



October 28, 2004

To all Proponents,

It is my pleasure, on behalf of the Ministry of Management Services, to issue this Joint Solution Procurement Request for Proposal for the Project. This Project is a key initiative of the Ministry and is an important move forward for Service BC towards eventual Service Channel Integration.

Through this accelerated Joint Solution Procurement approach we intend to select a longer term Service Provider to work with the Ministry in delivering the Enquiry BC Project and who has the capability and capacity to develop future solutions in support of the Ministry's Service Channel Integration initiative. The procurement approach outlined in this document reflects a JSP method which will result in an expedited Solution for implementation of core services by April 1<sup>st</sup>, 2005.

I look forward to your Proposals and thank you in advance for the time and effort you will contribute to this procurement process.

Yours truly,

Lois Fraser  
Assistant Deputy Minister

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**Ministry of  
Management Services**

Service BC  
Assistant Deputy Minister's Office

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## Ministry of Management Services

### Joint Solutions Procurement For the Enquiry BC Project

#### Government Contact:

All enquires related to this Joint Solutions Request for Proposal, **JSRFP# SATP-102** are to be directed in writing to the person set forth below, who will respond to all enquires if time permits. Information obtained from any other source is not official and should not be relied upon. Enquires and any responses will be recorded and may be distributed to all Proponents at the Province's option.

Huan Ngo  
Manager, Strategic Acquisitions  
Common Business Services, Solutions B.C.  
e-mail: [pcadmin@gems2.gov.bc.ca](mailto:pcadmin@gems2.gov.bc.ca)  
Facsimile: (250) 356-0846

#### Delivery of Proposals:

Proposals must **not** be sent by mail, facsimile or e-mail. Proposals and their envelopes should be clearly marked with the name and address of the Proponent, the JSRFP number, and the program title. Four (4) complete hard-copies and one electronic copy on diskette or CD must be delivered by hand or courier, and received **prior to 2:00 pm, Pacific Time on, November 24, 2004 at:**

Strategic Acquisition  
Ministry of Management Services  
102 - 548 Michigan Street  
Victoria, B.C., Canada  
Attention: Huan Ngo

#### Proponent Information Session

A Proponent information session will be held on:

November 3rd, 2004 at 1:30 pm  
Discovery Room  
3<sup>rd</sup> Floor, 563 Superior Street, Victoria BC

Please note that this meeting is an information session to announce the Enquiry BC Project. Attendance is optional and minutes will not be taken. Any questions related to the Project should be provided in writing according to the process described in section 1.2.2.4 Enquiries.

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# 1 JOINT SOLUTION REQUEST FOR PROPOSAL INTRODUCTION

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## 1.1 PURPOSE OF THE JSRFP AND JSP

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The purpose of this JSRFP is to identify Proponents with the optimum combination of the 3C's to be a Service Provider for the Ministry and to jointly create the Project Solution that will achieve the best business outcomes for the Project, and to establish opportunities for the future integration and operation of key government client service channels. This Project is one of the key initiatives for the Ministry.

The Joint Solution Procurement process is a multi-stage procurement process that can be illustrated by two major parts. The first part is the JSRFP process, designed to qualify Proponents on their capacity, capability, commitment and Written Solution. The second part of the JSP process involves three distinct phases consisting of a Joint Solution Definition Phase, a Due Diligence and Negotiation Phase and a Contract Negotiation Phase which will culminate in a longer term commercial arrangement being entered into with the Province.

The JSP process 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 will work closely with the Preferred Proponents, through the Joint Solution Definition Phase, in determining how to best meet the Ministry's business goals for the Project.

The Ministry is interested in receiving Proposals from qualified and experienced Proponents who are capable of providing contact centre services encompassing inbound enquiry reception, both by telephone and electronic mail (e-mail), telephone access to the on-line Multiple Address Change service, and expert referral services for the Enquiry BC Program.

The Ministry seeks to continue, at a minimum, to provide a comparable level of service, quality of service and range of services to those that have been delivered through the contracted operation of the Enquiry BC Contact Centre since July 1991. Furthermore, the Ministry wishes to select a Service Provider who has the capability, capacity and commitment to develop a modern, effective, and cost-effective contact centre which can offer its services to potential clients such as other ministries and the broader public sector. In addition, the successful Service Provider should have the 3C's required to potentially explore and develop channel integration opportunities (such as the integration and operation of voice, web, and face-to-face channels) jointly with the Ministry.

The mechanism to achieve the Ministry's desired business outcome is expected to be innovative and to reflect best-in-class corporate solutions. The Joint Solution Definition Phase allows for the refinement of a Proponent's Written Solution and an evolving approach for the Ministry's Service Channel Integration strategy. The deal elements that make up the Project will depend on the refinement process that will take place during the Joint Solution Definition Phase. A commercial arrangement resulting from the JSP process is expected to be five years in duration.

## 1.2 DEFINITIONS AND ADMINISTRATIVE REQUIREMENTS

### 1.2.1 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 Enquiry BC Project, and are the key attributes that will be assessed during the JSP process;
- b) “Additional Services” means those services that may be added to the Core Business as more particularly described in 2.1.4.2;
- c) “Business Alliance” means a mutually beneficial relationship between the Ministry and the Service Provider;
- d) “CITS” means Common IT Services, Solutions BC, a division of the Ministry of Management Services;
- e) “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;
- f) “Core Business” means the business of the Enquiry BC Contact Centre and includes activities such as, inbound enquiry reception, both by telephone and electronic mail (e-mail), telephone access to the on-line Multiple Address Change service and expert referral services;
- g) “Demand Transfer” means a situation where a caller already knows a government phone number and simply calls to request a toll-free transfer;
- h) “Due Diligence and 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;
- i) “Enquiry BC Contact Centre” means the location from where the Enquiry BC Service is provided;
- j) “Enquiry BC Program” means the program area within the Ministry of Management Services responsible for delivering the Province’s contact centre services;
- k) “Enquiry BC Service” means the contracted services for incoming call and e-mail referral services which are funded by the Enquiry BC Program;
- l) “Final Contract” means the written agreement or written agreements executed by the Province and the Successful Proponent resulting from completion of the Contract Negotiation Phase as more particularly described in section 2.2.3;
- m) “Government Telephone Directory System” means the database used for the online government directory found at [www.dir.gov.bc.ca](http://www.dir.gov.bc.ca);
- n) “ITIMS” means the CITS Information Technology Infrastructure Management System that tracks all numbers that are billed to the Province;
- o) “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;
- p) “Joint Solution Definition Phase” or “JSD 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;
- q) “JSD Solution” means a Preferred Proponent’s refined solution arrived at the conclusion of the JSD Phase and which is presented to the Province;
- r) “JSP” means the Joint Solution Procurement Process for the Project;
- s) “JSRFP” means this document;
- t) “Letter of Intent” means the letter of intent that will be entered into by the Successful Proponent prior to the Due Diligence and Negotiation Phase;
- u) “Ministry” means the Ministry of Management Services;
- v) “Multiple Address Change” means an electronic service that allows residents, who move within British Columbia, to change their address for their medical services plan, driver’s licence, and voters registration;
- w) “must”, or “mandatory” in respect of evaluation criteria means a requirement that must be met in order for a Proposal to receive consideration;
- x) “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;

- y) "Project" means the Enquiry BC Project as described in section 2.1 of this JSRFP;
- z) "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 or contemplates the use of subcontractors, then the Proponent will be the individual entity that acts as the lead entity responsible for the Proposal, as more particularly described in paragraph 1.2.2.25;
- aa) "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;
- bb) "Proposal" means the written submission required for the Proponent Qualification Phase;
- cc) "Province" means Her Majesty the Queen in Right of the Province of British Columbia as represented by the Ministry;
- dd) "Service BC" means a division of the Ministry as more particularly described in section 1.3.4;
- ee) "Service Channel Integration" means those services as described in section 2.1.4.3;
- ff) "Service Provider" means the Successful Proponent who enters into the Final Contract with the Province so as to achieve the Ministry's goals for the Project;
- gg) "should" or "desirable" in respect of evaluation criteria means a requirement having a significant degree of importance to the objectives of the JSRFP;
- hh) "Project Solution" means the overall solution that addresses the business objectives and desired outcomes of the Project and which is incorporated into the Final Contract;
- ii) "Subcontractors" mean entities that submit, or intend to submit, a joint Proposal with a Proponent or are retained by the Service Provider to perform certain services in respect of the Final Contract;
- jj) "Successful Proponent" means the Preferred Proponent who is invited by the Province to advance to the Due Diligence and Negotiation Phase and who signs a Letter of Intent; and
- kk) "Written Solution" means the solution submitted as part of a Proponent's Proposal in response to the JSRFP.

## 1.2.2. Joint Solution Request for Proposal Process – Proponent

## Qualification Phase

### 1.2.2.1 Terms of the Proponent Qualification Phase

This JSP will consist of four phases: the Proponent Qualification Phase, the Joint Solution Definition Phase, the Due Diligence and Negotiation Phase and the 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

During this stage Proponents will submit Proposals in accordance with the terms of this JSRFP. Each Proposal will be evaluated by the Province. Based upon the Province's evaluation of the Proposals, 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 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 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.

The responses to any enquiries regarding such additional information will be provided by e-mail, facsimile or courier 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.

