



# ANNEX A

STATEMENT OF WORK

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## PART 1 END USER SERVICE DESK / ENTERPRISE SERVICE DESK

### 1. Introduction

The scope of services under this part includes the provisioning of resources (“In Scope Resources”), described in Section 6.0 In Scope Resource Requirements of this part, for both the End User Service Desks and the Enterprise Service Desk which are described as follows:

#### 1.1. End User Service Desk

The End User Service Desk (“EUSD”) operates three service desks supporting the desktop environments for three Customer Departments. The EUSD service includes the reporting of incidents, service desk support, and the fulfilment of service requests. The EUSD agents are dedicated to their assigned Customer Department, with cross-training between select Customer service desks undertaken where applicable.

#### 1.2. Enterprise Service Desk

The Enterprise Service Desk (“ESD”), operating as the first point of contact for all Partner Service Desks, Small Departments and Agencies (SDA), Vendors, Support Providers and SSC infrastructure support groups (SSR) using either a desk-to-desk or IT-to-IT support model. ESD services involves the creation, triage and escalation of incident reporting, Service Requests and Change Management, which includes ticket creation, escalation, and resolution wherever possible. The ESD serves as the escalation point of contact for all in-scope tickets from Partner Service Desks, SDAs, Vendors and SSRs. The ESD also provides a single point-of-contact on status inquiries and informational requests pertaining to service requests, incidents and change requests.

In addition to the provisioning of In Scope Resources, the Service Provider will have cross functional responsibilities. The full scope of the EUSD and ESD Services that are the subject of this RFP are detailed in Section 5 - Service Description of this part. Shared Services Canada (“SSC”) has written the statement of work to focus on specific activities/outcomes that the Service Provider must perform/achieve. When preparing their pricing submission, bidders are also encouraged to review APPENDIX H FINANCIAL RESPONSIBILITIES MATRIX for Service Provider responsibilities.

### 2. Contract Terms

The follow terms will apply:

#### 2.1. Location

All Service Provider services will be executed through a combined Service Provider physical facility (or facilities) and a remote work-from-home solution, delivered from within Canada. The Service Provider will be responsible for the provisioning of workspaces, and associated costs, to meet the following requirements:

##### 2.1.1. Physical Facility Requirements

The Service Provider shall provide one or more physical facilities (“Facilities”) to meet the following minimum requirements:

- i. Facilities must be located in Canada with a minimum of one facility located in a major metropolitan area;

- ii. 80 agent workspaces\* and 10 non-agent workspaces;
- iii. Training, rooms meeting rooms, and common areas as deemed necessary by the Service Provider;
- iv. Valid Facility Security Clearance; and
- v. Compliance with Government of Canada requirements.

\* where the Service Provider's proposed Transition Plan (see Attachment 4.1 Technical Criteria) has a temporary workspace requirement in excess of those stated in this section, the Service Provider will be required to provision such temporary workspace requirements at their own cost.

SSC shall have the right to inspect the Facilities prior to commencement of service delivery and periodically during the Contract Term. In addition, unrestricted access to the Facility must be provided to authorized Shared Services Canada staff for operational purposes (i.e. training, meetings etc.).

Prior to the end of the of the initial term, SSC will, in consultation with the Service Provider, assess future Facility requirements and inform the Service Provider accordingly.

### 2.1.2. Remote Requirements

All resources will be required to work from the Facility immediately following their initial intake, and periodically over the course of their engagement. Accordingly, all resources must reside within a reasonable proximity to the Facility for the initial term of the contract.

The Service Provider, through its recruiting efforts, shall maximize the number of resources that qualify to meet the necessary performance and infrastructure standards to work remotely. It is expected that all resources, following intake, will work in the Facility for an initial minimum three (3) month qualification period. After expiration of the qualification period, resources may earn the "right" to work remotely upon achieving, and maintaining, minimum performance standards. The Service Provider will be responsible for managing the deployment of staff (between the Facility and Remote locations), the monitoring of resource performance against minimum performance standards, and ensuring compliance with the Remote Work Agreement.

It will be the Service Provider's responsibility to propose an approach to managing a distributed workforce ("DW Approach") which will include, but not be limited to, the establishment of minimum performance standards, minimum infrastructure requirements, mandated scheduled periodic return to the Facility, and a Remote Work Agreement between the Service Provider and each resource. SSC shall have final approval over the ultimate DW Approach and will have the right to require revisions to the DW Approach, when justified, at no additional cost to SSC.

On-going responsibilities for the Service Provider pertaining to the DW Approach will include, but not be limited to: (i) monitoring of resource performance to ensure minimum performance standards are met, and (ii) ensuring resource compliance with the Remote Work Agreement.

Prior to the end of the of the initial term, SSC will, in consultation with the Service Provider, assess whether transformation to a fully distributed workforce is appropriate. In the affirmative instance, SSC will work with the Service Provider to establish an optimal recruitment catchment within Canada.



