



RETURN BIDS TO:

IRCC.BidsReceiving-Receptiondessoumissions.IRCC@cic.gc.ca

Attn: Manon Delorme

FOR ELECTRONIC BIDS:

The electronic mailbox is equipped to send an automatic reply to all messages received. If you do not receive an automatic response, please contact the Contracting Authority to ensure your bid was received. Please note that it is the bidder's sole responsibility to ensure that all bids submitted are received in their entirety by Citizenship and Immigration Canada by the closing date and time indicated in this RFP.

IMPORTANT NOTICE TO SUPPLIERS

The Government Electronic Tendering Service on buyandsell.gc.ca/tenders will be the sole authoritative source for Government of Canada tenders that are subject to trade agreements or subject to departmental policies that require public advertising of tenders.

REQUEST FOR PROPOSAL

Proposal To: Citizenship and Immigration Canada

We hereby offer to sell to Her Majesty the Queen in right of Canada, in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the goods, services, and construction listed herein and on any attached sheets at the price(s) set out thereof.

Instructions : See Herein

Instructions: Voir aux présentes

**Issuing Office – Bureau de distribution
Citizenship and Immigration Canada
Procurement and Contracting Services
70 Crémazie
Gatineau, Québec K1A 1L1**

Title – Sujet	
Helpdesk Service Tool	
Solicitation No. – N° de l'invitation	Date
CIC - 155593	October 19 th , 2023
Solicitation Closes – L'invitation prend fin at – à	Time Zone Fuseau horaire
3:00 PM on – October 30 th , 2023	UTC-4 EDT
F.O.B. - F.A.B.	
Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Inquiries to: - Adresser toutes questions à :	
IRCC.BidsReceiving-Receptiondessoumissions.IRCC@cic.gc.ca	
Telephone No. – N° de téléphone :	
Destination – of Goods, Services, and Construction:	
Destination – des biens, services et construction :	
See Herein	
Delivery required - Livraison exigée	
See Herein	
Vendor/firm Name and address	
Raison sociale et adresse du fournisseur/de l'entrepreneur	
Facsimile No. – N° de télécopieur	
Telephone No. – N° de téléphone	
Name and title of person authorized to sign on behalf of Vendor/firm	
Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur	
(type or print)/ (taper ou écrire en caractères d'imprimerie)	
Signature	Date



Amendment 003 – RFP # CIC-155593

Amendment 003 is raised to:

- Remove “The Solution must be compliant with the version of Microsoft Edge in use at IRCC - Support only TLS 1.2 and greater – 256-AES cipher as well as future versions of Microsoft Edge and other internet browsers (e.g. Chrome).” and replace it by “The Solution must be compliant with the version of Microsoft Edge in use at IRCC and must provide support for future versions of Microsoft Edge and other internet browsers (e.g. Chrome) as required by IRCC;” in section 5.1 Software requirements – Technical Environment of the Appendix “D”, Statement of Work;
- Add “B12. Privacy” in Appendix “B”, Supplemental Terms and Conditions.

Section 5.1 SOFTWARE REQUIREMENTS in APPENDIX “D”, STATEMENT OF WORK is deleted in its entirety and replaced by:

APPENDIX “D”, STATEMENT OF WORK

5.1 Software requirements:

SOFTWARE AVAILABILITY

- The latest commercial release of the solution must be available by the contract award date.

TECHNICAL ENVIRONMENT

- The Solution and all stored data must be online and hosted on the Contractor’s secure servers.
- The Solution must provide for real-time security monitoring and notifications to IRCC for security events.
- The Solution must permit auditing for selected user and administrative actions.
- **The Solution must be compliant with the version of Microsoft Edge in use at IRCC and must provide support for future versions of Microsoft Edge and other internet browsers (e.g. Chrome) as required by IRCC;**
- The Solution must use data information to and from (interoperate) with Microsoft Outlook 2016 and compatible with future versions of Microsoft Outlook.
- The Solution must allow use of files with the following formats for client interactions: jpg, pdf, gif.
- The Solution must allow use of files with the following formats for uploading or downloading of data: xlsx, rtf.
- The Solution must accommodate up to 200 concurrent licence users, should IRCC wish to expand the use of the tool.
- The Solution must have open API affordances and communicate with Chatbot (Artificial Intelligence).
- The Solution must have access to Facebook, enabling the ability to respond to Facebook comments on posts and messages on Facebook Messenger.