**Huan Ngo**

E-mail: padmin@gems2.gov.bc.ca

Fax: (250) 356-0846

**1.2.2.5 Closing Date and Time**

Four complete hard copies of the Proposal and one electronic copy on diskette or CD must be delivered by hand or courier, and received **prior to 2:00 PM**, Pacific Time, on **November 24<sup>th</sup>, 2004** at:

Strategic Acquisitions  
Ministry of Management Services  
548 Michigan Street  
Victoria, British Columbia

**Attention: Huan Ngo**

Proposals must **not** be sent by mail, facsimile or e-mail. Proposals and their envelopes should be clearly marked with the name and address of the Proponent, the JSRFP number, and the program title.

**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 must ensure that its Proposal includes a letter or statement(s) substantially similar in content to the sample Proposal Covering Letter provided in 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**

The evaluation of Proposals will be undertaken by a committee formed by the Province, which 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 evaluation committee may be expanded by the Province in its sole discretion 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.

**1.2.2.12 Debriefing**

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 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 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 or 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 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 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.

**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. Proposals 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 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, during the Proponent Qualification Phase or discuss the Project described in this JSRFP with members of the public or the press, 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 described in this JSRFP 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 Phase of this JSP, re-commence a Phase of this 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, 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 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 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.

**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 C 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 and Negotiation Phase**

The Due Diligence and 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.

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## 1.3 MINISTRY OVERVIEW

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### 1.3.1 Ministry Responsibilities

The Ministry of Management Services general responsibilities are to:

- a. Provide its services to the public through call centres, the internet and in person at Government Agents offices;
- b. Lead the development of cross-government services on the internet and through other mechanisms to respond to the evolving needs of the public;
- c. Provide business and administrative services to government ministries and many other publicly-funded organizations; and
- d. Maintain responsibility for personal information and freedom of information legislation on behalf of government.

### 1.3.2 Vision, mission, values and culture

**The Ministry's vision is:**

To be a leader in connecting citizens, communities, and businesses with government services and valued partner in the delivery of innovative services to the public sector.

**The Ministry's mission is to:**

Champion the transformation of government services delivery to respond to the everyday needs of citizens, businesses and the public sector.

**The Ministry's values and culture are:**

- a. Client-focused in that services anticipate and respond to the needs of our customers and clients;
- b. Results-oriented in that performance is measured to ensure cost-effective business outcomes and value-added results;
- c. Innovative in that leading-edge, creative and integrated approaches are implemented;
- d. Collaborative in that active engagement with clients and stakeholders results in value-added solutions;
- e. Teamwork in that individuals and teams that achieve results and demonstrate creativity and calculated risk-taking are recognized. Individuals are treated with fairness, dignity and respect; and
- f. Transparent in that actions and communications are open and transparent.

It is expected that the Service Provider will deliver services consistent with the service parameters and metrics that the Ministry is expected to deliver to its clients.

### 1.3.3 Ministry's Goals and Objectives

The overarching strategic goals and their supporting objectives for the Ministry are:

- a. Cost-effective and efficient access to government services and information for citizens, businesses and the broader public sector. The objectives are to provide cost effective, high quality, multi-channel and integrated service delivery and to provide or expand existing high-speed, broadband internet access to BC;
- b. Cost-effective and efficient internal management services to core government and the broader public sector. The objectives are to reduce unit and overall shared services costs and to maintain a high level of customer satisfaction;
- c. Effective electronic service transformation initiatives. The objectives are to successfully deliver critical strategic information technology initiatives and to coordinate cross-government strategic planning and investment to transform electronic service delivery; and
- d. A customer-focused, results-oriented, innovative and knowledgeable team. The objectives are to have a skilled and motivated staff and a performance-focused workforce.

### 1.3.4 Service BC

Service BC is a division of the Ministry of Management Services. Information on Service BC is available at [http://www.msers.gov.bc.ca/sdi/Strategic\\_plans.htm](http://www.msers.gov.bc.ca/sdi/Strategic_plans.htm)

Service BC's mission is to promote service excellence and continuously improve customer access to information and services in British Columbia through service delivery, leadership and innovation in partnership with our clients.

An organizational chart for Service BC is provided in Appendix D.

As part of Service BC's service delivery mandate, the role of the Enquiry BC Program is to:

- a. provide equal access to current, reliable government information for all British Columbia residents;
- b. provide excellent service at the first point of contact with government and refer and/or transfer to the correct point in government;
- c. provide direct answers to common program enquiries;
- d. provide cost-effective methods of accessing information about or communicating with the government; and
- e. assist individuals in identifying the responsibilities of the various levels of government.

### 1.3.5 Ministry Commitments to the Project

The Ministry has assembled a core team of personnel 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.

The core team already assembled is comprised of senior level personnel with extensive experience in the management of major projects and in-depth understanding of the Enquiry BC Program. Further, key resources from the business and services side of the Ministry will be assigned full-time to the Project.

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## 2 DEFINING THE OPPORTUNITY

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### 2.1 PROJECT OVERVIEW, OBJECTIVES, AND SCOPE

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#### 2.1.1 Project Overview

The Ministry is interested in receiving Proposals from qualified and experienced Proponents who are capable of providing the Core Business services, Additional Services and potential future opportunities for Service Channel Integration.

Notwithstanding the above, Proponents are advised that due to the undefined nature of the Ministry's Service Channel Integration strategy and Additional Services needs, opportunities related to this area cannot be fully described in this JSRFP document.

Any Additional Services or services arising related to the Service Channel Integration will be subject to further exploration during the JSD Phase and may form part of the Final Contract (or which included subsequent contracts) that are negotiated by the parties during the JSD Phase or the term of the Final Contract.

#### 2.1.2 Project Objectives

The key business objectives of the Ministry relating to this Project are:

- a. To provide cost-effective, high quality, multi-channel, and integrated service delivery;
- b. To reduce unit and overall services costs; and
- c. To maintain a high level of customer satisfaction.

The Project is focused on selecting a Service Provider to deliver the Enquiry BC Service and to help the Ministry achieve its Service Channel Integration objectives over time.

#### 2.1.3 Project Scope

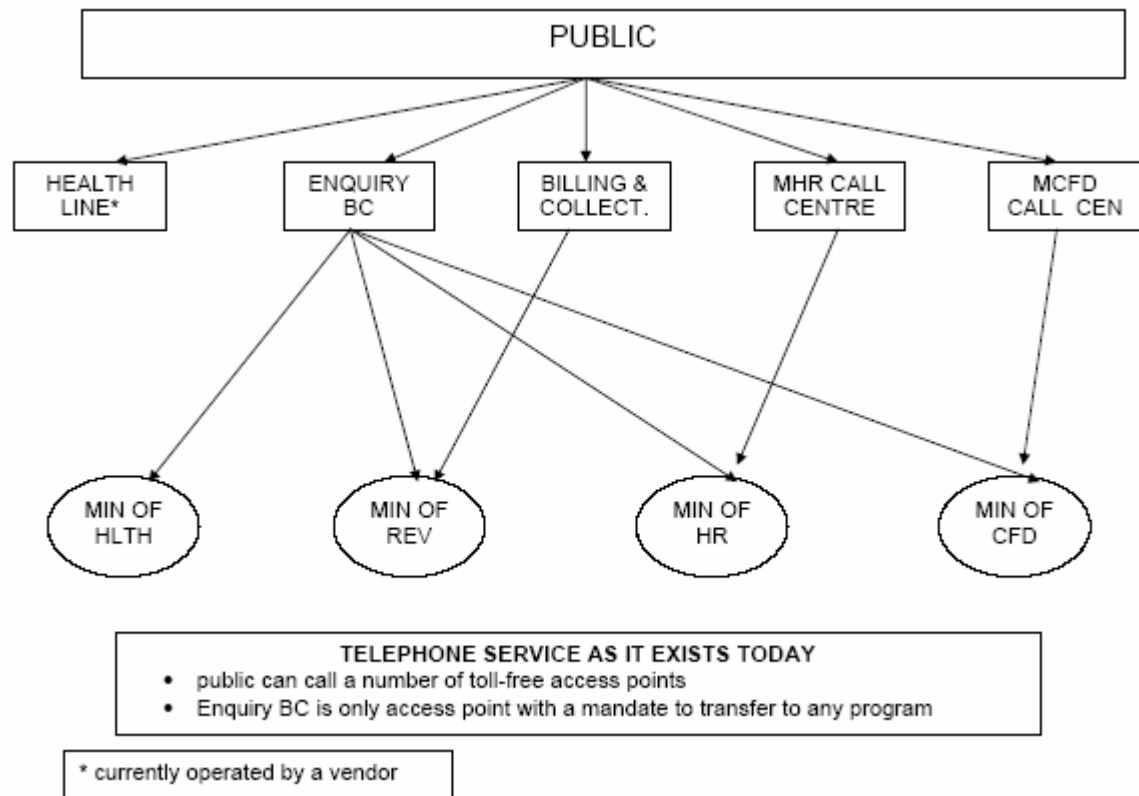
The scope of the Project is anticipated to be Core Business, Additional Services, and Service Channel Integration services. Proponents should note, however, that there is no guarantee that the Service Provider will be asked to provide any or all of the future Additional Services or Service Channel Integration services.

The Province intends to negotiate with the Preferred Proponents in the JSD Phase and the Service Provider for the Province for Additional Services and Service Channel Integration services, but the Province reserves the right to negotiate these services from other vendors.