### 2.1.3. Disaster Recovery and Business Continuity Planning

The Service Provider will bear ultimate responsibility for the provisioning of resources, the provisioning of workspaces (Facility and Remote), and the distribution of resources between the Facility and Remote locations. Accordingly, Bidders are required to propose an approach to Disaster Recovery and Business Continuity Planning (“DR & BCP Approach”) which will include, but not be limited to, the establishment of policies and procedures with respect to workspace provisioning and resource deployment that addresses the following minimum operational requirements:

- i. 25% of EUSD operational capacity and 25% of ESD operational capacity must be available at all time during normal operating hours;
- ii. 50% of EUSD operational capacity and 50% of ESD operational capacity must be restored within 4 hours of a disruptive event (to be defined);
- iii. 90% of EUSD operational capacity and 90% of ESD operational capacity must be restored within 33 FGWDs; and
- iv. 100% of EUSD operational capacity and 100% of ESD operational capacity must be restored within a reasonable time frame.

### 2.2. Laptop, Applications and Telephones

During the Contract period, SSC will provide a laptop, monitor(s)/docking port, soft phone/headset, token/device for third party second factor authenticator application and desktop software for use by In Scope Resources.

### 2.3. Operating Hours

Operating hours for the EUSD and ESD are as follows:

**Table 1: Operating Hours for the EUSD (by individual service desk)**

CUSTOMER DEPARTMENT NAME	CORE BUSINESS HOURS	SATURDAYS AND SUNDAYS	FEDERAL STAT HOLIDAYS
Public Services and Procurement Canada	06:00 – 21:00 E.T.	09:00 – 17:00 E.T.	N/A
Health Canada	07:00 – 20:00 E.T.	N/A	N/A
Shared Services Canada	06:00 – 20:00 E.T.	N/A	N/A

**Table 2: Operating Hours for the ESD**

CLIENT NAME	CORE BUSINESS HOURS	SATURDAYS AND SUNDAYS	FEDERAL STAT HOLIDAYS
All ESD Partner Service Desks, SDAs, Vendors, Support Providers and SSRs	24 Hours / 7 Days 365 Days a Year Including all Holidays		

### 2.4. Language Requirement

The EUSD and ESD are required to provide support services to users in the official language of their choice. Those support services, including all written and verbal communications, must be of equal quality and level of service in English and French, at all times.

## 2.5. Security Requirements

The Service Provider must provide and deliver Service Desk Services that meet Canada's security requirements as outlined in this document, and with the provisions of the Security Requirements Check List (SRCL) that is provided in this document.

***SSC will be providing government issued IT equipment and will be allowing remote access to up to Protected B of Government of Canada (GoC) information to the Service Provider. The security authority of SSC acknowledges and accepts all associated security risks and as such the Contract Security Program (CSP) will not conduct any inspections related to Digital Security Controls (DSC/IT) for this contract.***

## 3. End User Service Desk Current State Summary

Since 2010, SSC has outsourced the End User Service Desk functions for select Customer Departments. The contract with the current Service Provider is set to expire in Spring of 2025. Bidders should note that Government of Canada data currently resides in Canada and this mandatory requirement must be maintained throughout the duration of any subsequent contract.

### 3.1. End User Service Desk Services

SSC's End User Service operates individual dedicated end user service desks supporting the desktop environments for three Customer Departments. Currently, the primary contact methods for issue reporting are by local/toll-free number and chat, with the potential of expanding to other contact channels as technologies become available. The End User Service Desk services include ticket creation, escalation, and resolution wherever possible. In the event that service desk agents are unable to resolve the end user's issue, it will be escalated to the appropriate support group(s) for resolution. SSC provides the following tools for use by end user service desk agents:

#### 3.1.1. Telephony Platform

The EUSD currently uses the Hosted Contact Centre Service (HCCS) Telephony Platform. HCCS enables Departments/Agencies to interact with external and internal GC clients efficiently, effectively, and economically. The Telephony Platform provided by SSC is subject to change at SSC's discretion.

#### 3.1.2. Remote Takeover Tools

Remote Takeover Tool(s) shall be provided by SSC. It is expected that all agents will be trained to use these tool(s) to ensure high First Contact Resolution service levels are achieved. The tool(s) used for remote takeover are subject to change at SSC's discretion.

#### 3.1.3. Knowledge Database

The Knowledge Database shall be provided by SSC. The knowledge base is kept up to date as new applications, supported departments/agencies, or products are added to the environment. The knowledge base consists of common incidents with their solutions as well as lists of resolution attempts for common incident symptoms. Diagnosis methodologies are entered in this database for several incident types. It is expected that all agents will be trained to use the knowledge base to ensure high First Contact Resolution service levels are achieved. Based on their assigned roles and responsibilities, specified Service Provider resources will also be expected to contribute to the creation of new articles, as well recommend changes to existing articles in order to keep the

EUSD knowledge base current. The EUSD knowledge base tools are subject to change at SSC's discretion.

