

From: [Pridmore, Kerry MTIC:EX](#)
To: [Sadler, Bobbi MTIC:EX](#)
Cc: [McDonald, Seanna MTIC:EX](#); [Furtado, Angelina MTIC:EX](#); [Gordon, Audra MTIC:EX](#)
Subject: Action Items: DM briefing BC Bid Replacement
Date: Tuesday, November 7, 2017 2:26:41 PM

Hi Bobbi – enclosed is a list of items from the meeting with Jill on BC Bid yesterday.

We are working to bring a complete package of these items for Nov 13th at latest, if not earlier.

Next steps:

- Jill Kot to discuss with Lori Wannamaker the expansion of potential scope with Lori Wannamaker (DM, Finance)
- Brief of BC Bid NRFP to DM Committee (Kerry/Bobbi, Nov 14)
- Brief Minister Sims (Jill Kot, Nov 20 or 27)

Action items:

- Review email regarding discussions with Lori Wannamaker (Jill Kot)
- Pull current wording out of NRFP regarding out of scope modules, provide suggested amended language to potentially include additional modules (Audra)
- Pull back IBN for Minister Sims (Audra, Nov 7)
- Provide draft presentation deck for DM and Minister Jinny Sims for briefing (Audra, Nov 8)
- Check for regional search capability in BC Bid Replacement requirements (Audra)
- s.13

Audra Gordon | Project Director, Procurement Transformation | Technology, Innovation, Procurement and Supply
p: 250-952-9338 | c: 250-415-5282 | e: Audra.Gordon@gov.bc.ca
Address: 3rd Floor, 563 Superior Street, Victoria BC, V8V 1T7



Ministry of
Citizens' Services

BC Bid Briefing

Prepared for Jill Kot
Deputy Minister, Ministry of Citizens' Services
November 6, 2017

Overview

Next Steps: Confirm alignment with mandate and implementation approach prior to release of competitive documents

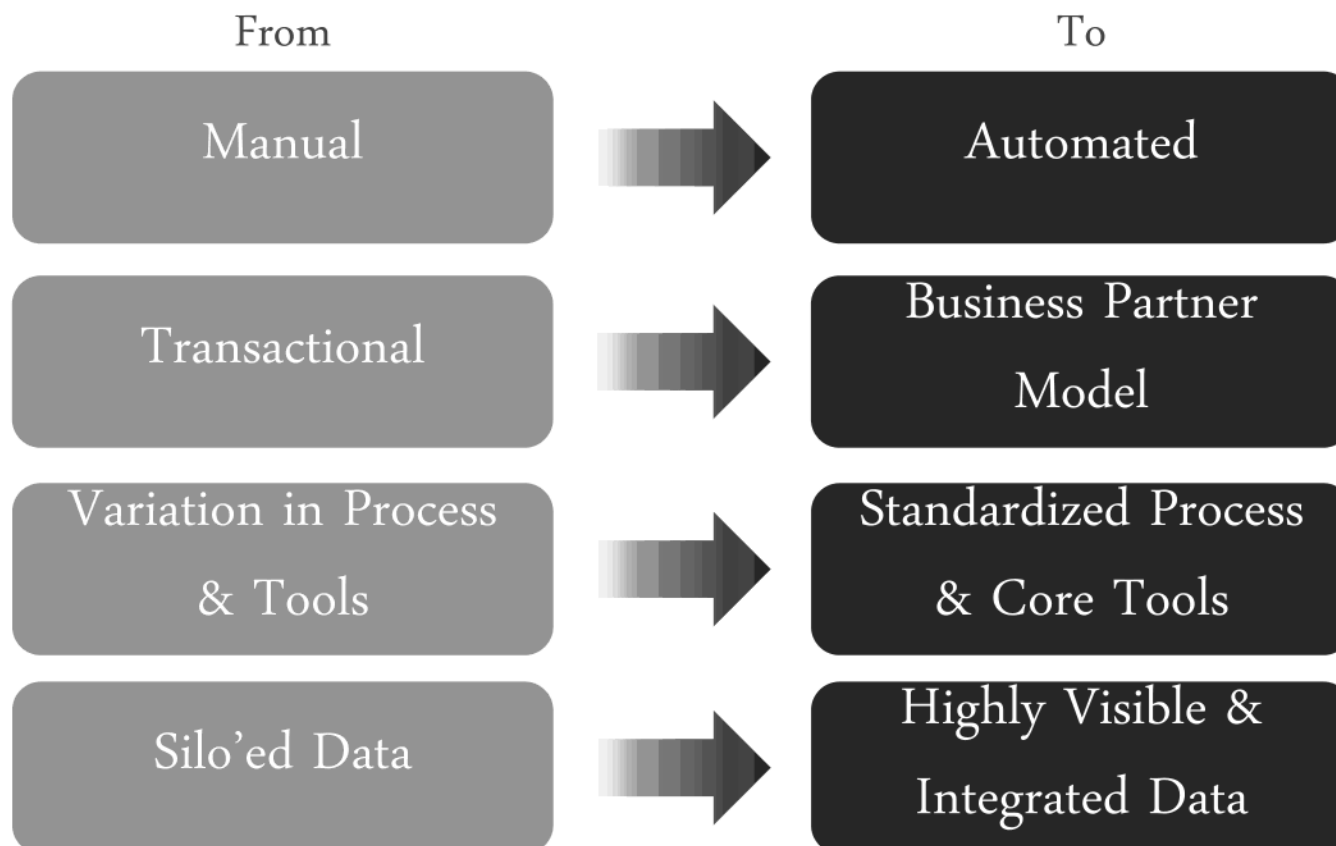
- Mandate Alignment
- Change Management and Implementation
- Anticipated Timing
- Resourcing
- Budget
- Term

