ICA Client/ Citrix Systems Inc	V 7.x			http://www.citrix.com/site/SS/supportThird.asp?sIID=5107&tIID=5109 <ul style="list-style-type: none"> Effective Date – Jun 2003 Patch List – Under review – none at this time Last updated – Aug 26, 2003
Workstation management	To be determined by Workstation service provider				
Remote take-	To be determined				

Function Category	Product Name/ Manufacturer	Product Version	Retirement Date	Manufacturer Sunset Date	Links/Comments
over/assistance	by Workstation service provider				
Asset management	To be determined by Workstation service provider				
Software Distribution	To be determined by Workstation service provider				
File Compression and Decompression (As part of the Operating System. Other utilities are on the Supported Software list)	Windows XP/ MS Corporation	Professional	Dec, 2006	Dec, 2008	http://support.microsoft.com/default.aspx?scid=fh;en-us;lifewin <ul style="list-style-type: none"> • See operating system for details

Notes:

1. Core Software is grouped according to functional category. Additional components will be included as required.
2. Core Software is commercially available as a general release 'shrink-wrap' product.
3. Core Software receives full support from the Solutions BC Service Centre.
4. Core Software will be reviewed on a regular basis. Major product releases (e.g. Microsoft Longhorn) whose general release is set in the future will be reviewed on a case by case basis and adopted through a CIO Governance Framework, which is documented separately.
5. Commercially available products that do not appear as Core Software will be designated as:
 - a. Supported Software (examples are operating systems other than Windows XP and planning tools like MS Project);
 - b. Ministry specific; or
 - c. Unsupported.
6. Retirement Date identifies the date that the product is no longer core. Typically, products that are retired from the Core Software list will move to the Supported Software list. This date will typically proceed the Manufacturer's sunset date by 2 years for major products (like OS and Office) and 1 year for less client impacting products (such as Antivirus software). Solutions BC may, at its discretion, identify sunset dates that occur after the Manufacturer sunset date.
7. Manufacturer Sunset Dates are derived from software manufacturer's published product support lifecycle. The dates shown in this table indicate the date when the software manufacturer will no longer provide hotfix and security patch support. Under government's Select agreements and current logic to extend product lifecycles to their maximum, this term ends when the product's "mainstream and no-charge incident" support and "extended (for additional fee)" support cycles have expired.
8. Operating Systems will include every imbedded component as part of the core offering, with the following exceptions:

- a. any OEM games;
- b. MSN Explorer;
- c. MSN Messenger;
- d. MS Chat; and
- e. MS Dialler.

9. Web Browsers will support FTP and other functions bundled within the web browser product.

11 APPENDIX G – CORPORATE SOFTWARE

Application Name	Description
Peoplesoft (CHIPS)	Human resource and payroll information system
Oracle Financials (CAS)	Government wide accounting system with many sub modules implemented
Correspondence Tracking System (CTS)	Correspondence tracking and management system (CLIFF)
Corporate Request Tracking System (CRTS)	Tracks all FOI requests received by government
IT Information Management System (ITIMS)	Incident and request manager for voice and data networks
Workflow Engine and Librarian (EFI)	A software application to be used by employees of the BC provincial government to create, route, and approve a variety of electronic forms.
Electronic Forms (EFI)	Multiple corporate e-forms - a software application to be used by employees of the BC provincial government to create, route, and approve a variety of electronic forms.
Exchange E-Forms	Electronic forms that are accessible through the MS_Exchange server. The forms are routable data objects that lack a central repository and reliable audibility
FOI Request Tracking System (CRTS)	Permits ministries to track requests for information received under the FOIPP Act, to provide reports required by their executives and to administer the operational requirements of the FOIPP Act in a timely and efficient manner. It also permits CPIAB to corporately monitor the administration of the FOIPP Act, and produce reports and analysis
Executive Reporting Application (ERA)	Provides a dashboard for reporting and tracking ministries' progress towards achieving the goals and objectives in their service plans
Corporate Project Registry (CPR)	Provides web-based access to e-Government project information
Signing Authority System (SAS)	Allows government employees to administer and maintain a signing authority matrix
Product Management Methodology (PMM)	Offers a number of on-line forms, tools and guidelines for use in the management of projects