#### 3.1.4. Incident and Change Management Tools

The Service Desk currently uses multiple IT Service Management ("ITSM") tools to manage reported issues. The ITSM tools in use are subject to change at SSC's discretion.

### 3.2. Request Fulfilment

Request Fulfilment involves the processing of service requests that are defined as pre-approved, low risk changes to the desktop/infrastructure environments that follow standardized and documented procedures. Currently the primary contact methods for service requests are by email and through an on-line service portal, with the potential of expanding to other contact channels as technologies become available.

#### 3.2.1. Request Fulfilment Tools

Multiple ITSM tools are used for recording and tracking Installs, Moves, Adds and Changes ("IMACs"). The ITSM tool(s) used for Request Fulfillment are subject to change at SSC's discretion.

## 4. Enterprise Service Desk Current State Summary

Since 2013, SSC has outsourced the ESD function to a third party. The contract with the current Service Provider is set to expire in Spring of 2025. Bidders should note that Government of Canada data currently resides in Canada and this mandatory requirement must be maintained throughout the duration of any subsequent contract.

### 4.1. Enterprise Services

The Enterprise Service Desk currently provides incident change management services for the 43 Partners of Shared Services Canada, as well as other SDAs, Vendors, Support Providers, and SSRs on a 24 hours a day, 7 days a week basis. It serves as the national escalation point of contact for all tickets from the various Partner Service Desks and SDAs. The ESD is also the interface to third-party vendors and internal SSC resources, and operates as the after-hour Partner and department service desk responsible for incident creation, escalation, and resolution.

Currently the primary contact methods are toll-free number, email and an on-line portal with the potential of expanding to other contact channels as technologies become available.

#### 4.1.1. Telephony Platform

The ESD currently uses the Hosted Contact Centre Service (HCCS) Telephony Platform. HCCS enables Departments/Agencies to interact with external and internal GC clients efficiently, effectively, and economically. The Telephony Platform provided by SSC is subject to change at SSC's discretion.

#### 4.1.2. Incident and Change Management Tools

The Service Desk currently uses multiple IT Service Management ("ITSM") tools to manage reported issues. The ITSM tool(s) in use are subject to change at SSC's discretion.

## 4.2. Request Fulfilment

Request Fulfilment involves the processing of service requests that are defined as pre-approved, low risk changes to infrastructure environments that follow standardized and documented procedures. Currently the primary contact methods for service requests are by email with the potential of expanding to other contact channels as technologies become available.

### 4.2.1. Request Fulfilment Tools

Multiple ITSM tools are used for recording and tracking Service Requests. The ITSM tool(s) used for Request Fulfillment are subject to change at SSC's discretion.

## 5. Service Descriptions

This section details the service requirements that Proponents will be expected to incorporate into their proposal and pricing. These services do not necessarily reflect what or how services are currently delivered by the current Service Provider.

Proponents should read this section in conjunction with ANNEX A SOW Sections 1-4, ANNEX A SOW: Appendix H Financial Responsibilities Matrix, Attachment 3.1 Pricing Tables, and Attachment 4.1 Technical Criteria.

In this section, service requirements have been separated into cross-functional services with stated desired objectives. Roles and responsibilities are attributed to actors as follows:

- Service Provider – these reflect the Service Provider’s roles and responsibilities that the Service Provider will provide and be compensated for through Facilities Costs, Transition Charges, or as overhead applied to per diem unit prices for “In Scope Resources” described in ANNEX A SOW Section 6.0. As the cost of In Scope Resources shall be recovered through per diem unit prices, it is understood that, where Service Provider roles and responsibilities are fulfilled by In Scope Resources, such roles and responsibilities shall not be fulfilled during normal operating hours.
- In Scope Resources – these reflect the roles and responsibilities of in Scope Resources for which SSC will pay per diem unit prices. For greater certainty, In Scope Resources shall not engage in the fulfilment of Service Provider roles and responsibilities during the same hours for which per diem unit charges are being paid by the Government of Canada.
- Shared Services Canada – these reflect the roles and responsibilities of Shared Services Canada.

### 5.1. Transition-In

Objective: ensure that there is no degradation of services during transition, with Service Provider fully capable of delivering contracted services at/or beyond pre-transition levels within the time frame established in the approved Final Transition Plan.