Mandate - Alignment

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- Value and Length of IT Contracts
- Procurement works better for companies that hire locally and have a local supply chain

Future State





Change Management

- Automated
 - Corporate Process Mapping
 - BPS Survey and long-term engagement
 - Training
- Standardization
 - Corporate templates
 - Commodity Taxonomy
 - Configuration
- Business Partner Model
 - BC Bid Resources
 - Procurement Community of Practice
 - Vendor engagement
- Visible & Integrated Data
 - Enablement
 - Integrations
 - Supplier Master Data

Implementation

- Integration Plan
- Final Change Management Plan
- Public Portal
- OneStop – Business Registry
- Supplier Portal
- Sourcing
 - Commodity codes – UNSPSC
 - Supplier Portal
 - Public Portal
- Spend Analytics
 - Spend Data
 - Spend Reports

Estimated Timelines

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Resourcing

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Budget

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BC Bid (\$millions)			
Legal			
Contracted Services			
Procurement chg-backs			
Recoveries & cost savings			
Pressure			
Costs covered from existing budget (Salary & Ben.)			
Total Cost			
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Recommendation

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Rationale

From: [Furtado, Angelina MTIC:EX](#)
To: [Taylor, Diane Ruth MTIC:EX](#)
Cc: [Sadler, Bobbi MTIC:EX](#); [Pridmore, Kerry MTIC:EX](#); [Gordon, Audra MTIC:EX](#)
Subject: FW: Nov 6th: DM Briefing BC Bid Replacement
Date: Monday, November 6, 2017 10:14:39 AM
Attachments: [BC Bid DM Briefing 102317.pptx](#)
[NRFP Walkthrough.docx](#)

Hi Diane,

Please find attached the materials for today's 3:00 meeting with Jill.