#### 2.1.4.1 Enquiry BC Service Core Business

The Enquiry BC Contact Centre was established in July 1991 to provide British Columbia residents with toll-free telephone access to reliable, current information on provincial government programs and services on behalf of all provincial ministries, agencies boards and commissions. Since its inception, service has been provided by a vendor under contract to the Province. The Enquiry BC Contact Centre staff use a computerized, relational database to provide the following services to approximately 4,000 residents each weekday:

- a. Answer general government questions;
- b. Information referrals to government programs and staff;
- c. Toll-free call transfers for callers who would otherwise incur long distance charges;
- d. Demand Transfers to verified government phone numbers;
- e. Assist callers in identifying other levels of responsible government; and
- f. Complete, on behalf of British Columbia residents, the Multiple Address Change electronic form.



The Enquiry BC Service is the Province’s corporate telephone and e-mail access serving residents of British Columbia, including diverse Aboriginal communities. The Enquiry BC Service is the gateway to all of the Province’s programs, including access to health and social services. The Province’s staff interacts regularly in person with the Service Provider at the Enquiry BC Contact Centre, which may operate from one or more locations in British Columbia.

It is critical that the Service Provider commences service on April 1, 2005 at the location negotiated in the Final Contract. Proponents should propose a Written Solution that describes a credible implementation plan that satisfies this requirement.

#### 2.1.4.2 Additional Services

The Enquiry BC Service has to be able to adapt to the changing call centre needs of the Province. As part of the Core Business, the Service Provider will be required, from time to time, to perform Additional Services such as:

- a. participation in special projects that may disrupt the normal, day-to-day operations of the Enquiry BC Service. Special projects are high volume and brief (usually to a maximum of six months) in duration. Expanded database files and functions may be required to facilitate these projects. Examples of special projects are coverage of reception function during staffing reorganizations, receipt of mailing information for a poster campaign, and information provision during legislative changes within a government program; and
- b. operation of a customer help desk for the internal and external government portals. The help desk would be available for up to 24 hours each day, 7 days each week and 365/366 days each year. The help desk would provide technical support by telephone and on-line for services including, but not limited to, password resets, assistance with forms, registration and general information on the navigation of portals; and
- c. consolidation of the services of multiple contact centres including the Enquiry BC Service and other government contact centres currently distributed across the province. Today, government is operating several different contact centres serving a variety of needs and it is anticipated that considerable efficiencies could be gained from a consolidation of this activity and standardization on a smaller number of technical and business process platforms. It is anticipated that this consolidation would happen over time as opportunities arise.

#### **2.1.4.3 Future Opportunities for Service Channel Integration**

The Project includes an opportunity for the Service Provider to work with the Ministry in exploring and developing Service Channel Integration opportunities. In addition to the 3C's needed to deliver the requirements of the Enquiry BC Program, the JSP will assess a Proponent's overall capability and capacity to provide and implement a Service Channel Integration strategy including:

- a. the development of an integrated approach to channel management. This includes an integrated view of the customer, touch points, technology platforms, data access, and business processes; and
- b. the integration of voice, web and face-to-face channels to provide consistency of messaging and service levels to the government customers. Currently, the Province's voice, web and face-to-face channels are operated independently from each other with very little ability to provide integrated service. It is the Province's vision to offer an integrated experience for our customers, regardless of the channel they choose to access services. The Province needs to ensure consistency in terms of messaging and customer experience across the various channels, and in some cases, encourage customers towards specific channels when it makes sense to do so.

Proponents should note that the scope of the Project does not include removing Service Channel Integration services from current service contracts of the Province, or impact service contracts currently in negotiations with the Province.

## **2.2 ECONOMIC MODEL AND DEAL STRUCTURE**

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### **2.2.1 Deal Structure**

Proponents should understand the future business transformation opportunities (i.e. the Service Channel Integration aspects of the Project). The extent of the business transformation and the associated deal structure will depend on the solution possibilities arising out of the Joint Solution Definition Phase of the JSP process and on the decision to implement the Service Channel Integration strategy. In this case, the deal structure may evolve as these opportunities are identified.

The deal structure resulting from the successful Project Solution will be a key driving force for the success of the long-term commercial arrangement between the Service Provider and the Ministry. This deal structure will also address the immediate needs to implement the requirements for the Enquiry BC Service as well as any future related opportunities.

### **2.2.2 Economic Model and Pricing Structure**

The economic model and pricing structure for the Project will be evaluated based on overall value to the Province throughout the term for the Final Contract.

#### **2.2.2.1 Core Business Pricing Structure**

During the 2004/2005 fiscal year the maximum amount budgeted for the Enquiry BC Service contract is \$1.569 million, excluding telecommunication costs.

Proponents should note that the Enquiry BC Service budget for fiscal year 2005/2006 and subsequent two years is set at \$1.6 million annually, including telecommunication costs.

While the pricing structure proposed in a Proponent's Proposal has to accurately reflect the requirements of the Enquiry BC Service, the pricing may be subject to further refinements during the subsequent phases of the JSP.

#### **2.2.2.2 Additional Services and Service Channel Integration Economic Model**

Proponents are asked to describe past pricing models used on similar service delivery projects and to demonstrate to the Province their in-depth knowledge and experience in conceptualizing, designing, developing and operating economic and pricing models that are true to the spirit of the type of deal structures contemplated for this Project. This could range from a cost-plus model to a transaction based model or be a combination of several models depending upon the various business processes under consideration and the type of deal structure contemplated by the Proponent.

The allocation of risks and rewards between the Service Provider and the Province should be balanced for the commercial arrangement to be successful over the longer term.

From the context of the Project vision described in section 2.1.2, Proponents are asked to propose an economic model that addresses scenarios where Service Channel Integration opportunities may be assessed. The economic model proposed as part of



the Proponent's Proposal will be further explored during the JSD Phase.

### 2.2.3 Final Contract

The Final Contract for the Project will be for five years for the Core Business with a potential option for renewal for up to an additional three year period. Any Additional Services or services arising related to the Service Channel Integration may form part of the Final Contract (or which may include subsequent contracts) that are negotiated by the parties during the JSD Phase or the term of the Final Contract.

Proponents should note that the Final Contract may consist of more than one written agreement.

## 2.3 BUSINESS PROCESSES AND POLICY COMPLIANCE

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### 2.3.1 Business Process

Currently, Enquiry BC Service is contracted to Robertson Telecom Inc. in the Lower Mainland of British Columbia. The current contractual arrangement identifies areas of responsibility as follows.

Responsibilities of Robertson Telecom Inc include:

- a. management, administrative and service staff;
- b. accommodation of contact centre;
- c. furnishings in contact centre and relative office space;
- d. applications – development and maintenance;
- e. computer system – maintenance and upgrades; and
- f. mute boxes and headsets for staff.

The Ministry's responsibilities under the existing contract (and in the Final Contract arising as a result of this JSP) include the provision and maintenance of:

- a. telecommunication infrastructure, including applicable toll-free lines costs, as follows:
 

Access to the Enquiry BC Service is provided to all British Columbia residents through:

  - i. a local Vancouver number;
  - ii. a local Victoria number;
  - iii. an 800 number for elsewhere in British Columbia;
  - iv. an 800 Telephone Device for the Deaf (TTY) number; and
  - v. a local Vancouver Telephone Device for the Deaf (TTY) number.

Access to the Multiple Address Change is provided to all British Columbia residents through:

  - i. a local Vancouver number; and
  - ii. an 800 number for outside of Metro Vancouver.
- b. call distribution and management systems;
- c. data lines to manage e-mail handling; and
- d. a daily data file from the Government Telephone Directory System and a daily extract from the ITIMS database of all government lines currently billed.

Call volumes more than doubled in the first year of operation from 15,489 calls in July 1991 to 33,062 in July 1992. Call volumes continued to increase dramatically in the mid 1990's

|           |       |
|-----------|-------|
| 1993/1994 | + 41% |
| 1994/1995 | + 34% |
| 1995/1996 | + 33% |
| 1996/1997 | + 25% |

Call volumes reached a plateau in 1997/1998 and began decreasing in the subsequent years

|           |      |
|-----------|------|
| 1998/1999 | - 3% |
| 1999/2000 | - 4% |
| 2000/2001 | - 5% |
| 2001/2002 | - 4% |
| 2002/2003 | - 2% |
| 2003/2004 | - 2% |

Appendix E, F, and G provides further details on recent call volumes.

Effective June 2000 the Enquiry BC Service expanded to include responding to e-mail enquiries in a manner similar to how telephone enquiries are currently handled. E-mail responses include answers to basic questions, forwarding to program level e-mail addresses with notification to the sender, or a response detailing how the sender may contact the respective program areas if no e-mail access is available. E-Mail enquiries volumes are depicted in Appendix E.

The Enquiry BC Service is available from 7:30 am – 5:00 pm Pacific Time, Monday to Friday, excluding statutory holidays. Statutory holidays observed by the public service in British Columbia are:

- a. New Year' Day;
- b. Good Friday;
- c. Easter Monday;
- d. Victoria Day;
- e. Canada Day;
- f. British Columbia Day;
- g. Labour Day;
- h. Thanksgiving Day;
- i. Remembrance Day;
- j. Christmas Day; and
- k. Boxing Day.

While the operating time described above are expected to remain the same in the Final

Contract with the Service Provider, any extension to operating hours arising out of Additional Services will be further discussed during the JSD phase.

As part of the Core Business, the successful Service Provider will be required to make the service available in the English and in multiple languages.