Shared Applications used by more than 2 ministries

Corporate Records Management System CRMS)	Manages individual customer records through their life cycle from creation to disposition.
E-Surveyor	Provides a graphical view of customer/client satisfaction as measured using the Common Measurement Methodology (CMM) and BC Stats. CMM measures satisfaction in a way that can be compared to other measures within the Ministry and across government.
Shared Library Service (Sydney+)	Provides a common infrastructure and software for the management of Ministry libraries – enabling networked, fully integrated physical and digital resource centers for government employees.
Electronic Data Interchange (EDI)	Enables the BC Government to exchange information with internal or external trading partners independently of either partner's computer system.
Archive & Records Information System (ARIS)	Manages corporate records from Client disposal to final disposition.

Application Name	Description
Service Plan Reporting System	A web-based front end that will provide a dashboard of Client progress towards performance targets.
Balanced Scorecard System	A simple web-based system that utilizes a balanced scorecard approach to performance measurement. The system relies on a standardized spreadsheet to identify and report on various performance measures. Progress is reported regularly via the spreadsheets and this data is manipulated to produce web reports.
Resource / Equipment Sharing Application	Provides the ability to schedule resources (meeting rooms, vehicles, equipment) anywhere in the province - specifically used in the Regions
Case Information Tracking and Reporting	Provides the ability to collect, organize and search for information about people; organizations; clients; issues; outcomes; files; emails etc. in one Oracle based system.
Enterprise Documents and Records Management System (EDRMS)	Manages both physical and electronic customer records through their life cycle from creation to disposition. Also known as TRIM.
Corporate Forecasting System (CFS)	A tool for line managers to manage budgets, actual expenditures and forecasted expenditures to a greater level of detail than the CAS Chart of Accounts allows.
Enterprise Risk Management software (PEAK)	Supplied by the Risk Management Branch of the Ministry of Finance

12 APPENDIX H – SUPPORTED SOFTWARE

The following table provides a sample list of Supported Software. The table is intended to illustrate the wide variety and versions of Client Supported Software as well as demonstrate the varied levels of support expected for any given Supported Software product. This list is not a definitive list and the 'Scope of support' ratings should not be considered accurate. The actual Supported Software list is currently under development with the CIO Officer and its completion is anticipated before April, 2004.

Function Category	Product Name/ Manufacturer	Product Version	Scope of Support	CITS Effective Date	CITS Sunset Date
Operating System	Windows NT Workstation/ MS Corporation	4.0 sp6	Full support		Yet to be determined
	Windows 2000/ MS Corporation	Professional sp3	Full support		Yet to be determined
Anti-Virus	McAfee Security VirusScan/ Network Associates Inc	4.X	Best effort		Yet to be determined
	Norton AntiVirus Corporate Ed./ Symantec Corporation	7.6	Full support		Yet to be determined
Office Suite (Word processor, Spreadsheet, Presentation Graphics)	Office97/ MS Corporation	Standard	Full support		Yet to be determined
	Office2000/ MS Corporation	Standard	Full support		Yet to be determined
	OfficeXP/ MS Corporation	Standard	Full support		Yet to be determined
Web Browser	Navigator or Communicator/ Netscape	All versions	Best effort		Yet to be determined
	Internet Explorer/ MS Corporation	5.01	Full support		Yet to be determined
	Internet Explorer/ MS Corporation	5.5	Full support		Yet to be determined
E-mail/Calendar	Outlook 98 client/ MS Corporation		Full support		Yet to be determined
	Outlook 2000 client/ MS Corporation		Full support		Yet to be determined

Function Category	Product Name/ Manufacturer	Product Version	Scope of Support	CITS Effective Date	CITS Sunset Date
	MS Corporation				
	Outlook 2002 client/ MS Corporation		Full support		Yet to be determined
PDF reader	Acrobat Reader/ Adobe Systems Incorporated	4.X	Full support		Yet to be determined
	Acrobat Reader/ Adobe Systems Incorporated	5.1	Full support		Yet to be determined
Media Player	Windows Media Player/ MS Corporation	6.4	Full support		Yet to be determined
	Windows Media Player/ MS Corporation	9	Full support		Yet to be determined
	Shockwave/ Macromedia	7	Best effort		Yet to be determined
	Quicktime/ QuickTime	various	Best effort		Yet to be determined
	RealPlayer/ RealPlayer	8	Best effort		Yet to be determined
Virtual desktop client software (DTS)	ICA Client/ Citrix Systems Inc	4.X, 5.X	Full support		Yet to be determined
	ICA Client/ Citrix Systems Inc	6.31	Full support		Yet to be determined
File Compression and Decompression	Winzip/ Winzip	Pre 8.0	Best effort		Yet to be determined
	Winzip/ Winzip	8.0	Full support		Yet to be determined
Database management system	Access/ MS	97	Best effort		Yet to be determined
	Access/ MS	2000	Best effort		Yet to be determined
	Access/ MS	2002	Best effort		Yet to be determined
	Access/ MS	2003	Full Support		Yet to be determined