Thank you,

Angie Furtado

Phone: 778.698.2332

Mobile 250.216.7511

From: Pridmore, Kerry MTIC:EX
Sent: Thursday, November 2, 2017 4:07 PM
To: Sadler, Bobbi MTIC:EX
Cc: McDonald, Seanna MTIC:EX; Furtado, Angelina MTIC:EX; Gordon, Audra MTIC:EX
Subject: Nov 6th: DM Briefing BC Bid Replacement

Hi Bobbi:

The enclosed materials have been updated based on our conversation this morning.

If you approve of these, they can be submitted to DM for our meeting Nov 6th.

Many thanks

Kerry Pridmore | Executive Director |
Procurement Transformation Branch
Ministry of Citizen Services |
Cell: 250-507-1485 |

Province of British Columbia

BC Bid Replacement Negotiated Request for Proposals

Briefing for Jill Kot, Deputy Minister

Audra Gordon, Project Director
11/6/2017

1 Procurement Charter

Approvals:

Executive Lead, Procurement Transformation Branch
Brooke Hayes

Executive Program Lead, Procurement Services Branch
Mark Ross

A/Executive Sponsor, Procurement and Supply, Citizens' Services
Pelle Agerup

Executive Lead, Corporate Services for the Natural Resources Sector
Wes Boyd

Executive Lead, Small Business Regulatory Reform
Christine Little

Executive Lead, Children and Family Development
Reg Bawa

Executive Lead, Transportation
Vicki Willow

2 NRFP Review Summary

Review Cycle	Name(s)	Date
Pre-Review Contributions (specific sections)	OCIO: Identity Management, Architecture and Standards CITZ: Information Management Branch FIN: Corporate Accounting Services Industry Expert: Nitor Partners Limited Canada Service BC: BC Registry Services Baseline Terms: Jenifer Chilcott, Farris, Vaughan, Wills & Murphy, LLP.	March 2016 – August 2017
Legal Review (High level)	LSB: Mia Clement, Natasha Grof,	May 31 – June 15
Business Review 1	BC Bid Working Group ¹	May 31 – June 16
Legal Review 1	LSB: Mia Clement, Natasha Grof Farris: Jenifer Chilcott	July 13 – Jul 26
Risk Management Branch Review	Melissa McCabe	August 1 – Aug 8
Business Review 2	BC Bid Working Group ² JTT: International Trade OCIO: Architecture and Standards FIN: Risk Management Branch CITZ: Intellectual Property Program	August 1 – 14 August 24 – Pending August 29 – September 11 August 29 – September 11 August 29 – September 7
Legal 2	LSB: Mia Clement, Natasha Grof	September 12 – 27
Legal 3	LSB: Mia Clement, Natasha Grof Farris: Jenifer Chilcott	October 10 – 13

1. **BC Bid Working Group distribution***: Brooke Hayes CITZ; Jenny L Pleice TRAN; Vicki Willow TRAN; Kailee MTIC Douglas; Jason P Taylor CITZ; Adam D McKinnon MTIC; Brenda Brophy CSNR; Jared Warren FIN; Matthew Boddy MTIC; Karen Flood MTIC; Tanyann Belaney FIN; Trevor Parus (Nitor); Caitlin M Parks MTIC; Jennifer D Polichek FIN; Nicole Lavoie M FIN; Murray G Smith MTIC; Neil F Rich MCF

*All names in red font contributed comments to the draft

2. **BC Bid Working Group distribution***: Tanyann Belaney FIN; Matthew Boddy MTIC; Brenda Brophy CSNR; Kailee Douglas MTIC; Brooke Hayes MTIC; Nicole Lavoie M FIN; Jenny L Pleice TRAN; Neil F Rich MCF; Jared Warren FIN; Adam D McKinnon MTIC; Vicki Willow TRAN; Jennifer D Polichek FIN; Jason P Taylor MTIC