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
Must provide a Draft Transition Plan at bid close that addresses the scope of transition activities / charges described in Attachment 3.1 Pricing tables - Part C and point-rated criteria RR1 of Attachment 4.1 Technical Criteria.	-	SSC shall review the Proposed Final Transition Plan and approve "as is" or request changes at its discretion.
Must provide a Proposed Final Transition Plan within the allowed timeframe	-	SSC shall not change the technical infrastructures or environments during the 30-day Transition-In Period.
Must ensure that the transition of its staff and processes associated with all functions is performed in such a manner that it is ready and able to carry out all work associated with the function by the end of the Transition-In Period.	-	If an equivalent resource is provided, the resource is subject to approval by SSC.
Must ensure that the resources proposed by the winning bidder must have the experience, skills and knowledge to perform their roles, and may require specific knowledge transfer on specific aspects of the SSC domain or systems to assume operational responsibilities.	-	SSC shall notify the Service Provider, in writing, of acceptance of the Transition when the Service Provider has demonstrated to the satisfaction of SSC that it is ready to carry out all of the work described in this SOW.
Must ensure key resources are available on a full time basis from the first day of the Transition-In Period, and for a minimum of 6 months following the end of the Transition-In Period.	-	-
Must ensure that key resources are made available as required by SSC, and will be expected to learn the key aspects of the functions from the incumbent resources during the Transition Period.	-	-
Must ensure that key resources are available to perform certain work outside of regular business hours as required.	-	-
Must ensure that resource availability is maintained and that the Service Provider's Transition activities do not cause service disruptions.	-	-
Must provide Shared Services Canada with a weekly "Transition-In" report detailing the status of all "Transition-In" activities as well as transition issues, mitigation, progress, recommendations and any other pertinent details.	-	-
Must ensure that all requirements of the Transition-In Plan are implemented on schedule.	-	-

## 5.2. Governance

Objective: ensure adherence to formal governance (described in ANNEX A SOW: Appendix C Governance) with respect to meeting frequency and content over the course of the engagement.

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
ACCOUNT EXECUTIVE Attendance at scheduled governance meetings (See ANNEX A SOW: Appendix B - Section 1.0 Governance Model).	CLIENT DELIVERY EXECUTIVE / SERVICE DELIVERY MANAGER / OPERATIONS MANAGER / DOMAIN LEAD / TEAM LEAD Attendance at scheduled governance meetings (See ANNEX A SOW: Appendix B - Section 1.0 Governance Model)).	SENIOR DIRECTOR / DIRECTOR / EUSD-ESD MANAGER / FULFILMENT MANAGER / SENIOR ADVISOR: Attendance at scheduled governance meetings (See ANNEX A SOW: Appendix B - Section 1.0 Governance Model).
Must provide a single point of contact who is responsible for interfacing with SSC on matters related to the Service Provider's delivery of Services.	CLIENT DELIVERY EXECUTIVE Work with various work units and personnel to define appropriate paths for the flow of contract information and status.	Manage the Contracts and Service Provider relationships.
Must maintain and communicate up-to-date single point of contact information (accessible via telephone, email address, and web-enabled interfaces) to Shared Services Canada.	CLIENT DELIVERY EXECUTIVE Establish the necessary management structure and related processes to ensure that all responsibilities that are specified in this SOW are carried out such that the terms and conditions are met.	-
Must manage In Scope Resources to ensure that service levels are met as per the SLA.	CLIENT DELIVERY EXECUTIVE Plan, manage and execute all contracted activities.	-
-	CLIENT DELIVERY EXECUTIVE Establish mechanisms for ongoing working interfaces (e.g. daily, weekly or monthly meetings and quarterly reviews) with team members managed under the Service Desk contract.	-
-	CLIENT DELIVERY EXECUTIVE Manage all personnel based resources in such a manner to avoid any employer-employee relationship with respect to SSC and the contractor's personnel resources.	-
-	SERVICE DELIVERY MANAGER Lead a team of professionals in the delivery of IT services such as overseeing workforce management, quality assurance and operational performance.	-
-	SERVICE DELIVERY MANAGER Manage the staff required to provide the Service Desk services.	-
-	SERVICE DELIVERY MANAGER Manage the quality of the services delivered.	-
-	SERVICE DELIVERY MANAGER Liaise with various work units and Personnel to address issues directly affecting day-to-day operations.	-

### 5.3. Recruiting

Objective: ensure adherence to a recruiting process that provides ready access to sufficient quantities (ANNEX A SOW Section 6.0 In Scope Resource Requirements) of qualified resources meeting the requirements of language (ANNEX A SOW Section 2.4 Language Requirement) and minimum experience for the respective position (ANNEX A SOW: Appendix A Category Descriptions), while addressing the risks associated with the recruitment and retention of qualified resources (Attachment 4.1 Technical Criteria ).