Function Category	Product Name/ Manufacturer	Product Version	Scope of Support	CITS Effective Date	CITS Sunset Date
	MS				
	Filemaker/ Filemaker	Pro6	Best effort		Yet to be determined
Project Management	MS Project/ MS	98	Best effort		Yet to be determined
	MS Project/ MS	2000 for Windows	Full support		Yet to be determined
	MS Project (Professional and Standard)/ MS	2002	Full support		Yet to be determined
Statistical	SPSS/ SPSS	various	Third party		Yet to be determined
Financial	AccPac/ Simply Accounting	various	Third party		Yet to be determined
Database access client	Oracle SQL client for windows/ Oracle	8i	Yet to be determined		Yet to be determined
	Oracle SQL client for windows/ Oracle	9i	Yet to be determined		Yet to be determined
Report Writer	Crystal Reports/ Seagate	7.0	Yet to be determined		Yet to be determined
	Crystal Reports/ Seagate	9.0 Pro	Yet to be determined		Yet to be determined
Business Drawing	Visio (Professional and Standard)/ MS	5.X	Yet to be determined		Yet to be determined
	Visio (Professional and Standard)/ MS	2000	Yet to be determined		Yet to be determined
	Visio (Professional and Standard)/ MS	2002	Yet to be determined		Yet to be determined
PDF Creator	Acrobat/ Adobe	4.X	Yet to be determined		Yet to be determined

Function Category	Product Name/ Manufacturer	Product Version	Scope of Support	CITS Effective Date	CITS Sunset Date
	Acrobat/ Adobe	5.X	Yet to be determined		Yet to be determined
	Acrobat/ Abode	6.X	Yet to be determined		Yet to be determined
Desktop Publishing	PageMaker Plus/ Adobe	6.X	Yet to be determined		Yet to be determined
	PageMaker Plus/ Adobe	7.X	Yet to be determined		Yet to be determined
	Publisher/ MS	6.X	Yet to be determined		Yet to be determined
Form Publishing	Formtools/ Hallogram	4.X	Yet to be determined		Yet to be determined
Web Publishing	DreamWeaver/ MarcoMedia	4.X	Yet to be determined		Yet to be determined
	FrontPage/ MS	98	Yet to be determined		Yet to be determined
	FrontPage/ MS	2000	Yet to be determined		Yet to be determined
	FrontPage/ MS	2002	Yet to be determined		Yet to be determined
Terminal Emulation	Personal Communications (PCOMM)/ IBM	4.3	Yet to be determined		Yet to be determined
	Extra! Attachmate	Personal client for Win32	Yet to be determined		Yet to be determined
	Pathworks VT320 for CHR/ Compaq		Yet to be determined		Yet to be determined
	Powerterm/ Ericom	Interconnect	Yet to be determined		Yet to be determined
Dial up communications	RAS as part of various OS/ MS	X	Yet to be determined		Yet to be determined