## **2.3.2 Policy Compliance**

### **2.3.2.1 Privacy Policy**

Protection of privacy of personal information including health records, financial and other personal information must be ensured. Accordingly, compliance with the recently amended *Freedom of Information and Protection of Privacy Act* and guidelines is required.

Proponents are expected to fully recognize the impact, if any, of the US *Patriot Act* and changes in FOIPPA regarding personal information stored or accessed by the Service Provider as may be required pursuant to any Additional Services or Service Channel Integration services that may form part of the Final Contract.

All Proponents should have knowledge of the *Freedom of Information and Protection of Privacy Act* and related policies and guidelines of the Province.

Information on these policies is available at: <http://www.cio.gov.bc.ca>

Issues related to privacy will be assessed during the Joint Solution Definition Phase as described in section 4.2.4.

### **2.3.2.2 Labour Relations**

As the Enquiry BC Contact Centre is currently operated by Robertson Telecom Inc. and has no government employees, labour relations are not of immediate concern for the Ministry.

As future Service Channel Integration opportunities cannot be fully determined at the issuance of this JSRFP, any impact on government's employees will need to be determined at that later time.

### **2.3.2.3 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 Ministry may seek legislative approval to change or create the legislation, policies and/or regulations to effectively support the business case for the final Solution and facilitate execution of a Final Contract. Proponents are encouraged to identify potential legislative or policy changes early in the process to enable their review.

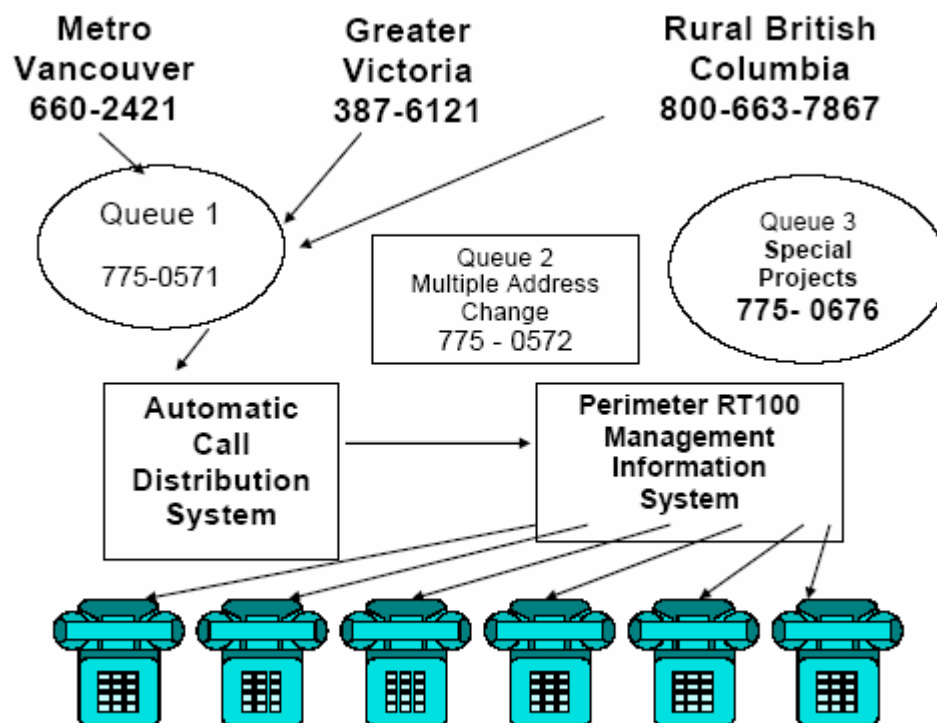
Issues related to government policy, legislation or other related regulations, if applicable, will be assessed during the Solution compliance activity of the Joint Solution Definition Phase as described in section 4.2.4. Knowledge of this area, and experience in this or other similar public jurisdictions, will add to the assessment of Proponent capability during the Proponent Qualification Phase.

## 2.4 TECHNOLOGY

The following call centre configuration reflects current practice. Proponents may propose alternative configurations to optimize service delivery and cost-effectiveness.

As of August 18, 2004, the following telecommunication infrastructure is used in the Enquiry BC Contact Centre:

- a. Centrex environment;
- b. 43 PDN with 29 ADN on Meridian 5212 sets, including 2 Voice mailboxes and 3 Listen Only mailboxes;
- c. MIS Perimeter (Perimeter Technology VU-ACD™/100 Management Information System) including access data link;
- d. Automated Call Distribution System;
- e. Fax Line;
- f. Modem Line;
- g. 5 toll-free access lines – 1 for the Enquiry BC Contact Centre; 1 for TTY service for the Enquiry BC Contact Centre; 1 for the Multiple Address Change; and 2 for special projects;
- h. Courtesy Response and Exchange Route for areas outside of toll-free access area;
- i. Trunk line between Victoria and Vancouver; and
- j. End-to-end 800 usage from point of the origin of a call through the Enquiry BC Contact Centre to program areas in provincial ministries, agencies, boards and commissions.



Currently 30 workstations with Meridian 5212 Centrex ACD sets with PDN and ADN lines

All telecommunications costs for the delivery of Enquiry BC Program services are paid for by the Ministry. The Ministry will continue to pay for all telecommunication costs, through arrangements with CITS, in this opportunity regardless of proposed call centre configuration.

In delivery of the current service, Robertson Telecom Inc. provides the following infrastructure:

- a. Relational Database and Maintenance;
- b. Call transfer verification;
- c. E-mail handling;
- d. Computer system; and
- e. Internet access.

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## 3 THE END-TO-END JSP PROCESS

### 3.1 OVERVIEW

The Joint Solution Procurement method is a multi-stage procurement process. The first phase is the JSRFP which is designed to short-list Proponents on their capacity, capability, commitment and Written Solution to be a Preferred Proponent. There follows three distinct phases consisting of a Joint Solution Definition Phase (where Solution refinement will occur), followed by a short Due Diligence and Negotiations Phase, ending with a Contract Negotiations Phase (where the Final Contract terms are framed, finalized and executed by the parties).

This JSP features an accelerated process which reduces the time needed to arrive at the Final Contract while still allowing for some co-development and collaboration between the short-listed Proponents and the Province's team.

### 3.2 TENTATIVE JSP SCHEDULE

| <b>Task Activity</b>  | <b>Anticipated Date</b> |
|---|-------------------------|
| JSRFP Closing date  | November 24, 2004       |
| Proposal evaluations completed and Preferred Proponents notified  | December 03, 2004       |
| Joint Solution Definition Phase initiated                         | December 08, 2004       |
| Joint Solution Definition sessions completed and JSD Presentation | January 19, 2005        |
| Letter of Intent signed and Successful Proponent announced        | January 26, 2005        |
| Due Diligence and Contract Negotiations completed                 | February 16, 2005       |
| Final Contract signed   | February 28, 2005       |
| <b>Implementation completed and operations started</b>            | <b>April 01, 2005</b>   |

### 3.3 KEY SUCCESS FACTORS

#### 3.3.1 Sharing of Risks and Rewards

In order for a long-term Business Alliance to exist, the Service Provider and Province 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 Written Solution, but also any opportunities for sharing risks and rewards. These opportunities for risks and rewards will be explored during the JSP.

#### 3.3.2 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 Proponent Qualification Phase**

All communication with the Province during the Proponent Qualification Phase should be referred to the government contact listed on the front page of this document.

### **3.2.3.3 Joint Solution Definition Phase**

The Ministry will facilitate access to staff capable of providing information during the Joint Solution Definition Phase.

### **3.2.3.4 Due Diligence and Negotiation Phase**

The Ministry will facilitate access to staff capable of providing information during the Due Diligence & Negotiation Phase of the JSP process.

### **3.2.3.5 Contract Negotiation Phase**

The Ministry will facilitate access to staff capable of providing information during the Contract Negotiation Phase of the JSP process. 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**

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### **4.1 PROPONENT QUALIFICATION PHASE - THE JSRFP PROCESS**

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#### **4.1.1 Release JSRFP & Evaluate Proposals**

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 a Proponent's 3C's and their Written Solution. 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 process transformation initiative.

#### **4.1.2 Preferred Proponents Selection**

Unlike conventional JSP projects where the Proponent Qualification Phases features a staged approach to identify Preferred Proponents, this accelerated JSP uses a Proponent's Proposal as a basis for the short-listing and identification of Preferred Proponents.

On the basis of the written evaluation process, the top two ranked short-listed Proponents will be deemed Preferred Proponents and will be invited to engage in the Joint Solution Definition Phase.

#### **4.1.3 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.

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## 4.2 JOINT SOLUTION DEFINITION PHASE

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The Joint Solution Definition Phase of the JSP process will require some investment on the part of the Ministry as well as the Preferred Proponents as the Written Solution is further refined and an approach to the Service Channel Integration requirements are developed.

Preferred Proponents are cautioned not to delay in signing the Joint Solution Definition Agreement as once one Preferred Proponent has satisfactorily executed the Joint Solution Definition Agreement the Joint Solution Definition Phase may begin immediately with that Preferred Proponent.

These activities will be performed jointly with the Ministry teams but independently with each Preferred Proponent. The primary deliverable coming out of the Joint Solution Definition Phase will be the JSD Solution that describes (a) the deal structure, (b) an approach and implementation plan that describes the services delivery strategy for the Enquiry BC business processes and technology, (c) a description of how the JSD Solution is compliant with policy and other government regulations and agreements and (d) a pricing structure for the Core Business as well as an economic model for Additional Services and the future Service Channel Integration opportunity.