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
<p>Must apply the risk mitigation approach described in point-rated requirement RR2 of Attachment 4.1 Technical Criteria that, at a minimum, addresses the risks associated with the recruitment and retention of qualified resources (in the context of the bidder’s proposed solution), which includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>i. a mechanism for monitoring the risk over the term of the contract;</li> <li>ii. a process to keep the contract authority / technical authority informed of the status of the risk over the term of the contract;</li> <li>iii. a Mitigation Plan to reduce impact of the risk; and</li> <li>iv. a list of contingency actions available in the event that the Mitigation Plan is inadequate.</li> </ul>	<p>OPERATIONS MANAGER Perform Final Interview to ensure candidates meet technical skills and language requirements.</p>	<p>Post transition, SSC will provide a Resource Forecast on a three month rolling basis. The monthly staffing levels within the forecast will not vary more than 5% (with exception) from month-to-month for each Task Authorization. The first two months of the three month rolling forecast will be locked once SSC provides it to the Service Provider. The staffing level is to be maintained at 95% or higher than the Resource Forecast (see ANNEX A SOW: Appendix E Service Level Descriptions).</p>
<p>Must bear all costs associated with the recruitment of qualified candidates for consideration by SSC to fulfil staffing requirements.</p>	<p>OPERATIONS MANAGER Complete Resource Assessment Form attesting to the fact that the proposed resource meets the language requirement and has the technical skills required to fulfil the responsibilities of the position being filled</p>	<p>SSC shall, at its discretion, participate in the interviewing process for any candidate</p>
<p>Must not fulfill staffing requirements with any resource that does not meet the required standards, as determined by SSC, at its sole discretion.</p>		<p>SSC shall review the Completed Resource Assessment Form and approve the form or return the Form with additional questions, or reject the candidate.</p>
		<p>SSC shall have the right to determine, at its sole discretion, whether it will continue to accept any resources on the engagement.</p>



### 5.4. In Scope Resource On-Boarding

Objective: ensure that on-boarding of In Scope Resources to meet staffing requirements is addressed in a timely and efficient manner.

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
-	OPERATIONS MANAGER request user IDs, create IDs, passwords and In Scope Resource access as required and authorized.	Approve requests for user IDs, create IDs, provide initial passwords, and grant end user access as required.
-	SENIOR / INTERMEDIATE ACCOUNT ADMINISTRATOR Perform Service Desk account security such as obtain accounts, establish accounts, implement accounts, and enforce accounts as necessary.	-
-	SENIOR / INTERMEDIATE ACCOUNT ADMINISTRATOR Obtain/establish, implement and enforce security procedures that will ensure the safety of the corporate and individual's information for all accounts processed by the EUSD.	-
-	SENIOR / INTERMEDIATE ACCOUNT ADMINISTRATOR Assist "In Scope Resource" in the addition, creation and changes of logon IDs according to SSC defined processes for access requests.	-
-	SENIOR / INTERMEDIATE ACCOUNT ADMINISTRATOR Create new logon IDs, file shares and appropriate directories.	-
-	SENIOR / INTERMEDIATE ACCOUNT ADMINISTRATOR Make logon ID changes in user privileges as requested via SSC defined access request process.	-
-	DOMAIN LEAD Add new Service Desk Agents phones into the system, or change phone assignments with the addition or movement of Service Desk resources.	-

### 5.5. Training

Objective: ensure that training of In Scope Resources is based on an SSC approved training plan that provides In Scope Resources with the training required to allow them to be successful in their respective positions, while addressing the risks associated with the ability to provided timely and effective training (Attachment 4.1 Technical Criteria).

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
<p>Must apply the risk mitigation approach described in point-rated requirement RR3 of Attachment 4.1 Technical Criteria that, at a minimum, addresses the risks associated with the ability to provide timely and effective training for personnel (in the context of the bidder’s proposed solution), which includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>i. a mechanism for monitoring the risk over the term of the contract;</li> <li>ii. a process to keep the contract authority / technical authority informed of the status of the risk over the term of the contract;</li> <li>iii. a Mitigation Plan to reduce impact of the risk; and</li> <li>iv. a list of contingent actions available in the event that the Mitigation Plan is inadequate</li> </ul>	<p>TRAINER Develop and maintain training documentation based on existing Operational documentation including support scripts.</p>	<p>Provide the Service Provider all information necessary to develop training documentation, policy guides, reference manuals, procedures and support scripts necessary for Service Desk staff and technicians to function appropriately.</p>
	<p>DOMAIN LEAD / TRAINER Prepare Training Plan.</p>	<p>SSC To Instruct changes at its discretion (add corresponding requirement in In Scope Column)</p>
-	<p>DOMAIN LEAD Recommend changes to Training Plan based on identification of changes to training needs.</p>	<p>Final approval Training Plan.</p>
-	<p>DOMAIN LEAD Provide Training to Team Leads.</p>	<p>Final approval Training Plan.</p>
-	<p>TRAINER Identify user training needs based on patterns and frequency of contacts to the Service Desk and provide to Domain Lead.</p>	<p>Final approval to changes to training documentation.</p>
-	<p>TRAINER Train Service Desk staff according to SSC’s approved Training Plan and curriculum. Demonstrate that effective and successful training occurred.</p>	<p>Final approval of changes to Training Plan.</p>

### 5.6. Facilities

Objective: ensure that Service Provider Facilities meet the minimum requirements set out in ANNEX A SOW Section 2.1.1 with respect to location, capacity etc.