*All names in red font contributed comments to the drafts

3 Walkthrough

1. Referring to the solution as an “Application”: the Sourcing and Spend Analytics Application.
2. NRFP Terms:
 - a. Non-binding (revocable)
 - b. Pricing is non-binding but substantially altering or misrepresenting pricing may result in impacts to the ranking of a proponent.
 - c. Discretion to waive administrative deficiencies (section 2.16) but not substantive evaluated elements of a proposal.
 - d. Due diligence on past performance; proposal information, and financials.
 - e. Declaration of Interest form – includes consent form and NDA; access to VDR.
 - f. Contract Award is subject to approvals, including Treasury Board, if necessary.
3. Still under the Procurement Transformation Initiative [Confirm].
4. Scope
 - a. Application:
 - i. Sourcing: Ministry and BPS Users
 1. Public Portal
 - a. May be in place or require a customized build – included in the pricing sheet
 - b. Includes spend analytics available to the public
 - c. Currently no specifics on the spend analytics reports that will be provided, therefore details to be elaborated upon during implementation planning (is a pricing risk to the proponents)
 2. Supplier Portal
 - ii. Services
 - i. Implementation:
 1. Data migration, Architecture, Release, Organizational change management and training
 - ii. System Integration
 - iii. Operational Support
 - iv. Transition Out: Application transition and support transition
 - v. **Additional On-Demand Services** - Various services that are necessary to maintain, enhance, integrate, support, and/or transition the Application or supplement the resources and expertise of the Province on a project basis, may be requested. On-Demand services are not included in the pricing of the Application and Services, and may be quoted when requested as a fixed-priced or time-and-materials basis, based upon the Rate Card established in the Contract. On-Demand Services may be requested directly by the Province or by a BPS ordering via its own agreement.

Examples of On-Demand Services include:

- a. **Project management services** – working with the Province to plan future Application configurations, minor enhancements, or major integrations;
 - b. **Technology planning services** – working with the Province and/or BPS to assess the impact of new technology and/or services on the application and services provided;
 - c. **Business process review** – working with the Province or BPS to determine impacts of the Solution on their organization and business process, or opportunities for improving over-all effectiveness in the related business areas;
 - d. **Support planning and integration service** – working with the Province or BPS to plan and implement effective help desk support for the Application, and integrate it with their other support functions;
 - e. **Application enhancements** – as requested by the Province to meet specific business needs related to the Application functionality; and
 - f. **Ad hoc report development.**
- 5. Future Scope: CETA Portal
- 6. Potential Scope – related services added to the SaaS application
 - a. Future Integrations
 - b. BPS Agreements for administration privileges and/or integration
 - c. Data migration
- 7. Out of Scope:
 - a. The Province’s established **Corporate Financial System** provides ERP **functionality** and is therefore out of scope.
 - b. **contract management and supplier performance modules**, which are two of four of the standard modules provided to support the entire procurement lifecycle, are not included in the scope.
 - c. Any **changes to the CFS required to integrate with the Solution** will be performed by the Application Management Service provider contracted by the Ministry of Finance via BC Bid opportunity number 7248.
- 8. Process, Proposal structure, and Evaluation Plan:
 - 1. Pre-submission and Rectification
 - a. Vendor Reference Check
 - 2. Proposal:
 - a. Screening Criteria
 - b. Weighted Evaluation:
 - i. Application:
 - 1. Highly Desirable
 - 2. Desirable

- ii. Corporate Requirements
- iii. Services:
 - 1. Implementation
 - 2. System Integration
 - 3. Operational Support
 - 4. Transition-out
- iv. Price:
 - 1. Annual Subscription Fees
 - 2. Service Fees (Implementation)
 - 3. Rate Card
- c. Demonstrations (up to 4 top ranked)
 - i. Functional
 - ii. User Experience
 - 1. Flexibility
 - 2. Shortcuts
 - 3. Ease of Use and UI
 - iii. Support for workflow
- d. Selection
 - i. Written – 100 pts
 - ii. Demonstration – 40 pts
- e. Reference Checks
- f. Negotiations
 - i. Focus on Contract terms:
 - 1. Baseline terms provided – non-negotiable items and negotiable items identified.
 - 2. Province may incorporate the Contractor's subscription agreement as a schedule.