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

### 4.2.1 Defining the Solution

This period of activity consists of three iterative one-week JSD Solution definition cycles designed to refine the business and technical aspects of the Project, as well as the economic and pricing model. The Preferred Proponents will be working independently from each other, with the Ministry Project team, in jointly formulating the JSD Solution to the Project objectives.

The iterative series of meetings is envisioned as two half-day sessions per week per Preferred Proponent for three weeks. Activities during the first week will focus on Enquiry BC Service operations as the current opportunity. Activities during the second week will focus on Service Channel Integration opportunities. Activities during the third week will focus on integrating solutions for both Core Business and future opportunities into a Preferred Proponent's JSD Solution.

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

### 4.2.2 Comply with Public Sector Service Standards

Once the economic and pricing model and business processes/ technology aspects of the JSD Solution are formulated, the Preferred Proponents and the Ministry will need to assess the approach for compliance with public-sector service delivery requirements.

### 4.2.3 Framing the Solution

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

A period of synthesis will take place on the JSD Solution 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 JSD Solution. Details of the evaluation process will be more particularly set out in the Joint Solution Definition Agreement.

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 and Negotiation Phase.

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## 4.3 DUE DILIGENCE AND NEGOTIATION PHASE

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The Due Diligence and 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 JSD Solution developed during the previous Joint Solution Definition Phase is validated against any assumptions.

There are five (5) key tasks that describe how the Due Diligence and 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 JSD Solution 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 Project Solution formulated in the previous Joint Solution Definition Phase. This includes detailed verification of information used to design the Project 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 Project Solution and an 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 JSD Solution.

The need for this step in the process will be determined with the Successful Proponent.

### 4.3.3 Improvement Opportunities

As a result of the Due Diligence and Negotiation 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.

### 4.3.4 Finalize Service Provider Model

An important activity of this Phase is finalization of the proposed Service Provider structure 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 Service Provider structure will operate. This activity has to be completed prior to commencing the Contract Negotiation Phase of the JSP process.

### 4.3.5 Confirm Project Solution Approach

On conclusion of this phase, the JSD Solution developed in the previous JSD phase will be finalized and the necessary elements completed for incorporation into the Final Contract.

## 4.4 CONTRACT NEGOTIATION PHASE

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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 Project Solution as well as developing the Final Contract so as to establish a long-term commercial arrangement and Business Alliance with the Service Provider. 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 Project Solution 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 is to ensure uninterrupted delivery of the Enquiry BC Service.

### 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 Service Provider 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 Service Provider is to be approved by the Ministry before release.

## 4.5 DECISION POINTS

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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 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

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### 4.6.1 Proposal Format Guidelines

Proponents are asked to assist the evaluation committee by structuring their Proposals in a consistent manner. The suggested Proposal format is described below.

- a. JSRFP Cover Page
- b. Signed letter in substantially similar format to that of Appendix A
- c. Table of Contents
- d. Executive Summary
- e. Checklist of Mandatory Requirements
- f. Body of the Proposal (see section 4.7 for questions that should be responded to)
- g. Corporate References
- h. Appendices

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## 4.6.2 JSRFP Evaluation Criteria

As stated in section 4.1.2, selection of the Preferred Proponents is based on evaluation of the Proposals. The evaluation will proceed as follows:

### 4.6.2.1 Mandatory Criteria

All Proposals will be evaluated according to the mandatory criteria described below. Failure to satisfy any one or more of the mandatory criteria will result with disqualification from the JSP process.

| <b>Mandatory Criteria</b> |   |
|---------------------------|---|
| <b>1</b>                  | The Proposal must be received at the closing location before the specified closing time or it will not be accepted. |
| <b>2</b>                  | The Proposal must be in English and must not be sent by mail, facsimile or e-mail.                                  |
| <b>3</b>                  | Proposals must include a statement that the Proponent is not in receivership or insolvent.                          |
| <b>4</b>                  | Proposals must include a signed letter in substantially similar format to that of Appendix A                        |

### 4.6.2.2 Desirable Criteria

Proposals that have satisfied the mandatory criteria will be evaluated based on the desirable criteria listed in the following table. Based on evaluation of the written Proposals, the Ministry will qualify two top ranking Proponents to proceed to the Joint Solution Definition Phase. Information provided in Proposals may be referenced throughout the JSP process.

| <b>Desirable Criteria</b>  | <b>Minimum Score</b> | <b>Maximum Score</b> |
|--|----------------------|----------------------|
| Capability <ul style="list-style-type: none"> <li>- Company profile</li> <li>- Demonstrated experience to deliver call centre services of similar size and scope to the Core Business</li> <li>- Demonstrated experience in Service Channel Integration</li> </ul>   |                      | 10                   |
| Capacity and Commitment <ul style="list-style-type: none"> <li>- Corporate and financial capacity to engage in the Project</li> <li>- Demonstrated capacity to engage in longer term commercial arrangements</li> <li>- Demonstrated capacity to deliver call centre services of similar size and scope to the Core Business</li> <li>- Commitment to the business goals and objectives of the Ministry</li> </ul> |                      | 10                   |

| Desirable Criteria  | Minimum Score | Maximum Score |
|---|---------------|---------------|
| <p>Deal Structure</p> <ul style="list-style-type: none"> <li>- Proposed deal structure for Core Business</li> <li>- Proposed deal structure for Additional Services</li> <li>- Proposed deal structure for future Service Channel Integration opportunities</li> <li>- Challenges and key success factors impacting proposed Service Channel Integration opportunities deal structure</li> </ul>  |               | 5             |
| <p>Core Business Pricing Structure</p> <ul style="list-style-type: none"> <li>- Proposed pricing structure for Core Business (should include detail pricing and maximum annual amount charged to the Ministry) note: search for Core Business in this JSRFP</li> </ul>  |               | 15            |
| <p>Economic Model</p> <ul style="list-style-type: none"> <li>- Proposed economic model for future Service Channel Integration opportunities (will not include detailed pricing but the overall pricing approach )</li> <li>- Challenges and key success factors impacting proposed Service Channel Integration opportunities economic model</li> <li>- Proposed pricing model for Additional Services (see section 2.1.4.1)</li> </ul>  |               | 5             |
| <p>Business processes solution</p> <ul style="list-style-type: none"> <li>- Proposed solution to the Core Business requirements addressing information collection, database management, e-mail handling, Demand Transfers, disaster recovery, and operations</li> <li>- Proposed solution to Core Business requirements addressing human resource planning, recruiting, training, retention, and management</li> <li>- Proposed transition plan for implementation and delivery of the Core Business</li> <li>- Proposed solution to service delivery in English with multilingual capability</li> <li>- Compliance with all applicable legislation, policies, procedures, and standards including FOIPPA</li> <li>- Measures to mitigate the impacts of the US <i>Patriot Act</i> regarding personal information stored or accessed by the Service Provider as may be required pursuant to any Additional Services or Service Channel Integration</li> </ul> | 21            | 35            |

| Desirable Criteria  | Minimum Score | Maximum Score |
|---|---------------|---------------|
| services that may form part of the Final Contract.  |               |               |
| Proposed technology solution <ul style="list-style-type: none"> <li>- Describing technologies to deliver Core Business requirements including all hardware, software, network, internet access, and related technologies</li> <li>- Describing technology standards, plans, upgrade, refresh, implementation and all related planning information</li> <li>- Addressing compliance with government policy and standards on technology</li> <li>- Addressing seamless technology transition and migration at the beginning and end of the Final Contract</li> <li>- Addressing intellectual property and licensing of the technology solution</li> </ul> | 9             | 15            |
| Performance and reporting solution <ul style="list-style-type: none"> <li>- Performance standards, service levels, incentives, consequences, and continuous improvement mechanisms</li> <li>- Data collection, statistical analysis, quantitative reports, qualitative feedback, and other reporting mechanisms</li> </ul>  | 3             | 5             |

On completion of the evaluation process, the scores will be tallied and Proponents ranked. The top two short-listed Proponents will be deemed the Preferred Proponents and invited to the Joint Solution Definition Phase of the JSP. The remaining Proponents will be advised of their ranking and offered debriefing sessions that will be held after the Successful Proponent has been announced. Section 4.7 provides response guidelines for Proposals. As part of this accelerated JSP, the Ministry expects that the Project Solution will reflect a refinement of the Written Solution provided by the Successful Proponent and should not be substantially different from the original Proposal.

#### 4.6.3.5 Joint Solution Definition Phase Decision Criteria

Once the Preferred Proponents have been identified, a series of Joint Solution Definition activities will take place that culminates in each Preferred Proponent refining their Written Solution and presenting their JSD Solution to the Ministry's evaluation committee. The Ministry will evaluate the Preferred Proponent's JSD Solution and determine which Preferred Proponent will be deemed the Successful Proponent and thereby invited to sign a Letter of Intent with the Ministry.

The following evaluation criteria outline the manner in which the evaluation committee will evaluate the Preferred Proponent's JSD Solution.



|          | <b>Decision Criteria</b>                      |
|----------|---|
| <b>1</b> | Business processes & policy compliance        |
| <b>2</b> | Economic and pricing model and deal structure |
| <b>3</b> | Technology                                    |
| <b>4</b> | Performance and reporting                     |

The decision criteria and governing process will be communicated to the Preferred Proponents upon the signing of the Joint Solution Definition Agreement, which must be signed prior to the commencement of the Joint Solution Definition Phase.