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
<p>Service Provider Facility must meet minimum requirements established in ANNEX A SOW Section 2.1.1, including:</p> <ul style="list-style-type: none"> <li>i. Facilities must be located in Canada with a minimum of one facility located in a major metropolitan area;</li> <li>ii. 80 agent workspaces* and 10 non-agent workspaces;</li> <li>iii. Training, rooms meeting rooms, and common areas as deemed necessary by the Service Provider;</li> <li>iv. Valid Facility Security Clearance;</li> <li>v. LEEDS Certification; and</li> <li>vi. Compliance with Government of Canada requirements</li> </ul> <p>* where the Service Provider’s proposed Transition Plan (see Attachment 4.1 Technical Criteria) has a temporary workspace requirement in excess of those stated in this section, the Service Provider will be required to provision such temporary workspace requirements at their own cost.</p>	-	<p>SSC shall have the right to inspect the Service Provider Facility prior to commencement of service delivery, and periodically during the Contract Term (see ANNEX A SOW Section 2.1.1).</p>
<p>Must bear all facilities costs including, but not limited to, security accreditation, cost to meeting DR and BCP requirements, leasehold improvements, maintenance, capacity upgrades, physical security, fire suppression, insurance, power and electrical, HVAC, cabling etc. (see ANNEX A SOW: Appendix H Financial Responsibilities Matrix).</p>	-	<p>SSC to have unrestricted access to the Facility must be provided to authorized Shared Services Canada staff for operational purposes (i.e. training, meetings etc.) (see ANNEX A SOW: Section 2.1.1).</p>
<p>Must bear the cost of internet Connectivity (Service Provider to SSC) (see ANNEX A SOW: Appendix H Financial Responsibilities Matrix)</p>	-	<p>Prior to the end of the of the initial term, SSC will, in consultation with the Service Provider, assess future Facility requirements and inform the Service Provider accordingly.</p>
-	-	<p>Provide GC WAN Hardware (see ANNEX A SOW: Appendix H Financial Responsibilities Matrix)</p>

### 5.7. Remote Work-from-home

Objective: ensure adherence to an approach to managing a distributed workforce that meets the established requirements (ANNEX A SOW Section 2.1.2 Remote Requirements), and addresses the specific risks/challenges associated with the utilization of a distributed workforce (Attachment 4.1 Technical criteria).

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
<p>Must apply the risk mitigation approach (DW Approach) described in mandatory requirement MR5 of Attachment 4.1 Technical Criteria that, at a minimum, addresses the risks associated with the utilization of a distributed workforce, which includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>i. minimum performance standards required to “qualify” to work remotely;</li> <li>ii. minimum infrastructure requirements;</li> <li>iii. description of how a mandated scheduled periodic return to the facility will enhance agent productivity;</li> <li>iv. sample Remote Work Agreement;</li> <li>v. description of the approach to remotely manage agent productivity (specifically the process to be followed to ensure minimum performance standards are met and maintained);</li> <li>vi. description of the approach to ensure resource compliance</li> </ul>	<p>OPERATIONS MANAGER manage the deployment of staff (between the Facility and Remote locations), and monitor In Scope Resource performance against minimum performance standards.</p>	<p>SSC shall have final approval over the ultimate DW Approach and will have the right to require revisions to the DW Approach, when justified, at no additional cost to SSC.</p>
<p>On-going responsibilities for the Service Provider pertaining to the DW Approach will include, but not be limited to:</p> <ul style="list-style-type: none"> <li>i. monitoring of resource performance to ensure minimum performance standards are met; and</li> <li>ii. ensuring resource compliance with the Remote Work Agreement.</li> </ul>	-	<p>Prior to the end of the of the initial term, SSC will, in consultation with the Service Provider, assess whether transformation to a fully distributed workforce is appropriate. In the affirmative instance, SSC will work with the Service Provider to establish an optimal recruitment catchment within Canada.</p>
<p>The Service Provider, through it’s recruiting efforts, shall maximize the number of resources that qualify to meet the necessary performance and infrastructure standards to work remotely.</p>	-	-
<p>The Service Provider will be responsible for ensuring that In Scope Resources comply with the Remote Work Agreement.</p>	-	-
<p>Must bear the cost of reimbursement to personnel for associated costs including, but not limited to, hydro, space, internet etc. (see ANNEX A SOW: Appendix H Financial Responsibilities Matrix)</p>	-	-

### 5.8. Service Desk Equipment & Desktop Software

Objective: ensure that In Scope Resources have the requisites (ANNEX A SOW Section 2.2) to successfully perform the roles/responsibilities of their position.

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
-	<p style="text-align: center;">OPERATIONS MANAGER</p> <p>Manage allocation of Service Desk Equipment and Desktop Software through On-boarding and Off-boarding of In Scope Resources</p>	<p>Provide Service Desk Equipment (see ANNEX A SOW: Appendix H Financial Responsibilities Matrix).</p>
-	-	<p>Provide Service Desk Software (see ANNEX A SOW: Appendix H Financial Responsibilities Matrix).</p>

### 5.9. Voice Equipment

Objective: ensure that In Scope Resources have the requisites (ANNEX A SOW Section 3.2.1 / 4.3) to successfully perform the roles/responsibilities of their position.