- The Solution must have access to WhatsApp, enabling the ability to respond to messages received via WhatsApp.
- The Solution should have access to Twitter API, enabling the ability to respond to Twitter Direct Messages (DMs) and Twitter mentions.
- Any cloud solution must comply with GC and IRCC standards, policies, procedures.

SYSTEM ADMINISTRATION

- The Solution must include secure password authentication.
- The Solution must host the latest version software, as long as it's compatible with other mandatory requirements.
- The Solution must permit IRCC Account Administrators (Social Care Group) to assign access rights to an individual staff member or group.
- The Solution must not allow operations to be performed within the Solution unless the user is authorized for the operation concerned.
- The Solution must provide the ability to control various types of user access rights capability:
 - Read: client interactions; metadata (tags, notes, timestamps, conversation history, Helpdesk user data, data/metrics, etc.)
 - Write: client interactions (draft responses, approve responses and post responses); metadata (tags, notes, etc.)
 - Manage: right to manage tags (add, create, delete), right to assign tickets to other users for approval, right to export conversations to external documents
 - Generate reports
 - Export data
 - Right to perform system administrator tasks.
- The Solution must permit IRCC Account Administrators (Social Care Group) to create and manage all staff member information that IRCC deems required for the establishment and maintenance of user accounts.
- The Solution must allow IRCC users to be organized and managed into groups if needed.
- The Solution must allow or be configured to allow IRCC Account Administrators (Social Care Group) to manage the structured keywords or tags that users may associate with records for easy identification, permitting Account Administrators (Social Care Group) to create, delete/archive, and rename keywords or tags.

BUSINESS FUNCTIONALITY

- The solution must include or can be configured to include, standard fields for social media interactions:
 - Social media username (e.g. Twitter handle)
 - Channel of interaction (e.g. Twitter, Facebook) including the ability to create different groups within any of the channels
 - Ability to divide between groups across different channels
 - Conversation history between the social media user and IRCC
 - Ability to split comments and create a new ticket.



- Metadata associated with the conversation history (e.g. tags, notes, timestamps, Helpdesk users engaged, interaction status, etc.); and
 - Public profile information, as provided by the social media user.
- The Solution must be able to receive triaged tickets from a Chatbot.
- The Solution must allow to tag and untag assignments, and data must be filterable and exported by these tags.
- The Solution must include an internal notes function that users can post against a record.
- The Solution must allow users to edit, create and associate at least 50 tags to each record.
- The Solution must be able to automatically re-assign enquiries from returning clients to the same Helpdesk user.
- The Solution must be able to communicate with email (e.g. Outlook) for customizable ticketing updates depending on account administrators (Social Care Group) preferences:
 - Send reminder that a ticket has been opened for longer than service standard or for any other specified reason by agent;
 - Send email when a new ticket has been automatically assigned or triaged from Chatbot; and
 - Send email when there are technical difficulties or system issues to all users with access to solution.
- The Solution must include real-time information on the time a ticket has been opened (i.e. assigned but not resolved by IRCC users).
- The Solution must maintain a database of all client engagements and transactions.
- The Solution must be compatible with Social Media Publishing Platforms.
- The Solution must allow the display of .jpgs
- The solution must allow for the creation of 'rules' in order to perform a series of actions or tasks on tickets that fulfill specific requirements and scenarios
- The solution must be able to communicate with agents using the following notification functions:
 - Email notifications
 - Mutable desktop notifications
- The solution must allow users to filter tickets by channels and tags
- The solution must be configured to allow users to manage and label unsolicited messages
- The solution must allow users to associate tag(s) with a line of business
- For public comments and tweets the solution must link directly to the source on the native platform.
- The solution must contain functionality for linking and tracking tickets into trackers or categories
 - These trackers must be nameable, and must aggregate all tracked tickets in one place
- The solution must provide a 'history' for each ticket, tracking responses, notes, and other updates.
- The solution must be able to generate an email to forward client tickets to external clients without access to the solution.
- The solution must be able to update multiple ticket fields at once (e.g. bulk update)
- The solution must be able to order tickets by the following:
 - Date created
 - Last modified



- And both must be sortable both ascending and descending
- The solution must allow filtering of all tickets based on:
 - Channel
 - Creation date(s)
 - Status
 - Priority
 - Tags
 - Groups
 - Contacts
- The solution must allow tickets to be reassigned to agents or channels natively
- When a ticket is created or updated, the tool must be able to automatically add a tag to it, based on various properties of the ticket including but not limited to:
 - Notes
 - Replies added with specific key words