On completion of the evaluation, the Ministry will announce the Successful Proponent and the Due Diligence and Negotiation Phase will commence as described in section 4.3.

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## 4.7 PROPONENT RESPONSE GUIDELINES

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Proponents should provide as much detail as necessary in order to demonstrate expertise or to meet requirements 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. Proponents should carefully review the JSRFP definitions prior to Proposal preparation.

Proponents should note the accelerated nature of this JSP and be sure to provide a detailed Written Solution addressing the business and technology requirement of the Core Business.

### 4.7.1 References

Proponents should provide both corporate and project references that support the statements made in the examples provided for the evaluation criteria. The Ministry, at its sole option, may do further reference checks by contacting other corporate and project references in addition to the ones provided by the Proponent.

### 4.7.2 Capability

#### **Company profile**

Proponents should include a profile that details background information on the Proponent, including the year established, area of recognized expertise in the market place; and an overview of the Proponent's corporate ownership and structure.

#### **Demonstrated experience to deliver call centre services of similar size and scope to the Core Business**

Proponents should describe its expertise in call centre related business processes and systems. Information should demonstrate how this experience relates to the Project and why the experience is evidence of the Proponent's capability to understand, manage and operate required aspects of the Project. The Ministry is seeking to ensure that Proponents adequately understand Enquiry BC Program's business, objective, scope, size challenges and key success factor. An effective way to develop and demonstrate a clear understanding of the Enquiry BC Program's business is to provide a high level business plan for the Core Business. Such a plan should include, but is not limited to, high level volume projections, activities projections, location planning, staff planning, equipment planning, and other pertinent information as seen fit by the Proponent.

#### **Demonstrated experience in Service Channel Integration**

Proponents should describe its expertise in Service Channel Integration methods, processes, and technologies.

### 4.7.3 Capacity and Commitment

#### **Corporate and financial capacity to engage in the Project**

The Province will require that the Service Provider put up the initial funding to initiate the Project. Proponents are asked to demonstrate (i.e. not explain how but show where and when) it has engaged as a lead vendor, with substantial financial obligation, on a similar project that involved the transformation and/or outsourcing of business processes and technology. A public or private sector call centre example would be preferred.

### **Demonstrated capacity to engage in longer term commercial arrangements**

The Project is important to the Province as the Enquiry BC Service is often the first contact point for the public to access provincial programs and services. The Ministry expects that the Project Solution will evolve over the years. Proponents are required to demonstrate, using past or current examples, of projects of similar scope and prospective change where the Proponent was able to successfully engage in a longer term (five years) commercial arrangement.

### **Demonstrated capacity to deliver call centre services of similar size and scope to the Core Business**

Proponents are required to demonstrate, using past or current project examples, where they had successfully managed business processes, technology, and delivery of services similar to the Enquiry BC Service.

### **Commitment to the business goals and objectives of the Ministry**

Success in meeting or exceeding the business outcomes of the Project is a basic success factor for the Ministry. Proponents should describe how they would ensure that the Ministry's desired business outcomes will be met and demonstrate, using past or current examples, where their innovativeness, ingenuity and commitment to their client resulted in service success.

## **4.7.4 Deal Structure**

### **Proposed deal structure for Core Business**

Proponents should describe a deal structure appropriate for the Core Business requirements that reflect the operational parameters of the Enquiry BC Service.

### **Proposed deal structure for Additional Services**

In addition to the deal structure that addresses the Core Business requirements of the Project, Proponents should include an appropriate deal structure that will facilitate the implementation of future Additional Services.

### **Proposed deal structure for future Service Channel Integration opportunities**

In addition to the deal structure that addresses the Core Business requirements of the Project, Proponents should include an appropriate deal structure that will facilitate the implementation of future Service Channel Integration opportunities.

### **Challenges and key success factors impacting the proposed Service Channel Integration opportunities deal structure**

Proponents should describe the types and challenges associated with deal structures they have established and the methods used to ensure that a mutually beneficial commercial arrangement was established and service successfully delivered.

## **4.7.5 Core Business pricing structure**

### **Proposed pricing structure for Core Business**

Proposals should include a detailed pricing for the Core Business. The pricing model should include the maximum amount to be charged to the Ministry annually and be supported by a detailed list of services, technology, equipment and fees.

Proponents should note that the Enquiry BC Service budget for fiscal year 2005/2006 and subsequent two years is set at \$1.6 million annually including telecommunication costs. Additional Services are excluded from this budget.

Based on the Ministry's current estimate for telecommunication infrastructure, the annual cost should a call centre be located in the Greater Vancouver Regional District, or the Capital Regional District, is \$300,000. The Ministry's telecommunications estimate for a call centre located elsewhere in BC is \$400,000.

The proposed pricing structure in this Proposal for the Core Business should be within the allocated budget when estimated telecommunications cost included. The Service Provider will not be penalized by future increases in telecommunication costs incurred by the Enquiry BC Program's arrangements with CITS in subsequent years.

#### **4.7.6 Economic model**

##### **Proposed economic model for future Service Channel Integration opportunities**

Proponents should formulate and include in their Proposals an economic model that may be used to assess the viability of future Service Channel Integration opportunities. Proponents should note that this economic model will be subject to further exploration during the JSD Phase.

##### **Challenges and key success factors impacting the proposed Service Channel Integration economic model**

Each economic model has its own advantages and disadvantages, risks and rewards, challenges and opportunities. Proposals should include a detail discussion of the challenges and key success factors associated with the proposed economic model and address how these challenges will be overcome.

##### **Proposed pricing model for Additional Services**

Proponents should propose a pricing model that may be used as a basis for formulating costs associated with Additional Services similar to those describe in this document.

#### **4.7.7 Business processes solution**

##### **Proposed solution to the Core Business requirements addressing information collection, database management, e-mail handling, Demand Transfers, disaster recovery, and operations**

The Ministry is seeking to ensure that Proponent's business processes are adequately planned for successful delivery of the services at start up and throughout the relationship. Please describe your proposed business process for the Enquiry BC Service taking into account the requirements below which reflect current practices. Proponents are encouraged to suggest innovative business processes which effectively deliver the services in an efficient manner.

- a. Information collection: program and contact information are collected and updated on an on-going basis by the service provider to ensure up-to-date and accurate information is available for immediate response to public enquiries.
- b. Database management: the Service Provider organizes, manages, secures, backs up, retrieves, reports and presents the collected information in a format which enables operators to quickly search and find appropriate information to immediately respond to public enquiries. The Public Affair Bureau ensures that all province-wide press releases are faxed to the Enquiry BC Contact Centre on a priority basis.
- c. E-mail handling: the Service Provider responds to e-mail enquiries, maintains electronic records, and provides security for the records. The Ministry provides an Enquiry BC Service e-mail address which receives incoming enquiries and forwards

- them to the Service Provider's secured e-mail server.
- d. Demand Transfer: using its own technology, the Service Provider verifies that Demand Transfers are to a valid government phone number. The Ministry provides a daily data file from the Government Telephone Directory System and a daily extract from the ITIMS database of all telephone lines currently billed to the Province.
  - e. Disaster recovery: the Service Provider has a disaster recovery plan for continued operation of the Enquiry BC Service.

#### **Proposed solution to Core Business requirements addressing human resource planning, recruiting, training, retention and management**

The Ministry is seeking to ensure that Proponents are able to provide a knowledgeable, well-trained, courteous, and responsive staff and management. Please describe your human resource management policy, strategy, and plans as appropriate for the Enquiry BC Service.

#### **Proposed transition plan for implementation and delivery of the Core Business**

The Ministry is seeking to ensure uninterrupted services are provided by the Enquiry BC Service during transition period at the beginning and end of the Final Contract term.

Most importantly, it is critical that the successful Service Provider be able to begin service delivery on April 1<sup>st</sup>, 2005. Proponents are required to include a credible transition plan that addresses the Ministry's go-live date and support the plan with a risk mitigation strategy.

#### **Proposed solution to service delivery in English with multilingual capability**

Since English is the working language of the Province, all staff delivering the Enquiry BC Service must be proficient in the English language. The Enquiry BC Service has provided multi-lingual service as a value added service since the call centre opened in 1991. Proponents should include in their Proposals a strategy to provide multilingual service. The current demand for multilingual service is depicted in Appendix H.

#### **Compliance with all applicable legislation, policies, procedures, and standards including FOIPPA**

The Ministry is seeking to ensure that the Preferred Proponents understand applicable legislation, policies, procedures, and standards which impact the Project's operating environment. Proponents should identify relevant issues, implications, and the proposed method to ensure compliance.

#### **Measures to mitigate the impacts of the US *Patriot Act* regarding personal information stored or access by the Service Provider as may be required pursuant to any Additional Services or Service Channel Integration services that may form part of the Final Contract**

The Ministry is seeking to ensure that Proponents understand the implications of the US *Patriot Act* on the protection of personal information held by the Province. Proponents should identify relevant issues, implications, and the proposed method to ensure compliance for Additional Services and future Service Channel Integration opportunities.

### **4.7.8 Proposed technology solution**

#### **Describe technologies to deliver Core Business requirements including all hardware, software, network, internet access, and related technologies**

Proponents should propose a technology solution for the delivery of the Core Business requirements. All technology and related services proposed by Proponents must be

included as part of the proposed pricing structure.

Proponents should note that telecommunication services related to Enquiry BC Contact Centre must be provided by CITS and are not in scope of this Project.