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Withheld pursuant to/removed as

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From: [McKinnon, Adam D MTIC:EX](#)
To: [Gordon, Audra MTIC:EX](#)
Subject: RE: information on original BC Bid contract
Date: Wednesday, November 8, 2017 10:50:09 AM

Hi Audra

Please feel free to reach out to LSB.

Thanks

Adam

From: Gordon, Audra MTIC:EX
Sent: Wednesday, November 8, 2017 10:50 AM
To: McKinnon, Adam D MTIC:EX
Subject: RE: information on original BC Bid contract

Thanks Adam.

Another place to look is with LSB – they should have copies of the contract(s) with OGMA on file. I can ask Mia/Natasha, unless you have a more direct one to any of the solicitors that worked on those files.

Audra

From: McKinnon, Adam D MTIC:EX
Sent: Wednesday, November 8, 2017 9:57 AM
To: Gordon, Audra MTIC:EX
Subject: RE: information on original BC Bid contract

Hi Audra

I've gone through the original BC Bid project file but unfortunately all of those records are as of 2002/03 – nothing on record regarding the original BC Bid contract. Given that these records go back 21 years now, it's entirely possible that no electronic copy was made and the contract was stored via hardcopy only. It may also have been retained beyond the usual 7-year retention cycle due to the legal action attached to the file. I will follow-up with Kerri to see if we can track something down.

Thanks

Adam

From: Gordon, Audra MTIC:EX
Sent: Tuesday, November 7, 2017 4:39 PM
To: McKinnon, Adam D MTIC:EX
Subject: information on original BC Bid contract

Hi Adam,

We briefed Jill Kot yesterday on the BC Bid Replacement project. She asked me to find out what the original term (plus any extensions) for the first BC Bid contract. I believe this would be from 1995/6. Do you have any information? I do know it was upgraded by OGMA in 2002. I would expect that the initial contract perhaps ran from 1995 to 2002, or perhaps the Province only procured the software and implementation with a shorter term? Hoping you can help!

Thanks,

Audra Gordon | Project Director, Procurement Transformation | Procurement and Supply
p: 250-952-9338 | c: 250-415-5282 | e: Audra.Gordon@gov.bc.ca
Address: 3rd Floor, 563 Superior Street, Victoria BC, V8V 1T7

From: [McKinnon, Adam D MTIC:EX](#)
To: [Hornett, Kerri E MTIC:EX](#)
Cc: [Gordon, Audra MTIC:EX](#)
Subject: RE: information on original BC Bid contract
Date: Wednesday, November 8, 2017 11:07:51 AM

Okay no problem, we're also checking with legal Services Branch so no further action needed.

From: Hornett, Kerri E MTIC:EX
Sent: Wednesday, November 8, 2017 11:05 AM
To: McKinnon, Adam D MTIC:EX
Subject: RE: information on original BC Bid contract

Unfortunately that was on the old system and it is gone now. I can go through the binders and see if anything pops up with the title BCBid. But because we filed everything under the tender numbers, we may be out of luck.

From: McKinnon, Adam D MTIC:EX
Sent: Wednesday, November 8, 2017 10:58 AM
To: Hornett, Kerri E MTIC:EX
Subject: RE: information on original BC Bid contract

Would we have any documents filed specific to the contract around 1999?

From: Hornett, Kerri E MTIC:EX
Sent: Wednesday, November 8, 2017 10:57 AM
To: McKinnon, Adam D MTIC:EX
Subject: RE: information on original BC Bid contract

Ruth-Ann and I were talking it and our office was located out at the airport in 95/96 and BCBid wasn't created until we had moved to 3350 Douglas street about 1999

From: McKinnon, Adam D MTIC:EX
Sent: Wednesday, November 8, 2017 9:59 AM
To: Hornett, Kerri E MTIC:EX
Subject: FW: information on original BC Bid contract

Hi Kerri

As follow-up to the note below, is there any way to confirm whether a hardcopy record of a contract file for the creation of BC Bid exists? The contract would have been established in 1995/96, and may have been retained due to legal action associated with that file over 2002-2012.