SEARCH

- The Solution must allow users to perform searches using fields such as:
 - Customizable date and date range
 - Limiting keyword and tag searches to specific time frames
 - Filters that show tickets by last modified, date created, ascending and descending
 - Type
 - Status
 - Social channels (Facebook and Twitter) and groups (within Facebook and Twitter)
 - Keywords and/or tags that can be stacked/excluded
 - Sentence / phrase
 - Social media username
 - Helpdesk user
 - Filtering tickets by assigned agent who closed the ticket
 - Filtering tickets by assigned agent who sent response
 - Line of business tag groups, and sub-groups
- The Solution's search function must allow users to search using full or truncated keywords or terms.
- The Solution must maintain a searchable database of all client engagements and transactions.

USER INTERFACE

- The Solution must provide a web-based user interface.
- Helpdesk users must have the ability to view the following:
 - Open assignments:
 - List of all open tickets (i.e. unresolved client interactions)
 - Time elapsed for open tickets
 - Full interaction history and metadata (tags, notes, timestamps, etc.) for open tickets
 - Filterable by fields such as: Helpdesk user, ticket status, timeframe, platform, tag, etc.



- All assignments:
 - Filterable through search, based on keywords, tags, notes, social media username, etc.
 - Filterable by fields such as: Helpdesk user, ticket status, timeframe, platform, tag, etc.
 - Filterable by social network, message type, assignment options (to, by, resolved by), etc.
- The Solution must permit the use of the complete English and French language character sets.
- The Solution must be screen reader friendly using assistive technologies such as screen magnifiers, text to speech and sound icons.
- The Solution must allow the Client to work in the official language of their choice: English and French (including viewing all screens, collecting responses and accessing technical support).

REPORTS

- The Solution must allow users the ability to customize, generate, and download reports so that they can be run from within the system within a specific date range:
 - Assignments with specific tag(s)
 - Assignments resolved per individual
 - Assignments created per 'group'
 - Assignments resolved per 'group'
 - Pickup/handling time per individual, team and/or with specific tags within a specific date range
 - Average resolution time/ration per individual, team and/or with specific tags within a specific date range
 - Inbound message topics (based on social media user metadata)
 - Timeframe
 - Key words
 - Aggregate vs. individual data

The Solution must be able to generate and store both standardized and ad hoc reports.

- The Solution must allow users to generate reports based on the previous 180 days (minimum) of data/transactions.
- The Solution must allow, or can be configured to allow users to export reports at a minimum in xlsx, pdf and doc.



APPENDIX “B”, SUPPLEMENTAL TERMS AND CONDITIONS is deleted in its entirety and replaced by:

APPENDIX “B”, SUPPLEMENTAL TERMS AND CONDITIONS

B1. Priority of Documents

If there is a discrepancy between the wording of any documents that appear on the list below, the wording of the first document that appears on the list has priority.

- a) The Articles of Agreement;
- b) Appendix “B” – Supplemental Terms and Conditions;
- c) Appendix “A” – General Terms and Conditions;
- d) Appendix “C” – Terms of Payment;
- e) Appendix “D” – Statement of Work;
- f) Appendix “E” – Basis of Payment
- g) Appendix “F” – Vendor Information and Authorization Form;
- h) the Contractor's proposal dated _____(TBD)

B2. CIC Clauses

The following Citizenship and Immigration Canada Terms and Conditions are incorporated by reference and form part of this Contract:

ID	Date	Title
		<u>CIC-SC-001(2015-02-16), Contractor Owns Intellectual Property (IP) Rights in Foreground Information</u>

B3. SACC Manual Clauses

The following SACC manual Clauses are incorporated by reference and form part of this Contract:

ID	Date	Title
<u>A9117C</u>	<u>2007-11-30</u>	<u>T1204 - Direct Request by Customer Department</u>
<u>A9116C</u>	<u>2007-11-30</u>	<u>T1204 Information Reporting by Contractor</u>
<u>C0705C</u>	<u>2010-01-11</u>	<u>Discretionary Audit</u>

B4. Security Requirement

There is no security requirement associated with the requirement.

B5. Period of Contract

The period of the Contract is from contract award to one year from contract award.