Function Category	Product Name/ Manufacturer	Product Version	Scope of Support	CITS Effective Date	CITS Sunset Date
Virtual Private Network	Extranet Network Client (from CITS)/ Bay Networks	2.X	Yet to be determined		Yet to be determined
	VPN Client/ Nortel	3.7	Yet to be determined		Yet to be determined
Digital Image Editor	Photoshop/ Adobe	5.5	Yet to be determined		Yet to be determined
	Image Composer/ MS	X	Yet to be determined		Yet to be determined
Voice Dictation	Naturally Speaking Pro/ Dragon	4.0	Yet to be determined		Yet to be determined
Bibliography editor	Endnote/ Endnote	3.X	Yet to be determined		Yet to be determined
Application Development Environment	Internet Developer Suite/ Oracle	9i	Yet to be determined		Yet to be determined
Automation Scripting	Visual Basic Professional/ MS	6.0	Yet to be determined		Yet to be determined
PDA Software	Hotsync/ Palm Inc	4.X	Yet to be determined		Yet to be determined
Mapping	Mapinfo Pro/ Mapinfo	5.5	Yet to be determined		Yet to be determined
Contact Management	Maximizer/ Multiactive	5.5	Yet to be determined		Yet to be determined
Video Conferencing	Netmeeting/ MS	X	Yet to be determined		Yet to be determined
Optical Character Recognition	Omnipage Pro/	10	Yet to be determined		Yet to be determined

Function Category	Product Name/ Manufacturer	Product Version	Scope of Support	CITS Effective Date	CITS Sunset Date
	Scansoft				
Organizational Charting	Org Plus/ Human Concepts	3.01	Yet to be determined		Yet to be determined
Keyboarding Tutor	UltraKey/ Bytes of Learning	X	Yet to be determined		Yet to be determined
Printing Assistant	PrintKey/ WareCentral	2000	Yet to be determined		Yet to be determined
Test Administration	Test Administration/ Tapdance	X	Yet to be determined		Yet to be determined
Other	PCAnywhere/ Symantec	9	Yet to be determined		Yet to be determined

- Supported Software are installed on Workstations and/or provided in Thin Client neighbourhoods AT THE CLIENT'S APPROVED request. The support for these products varies according to the product and its ability to produce executable outputs. Unless noted otherwise, Supported Software support includes:
 - Application operation questions – questions like “Why can't I print from ...?”
 - Application usage questions – questions like “How do I ...?”
 - Application patches and upgrades
- Once the CITS published sunset date for a product/version has elapsed then the product/version moves to an UNSUPPORTED status and the client can either:
 - Move the product and specific version to a line of business (LOB) status where the Ministry provides ‘over the phone’ support (i.e. no configuration changes permitted); or
 - arrange for 3rd party support through CITS; or
 - opt to not support the product and its specific version which then leaves the client to manage the software by themselves.
- Note – client access/local privileges to the Workstation for their personal support of unsupported product/versions will not be granted without proper Client access requests, approvals and commitments to pay for the new access privileges. A client without

local admin privileges to the Workstation will receive 're-image only' support from the Service Desk for all sunsetted products. This includes products/version supported by the client's helpdesk as well.

Support classifications:

- Full support – Service Desk covers all aspects of the product
- 3rd party – CITS arranged support provided by an outside party. Annual costs for this support will be estimated and included as part of the client's monthly fees.
- Best effort – best commercial effort available
- Reinstall – Service Desk will re-image the workstation back to the most current image stored in the Configuration Management Database (CMDB).

Re-imaging will be used as a 'final solution' and will be applied within some 'yet to be set' parameters that could include:

- Number of prior attempts to resolve this particular incident/problem
- Elapsed time spent to resolve this particular incident/problem
- Knowledge base on this particular incident/problem recommends re-image as the best practice
- Lack of other alternatives

Workstations with only partial or no lock down policies applied may require the client to restore any and all of their UNSUPPORTED products following the re-image.

Manufacturer Sunset Dates are set by software manufacturer's published product support lifecycle – and terminate when the manufacturer no longer provides hotfix and security patch support. Under Government's Select agreement and current logic to extend lifecycles to their maximum this term ends when the product's "mainstream and no-charge incident" support and "extended (for additional fee)" support cycles have expired. Gov't will ask workplace support service providers to bear any costs associated with the "extended (for additional fee)" support arrangements. Service providers, at their discretion may use Microsoft Gold Certified Partners for Support Services.

Info: A hotfix is a modification to the commercially available Microsoft product software code to address specific critical problems. Hotfixes are not intended for general installation by all customers, since they do not undergo extensive testing when they are created. Microsoft offers Extended Hotfix Support for some business and development products as those products mature in their product life cycles. Extended Hotfix Support is a fee-based support service that can be purchased once a product enters the Extended phase of the product life cycle. The Extended Support contract must be purchased in the first 90 days following end of the mainstream phase.