#### **Describe technology standards, plans, upgrade, refresh, implementation and all related planning information**

As technology evolves overtime and technological innovation results in increased productivity, the Ministry is seeking to ensure that up-to-date technology will be applied to support the Enquiry BC Service throughout the term of the Final Contract. Proponents should describe a plan to upgrade proposed technology to newer and better standards which may become available in the future. The objective is to ensure optimum effectiveness and efficiency for the Enquiry BC Service.

#### **Address compliance with government policy and standards on technology**

The Ministry seeks to ensure that the Proponents adequately plan to comply with changing government standards and policies on technology.

#### **Address seamless technology transition and migration at the beginning and end of the Final Contract**

The Ministry is seeking to ensure seamless continuation of services provided to the public during transition periods specifically at the beginning and the end of the Final Contract. Proponents should describe a plan for technology transitioning during these critical periods.

#### **Address intellectual property and licensing of the technology solution**

The Ministry is seeking to ensure continuous access to critical applications used for the Enquiry BC Service. Proponents should describe proposed terms regarding intellectual property and licensing for the applications used to deliver services for the Enquiry BC Service.

### **4.7.9 Performance and reporting solution**

#### **Performance standards, service levels, incentives, consequences, and continuous improvement mechanisms**

The Ministry is seeking to ensure consistent and high performance standards throughout the duration of the Final Contract. In addition, there should be appropriate consequences for non-performance as well as incentives for continuous improvement in service delivery.

The current performance standards, monitored by the manager of the Enquiry BC Program, include the following factors: number of rings, length of call, accuracy of information and referral, communication skills, and attitude of staff members.

The Management Information System currently in use, by the Ministry, is the Perimeter Technology VU-ACD™/100 which provides daily and monthly statistical reports on: incoming calls, speed of answer, average call duration, time of day, calls abandoned, individual staff statistics and number of calls transferred.

The Service Provider is expected to maintain, at a minimum, the following performance standards:

- a. During peak hours, 85% of calls will be answered within 20 seconds;
- b. The Enquiry BC Service is expected to handle a minimum of 95% of calls offered;
- c. The error rate of factual material disseminated by the Enquiry BC Service staff

- utilizing the relational database will at no time exceed 0.5%;
- d. 75% of e-mails received prior to 2:00 pm, will be answered during the same business day; and
  - e. A user satisfaction rating of 95%. Satisfaction is determined by surveys conducted by BC Stats using a standardized measurement.

Proponents should propose performance standards, incentives, consequences and plans for continuous improvement throughout the Final Contract.

**Data collection, statistical analysis, quantitative reports, qualitative feedback, and other reporting mechanisms**

The Ministry is seeking to ensure that, at the minimum, the following information including narratives will be collected and reported to the Province on a monthly and annual basis:

- a. Total number of enquiries broken down into enquiry method (e.g.: calls, e-mails, faxes);
- b. Average number of enquires per day (broken down into enquiry method);
- c. Busiest day and number of enquiries that day;
- d. Top ten programs by enquiry volume;
- e. Geographic distribution of calls;
- f. Number of enquiries handled in languages other than English;
- g. Types of calls - information, referrals, Demand Transfers, lost calls, level of government;
- h. Average call length;
- i. Abandoned calls and
- j. Enquiries handled by ministry, broken down by enquiry method and program area within ministry.

Other ad hoc reports may also be required from time to time. Proponents are encouraged to propose additional or alternative methods of accessing, analyzing, and retrieving comparable information for management and reporting purposes. All reports and related services proposed by Proponents must be included as part of the proposed pricing structure.

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## APPENDICES

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### APPENDIX A - SAMPLE LETTER

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Letterhead or Proponent's name and address

Date

Ministry name and address

Dear Sir/Madam

**Subject:** Joint Solutions Procurement Request for Proposal Name  
JSRFP Number (the “JSRFP”)  
List any amendment nos. 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: \_\_\_\_\_

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



**APPENDIX B - RECEIPT CONFIRMATION FORM**

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**Enquiry BC Project  
Closing Date: November 15, 2004  
Joint Solutions Request for Proposal No. SATP-102  
Ministry of Management Services**

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

**Attention: Huan Ngo**  
Mail: 102 – 548 Michigan Street  
Victoria, B.C.  
Or: Fax #: (250) 356-0846  
E-mail: SATP@gems6.gov.bc.ca

**Company:** \_\_\_\_\_

**Street address:** \_\_\_\_\_

**City/Province:** \_\_\_\_\_ **Postal Code:** \_\_\_\_\_

**Mailing address if different:** \_\_\_\_\_

\_\_\_\_\_

**Phone number:** \_\_\_\_\_ **Fax number:** \_\_\_\_\_

**Contact person:** \_\_\_\_\_

**email:** \_\_\_\_\_

We will be sending \_\_\_\_\_ representatives to the Proponent Information Session. (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:** \_\_\_\_\_

**Company:** \_\_\_\_\_

## APPENDIX C – JOINT SOLUTION DEFINITION AGREEMENT

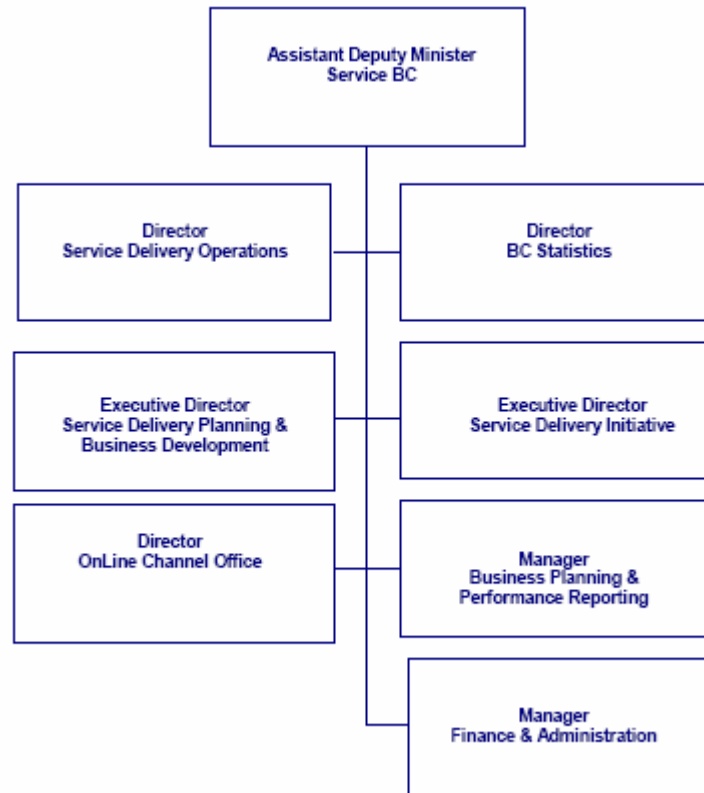
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The Preferred Proponents must enter into a Joint Solution Definition Agreement with the Province that will govern the actions of the Province and the Preferred Proponents during the Joint Solution Definition Phase, the Due Diligence and Negotiation 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 relations hip, survival and execution.

## APPENDIX D – SERVICE BC ORGANIZATIONAL CHART

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## APPENDIX E – ENQUIRY VOLUME HISTORY