B5.1 Option to Extend the Contract

The Contractor grants Canada, the irrevocable right to extend the terms of the Contract by up to four (4) additional one (1) year periods under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in Appendix "E", Basis of Payment.

In addition to the four (4) options of one (1) year, there are five (5) options of up to twenty five (25) licenses in each year. One option for the initial contract and four (4) options for the options of one (1) year. For a total of up to hundred (100) optional licenses.

There are also five (5) additional options of up to fifty (50) access to Twitter. One option for the initial contract and four (4) options for the options of one (1) year; For a total of up to two hundred and fifty (250) optional access to Twitter.

Canada may exercise this option at any time by sending a written notice to the Contractor at least (1) one calendar day before the Contract expiry date. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

B6. Termination on Thirty (30) Days Notice

1. Canada reserves the right to terminate the Contract at any time in whole or in part by giving thirty (30) calendar days written notice to the Contractor.
2. In the event of such termination, Canada will only pay for costs incurred for services rendered and accepted by Canada up to the date of the termination. Despite any other provision of the Contract, there will be no other costs that will be paid to the Contractor as a result of the termination.

B7. Certifications / Compliance and Additional Information

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

B8. Insurance Requirements

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.

B9. Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work in Appendix "D".



B10. Authorities

B10.1 Contracting Authority

The Contracting Authority for the Contract is:

<The Contracting Authority for the Contract is to be identified at Contract award>

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

B10.2 Project Authority

The Project Authority for the Contract is:

<The Project Authority for the Contract is to be identified at Contract award>

The Project Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Project Authority; however, the Project Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

B10.3 Technical Authority

<The Technical Authority for the Contract is to be identified at Contract award>

The Technical Authority will be responsible for providing guidance on the technical requirements and deliverables.

B10.4 Contractor's Representative

<The Contractor's Representative for the Contract is to be identified at Contract award>

B11. Limitation of Liability

B11.1 First Party Liability:

- a. The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:
 - i. any infringement of intellectual property rights to the extent the Contractor breaches the section of the general conditions entitled "Intellectual Property Infringement and Royalties";
 - ii. physical injury, including death.
- b. The Contractor is liable for all direct damages caused by the Contractor's performance or failure to perform the Contract affecting real or tangible personal property owned, possessed, or occupied by Canada.



- c. Each of the Parties is liable for all direct damages resulting from its breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of its unauthorized disclosure of the other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.
- d. The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (a) above.
- e. The Contractor is also liable for any other direct damages to Canada caused by the Contractor's performance or failure to perform the Contract that relate to:
 - i. any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including Applicable Taxes) for the goods and services affected by the breach of warranty; and
 - ii. any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (ii) of the greater of _____ times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the block titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$_____. (*Insert the amount from the appropriate commodity grouping.*)

In any case, the total liability of the Contractor under paragraph (e) will not exceed the total estimated cost (as defined above) for the Contract or \$_____, (*insert the dollar amount entered in subparagraph (ii)*), whichever is more.

- f. If Canada's records or data are harmed as a result of the Contractor's negligence or willful act, the Contractor's only liability is, at the Contractor's own expense, to restore Canada's records and data using the most recent back-up kept by Canada. Canada is responsible for maintaining an adequate back-up of its records and data.

B11.2 Third Party Claims:

- a. Regardless of whether a third party makes its claim against Canada or the Contractor, each Party agrees that it is liable for any damages that it causes to any third party in connection with the Contract as set out in a settlement agreement or as finally determined by a court of competent jurisdiction, where the court determines that the Parties are jointly and severally liable or that one Party is solely and directly liable to the third party. The amount of the liability will be the amount set out in the settlement agreement or determined by the court to have been the Party's portion of the damages to the third party. No settlement agreement is binding on a Party unless its authorized representative has approved the agreement in writing.



- b. If Canada is required, as a result of joint and several liability, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite paragraph (a), with respect to special, indirect, and consequential damages of third parties covered by this section, the Contractor is only liable for reimbursing Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of a third party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.

- c. The Parties are only liable to one another for damages to third parties to the extent described in this paragraph 3.

B12. Privacy

The Solution must maintain compliance with Government of Canada encryption guidance over the course of the contract. Refer to this link for more details : [Cryptographic algorithms for UNCLASSIFIED, PROTECTED A, and PROTECTED B Information - ITSP.40.111 - Canadian Centre for Cyber Security](#)

ALL OTHER TERMS AND CONDITIONS REMAINS THE SAME.