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
Must provide Contractor Site Telephony Infrastructure (e.g. PBX) (see ANNEX A SOW: Appendix H Financial Responsibilities Matrix).	DOMAIN LEAD keep the inventory of pre-recorded phone system emergency messages current and accurate.	Provide Contact Centre Telephony Phone Solution (see ANNEX A SOW: Appendix H Financial Responsibilities Matrix).
-	DOMAIN LEAD perform minor administrative changes to the phone system in order to meet immediate operational requirements.	Provide Toll-Free Number (see ANNEX A SOW: Appendix H Financial Responsibilities Matrix).
-	DOMAIN LEAD: keep the inventory of pre-recorded phone system emergency messages current and accurate.	Record new phone system wait queues and voice mail messages to reflect any changes in procedure.
-	DOMAIN LEAD report all and any incidents affecting the phone system to Telecommunications immediately upon detection.	Adjust phone system open and close hours to reflect statutory holidays to ensure non-business hours script scenarios are followed
-	DOMAIN LEAD implement trusted workaround procedures until the phone system incident is resolved.	Work with Telecommunications and the vendor in order to troubleshoot and rectify incidents to restore service as quickly as possible.
-	DOMAIN LEAD work with Automatic Call Distribution telephony system: log in/out, and to set status.	Provide a trusted workaround procedure in the case of an incident affecting the phone system.
-	SERVICE DELIVERY MANAGER recommend to the Technical Authority changes to the telephony system script or other functions to enhance performance or meet new procedural requirements.	Coordinate the implementation and testing of all approved changes with Telecommunications and the vendor.
-	REPORTING ANALYST work with Automatic Call Distribution telephony system to generate reports as required.	Run the test script following any change to the system during non-business hours to ensure correct functionality is not adversely affected.
-	-	Keep the test script current, complete and accurate.

### 5.10. Service Desk Tools

Objective: ensure that In Scope Resources have the requisites (ANNEX A SOW Section 3.2.2 / 3.2.3 / 3.2.4 / 4.4) to successfully perform the roles/responsibilities of their position.

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
Recommend functional and informational changes to the ITSM tool in order to improve overall use of the ITSM tool and performance of the Service Desk and the information passed on to support groups.	-	Provide Service Desk Tools (see Financial Responsibilities Matrix Appendix H to Annex A).
Provide suggestions to improve EUSD/ESD knowledge base accuracy and effectiveness.	-	Manage and plan the technologies and associated capacity requirements that will be used in the delivery of services.
-	-	Manage the progress, to the extent possible, to a standardized IT environment - infrastructure and architecture.
-	-	Implement tools necessary to provide Service Desk services and meet SSC informational and functional requirements.
-	-	Configuration and management of incident management tools.
-	-	Provide Service Desk personnel access to a EUSD and ESD knowledge bases to search for information when responding to SSC service requests and incidents.
-	-	Maintain Service Desk operations documentation including support scripts.
-	-	Perform modifications to maintain or improve knowledge base efficiency and effectiveness.

5.11. Processes/Procedures

Objective: ensure that approved processes and procedures are well documented, are updated where/when deemed appropriate, and efficiently and effectively address the dynamic requirements of the respective service desks over the term of the engagement.

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
Review all service request management interfaces and service centre categories and statuses used by the Service Desk, and recommend changes to ensure that the categories and status reflects at all times the nature and the flow of work processed.	OPERATIONS MANAGER Follow global work processes for all of the Service Provider's Service Desk installations to deliver consistent Services across locations.	Establish global work processes for all of the Service Provider's Service Desk installations to deliver consistent Services across locations.
Notify SSC when operational documentation and procedures require updating to ensure that information is accurate, current, and complete at all times.	OPERATIONS MANAGER Create Process Improvement Plan	Create and/or modify account administration documents, processes and guidelines, modification of processes and guidelines.
Implement, flag deficiencies, and suggest improvements to Service Desk procedures.	SERVICE DELIVERY MANAGER Implement approved management processes.	Ensure that Service Desk procedures are kept current in accordance with operational directives.
-	SERVICE DELIVERY MANAGER Implement processes in consultation with various work units and personnel which will track all new work and project related activities concerning Service Desk activities.	Create and Maintain a list of Roles and Responsibilities (RACI) chart for the Service Provider to follow.
-	SERVICE DELIVERY MANAGER Provide a mechanism for all Service Desk personnel to call another resource for help and guidance prior to escalating to on-call resources	Final approval for any changes to processes.
-	SERVICE DELIVERY MANAGER Analyze Service management performance reports to determine corrective actions and process improvements in areas such as call resolution and customer service.	-
-	DOMAIN LEAD Review client satisfaction surveys and customer feedback to take corrective action (i.e. update documentation, address performance concern, callback customer, etc.) in response to unsatisfactory feedback.	-
-	SERVICE DELIVERY MANAGER Implement corrective actions or process improvements related to call, incident, problem, escalation and change management.	-
-	ALL RESOURCES Adhere to RACIs created and maintained by SSC for the respective service desks.	-



5.12. Reporting

Objectives: ensure that the approved frequency and content of reporting addresses dynamic requirements (ANNEX A SOW: Appendix C Governance / ANNEX A SOW: Appendix D Reporting Requirements / ANNEX A SOW: Appendix E Service Level Descriptions / ANNEX F Resource Performance Assurance) of the respective desks over the term of the engagement.