Thanks
Adam

From: McKinnon, Adam D MTIC:EX
Sent: Wednesday, November 8, 2017 9:57 AM
To: Gordon, Audra MTIC:EX
Subject: RE: information on original BC Bid contract

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Thanks,

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DUPLICATE

From: [Kishimoto, Mike J MTIC:EX](#)
To: [Gordon, Audra MTIC:EX](#)
Subject: RE: information on original BC Bid contract
Date: Wednesday, November 8, 2017 11:29:23 AM

No I don't. I did that procurement over 15 years ago. Best to look for the Ogma files. Everything would be there. We used to have an archive server where all documents were kept (pre-BC Bid), when BC Bid was an in-house product.

Mike

From: Gordon, Audra MTIC:EX
Sent: Wednesday, November 8, 2017 11:14 AM
To: Kishimoto, Mike J MTIC:EX
Subject: FW: information on original BC Bid contract
Importance: High

Hi Mike,

Would you happen to have this information available, or point me to it on the old SATP LAN?

Thanks,
Audra

From: McKinnon, Adam D MTIC:EX
Sent: Wednesday, November 8, 2017 11:10 AM
To: Webster, Ruth-Ann MTIC:EX
Cc: Gordon, Audra MTIC:EX
Subject: RE: information on original BC Bid contract

Thanks!

From: Webster, Ruth-Ann MTIC:EX
Sent: Wednesday, November 8, 2017 11:07 AM
To: McKinnon, Adam D MTIC:EX
Subject: RE: information on original BC Bid contract

Mike Kishimoto might have something

Ruth-Ann Webster | Procurement Specialist |
p: 250-387-7327 |

From: Keenan, Ralph C MTIC:EX
Sent: Wednesday, November 8, 2017 10:55 AM
To: Hornett, Kerri E MTIC:EX; McKinnon, Adam D MTIC:EX
Cc: Webster, Ruth-Ann MTIC:EX
Subject: RE: information on original BC Bid contract

Sorry. I have nothing I can add. I got rid of any info I had long ago.

From: Hornett, Kerri E MTIC:EX
Sent: Wednesday, November 8, 2017 10:39 AM
To: McKinnon, Adam D MTIC:EX
Cc: Keenan, Ralph C MTIC:EX; Webster, Ruth-Ann MTIC:EX
Subject: RE: information on original BC Bid contract

Hi Adam

I'll see what I can come up with, maybe Ralph or Ruth-Ann would be able to help with this as well.

From: McKinnon, Adam D MTIC:EX
Sent: Wednesday, November 8, 2017 9:59 AM
To: Hornett, Kerri E MTIC:EX
Subject: FW: information on original BC Bid contract

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p: 250-952-9338 | c: 250-415-5282 | e: Audra.Gordon@gov.bc.ca
Address: 3rd Floor, 563 Superior Street, Victoria BC, V8V 1T7

From: [Pridmore, Kerry MTIC:EX](#)
To: [Gordon, Audra MTIC:EX](#)
Subject: RE: Summary notes from DM briefing BC Bid Replacement
Date: Tuesday, November 7, 2017 2:23:52 PM

Thanks – made some edits below.

From: Gordon, Audra MTIC:EX
Sent: Tuesday, November 7, 2017 11:04 AM
To: Pridmore, Kerry MTIC:EX
Subject: Summary notes from DM briefing BC Bid Replacement

Next steps:

- Jill Kot to discuss with Lori Wannamaker the expansion of potential scope with Lori Wannamaker (DM, Finance)
- Brief of BC Bid NRFP to DM Committee (Kerry/Bobbi, Nov 14)
- Brief Minister Sims (Jill Kot, Nov 20 or 27)

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