| <b>1999/2000</b> | <b>Apr</b> | <b>May</b> | <b>Jun</b> | <b>Jul</b> | <b>Aug</b> | <b>Sep</b> | <b>Oct</b> | <b>Nov</b> | <b>Dec</b> | <b>Jan</b> | <b>Feb</b> | <b>Mar</b> | <b>Total</b> |
|------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|--------------|
| Calls            | 95,463     | 97,915     | 110,175    | 96,690     | 94,580     | 97,320     | 91,074     | 94,404     | 72,514     | 91,332     | 94,187     | 103,880    | 1,139,534    |
| Av. Daily        | 4,773      | 4,896      | 5,008      | 4,604      | 4,504      | 4,634      | 4,554      | 4,495      | 3,453      | 4,567      | 4,485      | 4,517      | 4,541        |
| <b>2000/2001</b> | <b>Apr</b> | <b>May</b> | <b>Jun</b> | <b>Jul</b> | <b>Aug</b> | <b>Sep</b> | <b>Oct</b> | <b>Nov</b> | <b>Dec</b> | <b>Jan</b> | <b>Feb</b> | <b>Mar</b> | <b>Total</b> |
| Calls            | 81,853     | 100,983    | 101,668    | 87,828     | 92,389     | 85,378     | 90,699     | 87,029     | 65,224     | 94,911     | 90,746     | 99,486     | 1,078,194    |
| E-mails          | -          | -          | 22         | 145        | 126        | 152        | 132        | 145        | 88         | 243        | 222        | 206        | 1,481        |
| Total            | 81,853     | 100,983    | 101,690    | 87,973     | 92,515     | 85,530     | 90,831     | 87,174     | 65,312     | 95,154     | 90,968     | 99,692     | 1,079,675    |
| Av. Daily        | 4,547      | 4,590      | 4,621      | 4,398      | 4,206      | 4,277      | 4,325      | 4,151      | 3,438      | 4,325      | 4,548      | 4,531      | 4,330        |
| <b>2001/2002</b> | <b>Apr</b> | <b>May</b> | <b>Jun</b> | <b>Jul</b> | <b>Aug</b> | <b>Sep</b> | <b>Oct</b> | <b>Nov</b> | <b>Dec</b> | <b>Jan</b> | <b>Feb</b> | <b>Mar</b> | <b>Total</b> |
| Calls            | 84,512     | 93,511     | 97,013     | 96,701     | 93,465     | 79,620     | 92,395     | 83,263     | 60,389     | 89,831     | 80,544     | 82,802     | 1,034,046    |
| E-mails          | 256        | 396        | 508        | 498        | 397        | 297        | 460        | 463        | 344        | 683        | 590        | 582        | 5,474        |
| Total            | 84,768     | 93,907     | 97,521     | 97,199     | 93,862     | 79,917     | 92,855     | 83,726     | 60,733     | 90,514     | 8,134      | 83,384     | 966,520      |
| Av. Daily        | 4,461      | 4,269      | 4,644      | 4,629      | 4,266      | 4,207      | 4,221      | 3,987      | 3,196      | 4,114      | 4,057      | 4,169      | 4,185        |
| <b>2002/2003</b> | <b>Apr</b> | <b>May</b> | <b>Jun</b> | <b>Jul</b> | <b>Aug</b> | <b>Sep</b> | <b>Oct</b> | <b>Nov</b> | <b>Dec</b> | <b>Jan</b> | <b>Feb</b> | <b>Mar</b> | <b>Total</b> |
| Calls            | 90,675     | 89,850     | 86,285     | 92,890     | 81,389     | 81,125     | 89,615     | 80,593     | 64,530     | 89,351     | 82,637     | 86,013     | 1,014,953    |
| E-mails          | 602        | 653        | 487        | 530        | 505        | 486        | 526        | 459        | 474        | 802        | 678        | 976        | 7,178        |
| Total            | 91,277     | 90,503     | 86,772     | 93,420     | 81,894     | 81,611     | 90,141     | 81,052     | 65,004     | 90,153     | 83,315     | 86,989     | 1,022,131    |
| Av. Daily        | 4,347      | 4,114      | 4,338      | 4,246      | 3,900      | 4,080      | 4,097      | 4,053      | 3,251      | 4,097      | 4,166      | 4,142      | 4,069        |
| <b>2003/2004</b> | <b>Apr</b> | <b>May</b> | <b>Jun</b> | <b>Jul</b> | <b>Aug</b> | <b>Sep</b> | <b>Oct</b> | <b>Nov</b> | <b>Dec</b> | <b>Jan</b> | <b>Feb</b> | <b>Mar</b> | <b>Total</b> |
| Calls            | 85,426     | 86,918     | 89,538     | 89,808     | 77,844     | 84,128     | 84,887     | 71,135     | 65,409     | 80,724     | 77,942     | 93,402     | 987,161      |
| E-mails          | 2,159      | 1,366      | 833        | 781        | 769        | 856        | 1,098      | 984        | 775        | 1,044      | 1,043      | 1,244      | 12,952       |
| Total            | 87,585     | 88,284     | 90,371     | 90,589     | 78,613     | 84,984     | 85,985     | 72,119     | 66,184     | 81,768     | 78,985     | 94,646     | 1,000,113    |
| Av. Daily        | 4,379      | 4,204      | 4,304      | 4,118      | 3,930      | 4,047      | 3,909      | 3,796      | 3,152      | 3,894      | 3,949      | 4,115      | 3,983        |

\*e-mail handling began June 2000

## APPENDIX F – WEEKLY CALL VOLUME DISTRIBUTION (HEAVY MONTH)

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| <b>1/2 Hr Period</b> | <b>Monday</b> | <b>Tuesday</b> | <b>Wednesday</b> | <b>Thursday</b> | <b>Friday</b> | <b>Average</b> |
|----------------------|---------------|----------------|------------------|-----------------|---------------|----------------|
|                      | June 14, 2004 | June 15, 2004  | June 16, 2004    | June 17, 2004   | June 18, 2004 |                |
| 0730 - 0800          | 38            | 33             | 27               | 26              | 27            | 30             |
| 0800 - 0830          | 124           | 124            | 108              | 88              | 94            | 107            |
| 0830 - 0900          | 276           | 240            | 227              | 195             | 256           | 269            |
| 0900 - 0930          | 341           | 291            | 305              | 256             | 255           | 290            |
| 0930 - 1000          | 363           | 301            | 311              | 290             | 274           | 308            |
| 1000 - 1030          | 334           | 301            | 286              | 262             | 294           | 295            |
| 1030 - 1100          | 348           | 305            | 291              | 266             | 260           | 294            |
| 1100 - 1130          | 303           | 281            | 285              | 260             | 261           | 278            |
| 1130 - 1200          | 303           | 241            | 270              | 267             | 217           | 258            |
| 1200 - 1230          | 246           | 210            | 193              | 183             | 176           | 201            |
| 1230 - 1300          | 214           | 197            | 171              | 182             | 152           | 187            |
| 1300 - 1330          | 288           | 261            | 264              | 233             | 201           | 249            |
| 1330 - 1400          | 334           | 243            | 248              | 247             | 239           | 262            |
| 1400 - 1430          | 295           | 257            | 250              | 265             | 217           | 257            |
| 1430 - 1500          | 280           | 250            | 242              | 216             | 196           | 237            |
| 1500 - 1530          | 270           | 204            | 200              | 238             | 201           | 223            |
| 1530 - 1600          | 261           | 230            | 207              | 192             | 198           | 218            |
| 1600 - 1630          | 215           | 171            | 170              | 143             | 110           | 162            |
| 1630 - 1700          | 98            | 57             | 52               | 74              | 53            | 67             |
| 0730 - 1700          | 4951          | 4175           | 4107             | 3883            | 3681          | 4159           |

Numbers reflect calls to the main Enquiry BC numbers.

Numbers do not include calls to Multiple Address Change or Additional Services queues.

Average for June 2004 was 64 calls per day on Multiple Address Change lines.

## APPENDIX G – WEEKLY CALL VOLUME DISTRIBUTION (LIGHT MONTH)

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| 1/2 Hr Period | Monday<br>Dec. 15, 2003 | Tuesday<br>Dec. 16, 2003 | Wednesday<br>Dec. 17, 2003 | Thursday<br>Dec. 18, 2003 | Friday<br>Dec. 19, 2003 | Average |
|---------------|-------------------------|--------------------------|----------------------------|---------------------------|-------------------------|---------|
| 0730 - 0800   | 21                      | 24                       | 19                         | 16                        | 13                      | 19      |
| 0800 - 0830   | 86                      | 65                       | 73                         | 70                        | 62                      | 71      |
| 0830 - 0900   | 214                     | 180                      | 205                        | 167                       | 155                     | 184     |
| 0900 - 0930   | 234                     | 217                      | 224                        | 242                       | 177                     | 219     |
| 0930 - 1000   | 255                     | 230                      | 239                        | 223                       | 202                     | 230     |
| 1000 - 1030   | 259                     | 259                      | 245                        | 193                       | 206                     | 232     |
| 1030 - 1100   | 273                     | 238                      | 214                        | 253                       | 217                     | 239     |
| 1100 - 1130   | 275                     | 250                      | 205                        | 206                       | 214                     | 230     |
| 1130 - 1200   | 219                     | 221                      | 195                        | 161                       | 188                     | 197     |
| 1200 - 1230   | 193                     | 119                      | 136                        | 150                       | 147                     | 149     |
| 1230 - 1300   | 182                     | 181                      | 184                        | 132                       | 131                     | 162     |
| 1300 - 1330   | 232                     | 215                      | 215                        | 190                       | 176                     | 206     |
| 1330 - 1400   | 210                     | 223                      | 228                        | 198                       | 186                     | 209     |
| 1400 - 1430   | 242                     | 227                      | 194                        | 163                       | 167                     | 199     |
| 1430 - 1500   | 212                     | 221                      | 201                        | 167                       | 208                     | 202     |
| 1500 - 1530   | 231                     | 217                      | 201                        | 210                       | 149                     | 202     |
| 1530 - 1600   | 200                     | 186                      | 161                        | 182                       | 152                     | 176     |
| 1600 - 1630   | 156                     | 139                      | 124                        | 123                       | 93                      | 127     |
| 1630 - 1700   | 53                      | 57                       | 30                         | 41                        | 34                      | 43      |
| 0800 - 1700   | 3747                    | 3469                     | 3293                       | 3087                      | 2877                    | 3296    |

Numbers reflect calls to the main Enquiry BC numbers.

Numbers do not include calls to Multiple Address Change or Additional Services queues.

Average for Dec. 2002 was 54 calls per day on Multiple Address Change lines.

## APPENDIX H – DEMAND FOR MULTILINGUAL SERVICE

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### Top 10 Mother Tongues in the BC Population (excluding English)

1. Chinese – Mandarin, Cantonese, and other dialects
2. Punjabi
3. Korean
4. Vietnamese
5. Persian
6. French
7. Spanish
8. Tagalog – Philippines
9. Hindi
10. Japanese

(Source BC Stats – Census 2001)

### Multi-Lingual Service Request Experience at Enquiry BC Contact Centre

From April 2003 through March 2004 multi-lingual service was requested by 141 callers.

Multi-lingual service represents less than .01% of the total calls handled.

- |            |  |
|------------|--|
| 1. French  | = 61.0%                                      |
| 2. Chinese | = 24.8% (Mandarin 11.3% and Cantonese 13.5%) |
| 3. Punjabi | = 11.4%                                      |
| 4. Spanish | = 1.4%                                       |
| 5. Tagalog | = 1.4%                                       |