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
-	REPORTING ANALYST Prepare daily and monthly Key Performance Indicators (KPIs) for EUSD and ESD (see ANNEX A SOW: Appendix D Section 1.0 Service Desk Reports).	Update and revise reporting requirements when deemed appropriate by SSC at its sole discretion.
-	REPORTING ANALYST Prepare daily month-to-date Agent/Administrator Scorecards for EUSD, Health Canada, Request fulfilment and ESD (see ANNEX A SOW: Appendix D Section 2.1 Agent/Administrator Scorecards and ANNEX A SOW: Appendix F Section 4.1 Agent/Administrator Scorecards).	Final approval for any changes to processes.
-	REPORTING ANALYST Prepare daily and month-to date Agent Report Cards for EUSD and ESD calls (see ANNEX A SOW: Appendix D Section 2.2 Agent Report Cards and ANNEX A SOW: Appendix F Section 4.2 Team Lead Follow-up).	-
-	REPORTING ANALYST Prepare daily EUSD Daily Calls Report (see ANNEX A SOW: Appendix D Section 2.3 EUSD Daily Calls Report and ANNEX A SOW: Appendix F Section 5.0 EUSD Call Statistic Review).	-
-	REPORTING ANALYST Prepare daily and monthly Staffing Reports for EUSD, ESD and ECC (see ANNEX A SOW: Appendix D Section 3.0 Staffing Reports) for review at bi-weekly Business Touch Base and monthly Service Management Committee Meeting (see ANNEX A SOW: Appendix C Section 1.0 Governance Model).	-
-	REPORTING ANALYST Prepare daily Month-to-Date EUSD Service Level Objective Categories against SLO Targets (see ANNEX A SOW: Appendix E Section 1.0 Service Level Objectives) for review at EUSD Daily Service Operations Team Meetings (see ANNEX A SOW: Appendix C Section 1.0 Governance Model).	-

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
-	<p style="text-align: center;">REPORTING ANALYST</p> <p>Prepare weekly (month-to-date) ESD Service Level Objective Categories against SLO Targets (see ANNEX A SOW: Appendix E Section 1.0 Service Level Objectives) for review at weekly ESD Manager's On-on-One Meeting Meetings (see ANNEX A SOW: Appendix C Section 1.0 Governance Model).</p>	-
-	<p style="text-align: center;">REPORTING ANALYST</p> <p>Prepare all ad hoc reporting requests by Shared Services Canada.</p>	-

### 5.13. Vendor Performance SLAs

Objective: ensure that Vendor performance meets or exceeds targets service levels (ANNEX A SOW: Appendix E Section 2.0 Service Level Agreements) for each of the EUSD, ESD and ECC measured independently.

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
Prepare reports of measured level of performance against SLA targets for prior month for EUSD, ESD and ECC (see ANNEX A SOW: Appendix D Section 2.2 Monthly Reporting) for presentation at Monthly Service Management Committee Meetings (see ANNEX A SOW: Appendix C Section 1.0 Governance Model).	QUALITY ASSURANCE ANALYST Implement the Customer satisfaction scoring mechanism as approved by SSC.	Develop a Customer satisfaction scoring mechanism to measure SSC satisfaction with Service Desk services being provided.
As required, prepare Root Cause Analysis report (see ANNEX A SOW: Appendix D Section 2.3 Problem Escalation for Service Level Failure) for review at Ad Hoc Service Management Committee Meeting (see ANNEX A SOW: Appendix C Section 1.0 Governance Model).	QUALITY ASSURANCE ANALYST Provide Service Provider with monthly EUSD Customer Satisfaction Survey for results for inclusion in report of measured level of performance against SLA target for prior month for EUSD.	Work with the performance measurement group and incident management group in the processing and management of customer satisfaction surveys or feedback.
As required, prepare Corrective Action Plan (see ANNEX A SOW: Appendix D Section 2.3 Problem Escalation for Service Level Failure).	QUALITY ASSURANCE ANALYST Provide Service Provider with quality assurance scores for agents/administrators for inclusion in report of measured level of performance against SLA target for prior month for EUSD and ESD.	Approve satisfaction scoring mechanism developed.
As required, implement Corrective Action Plan (see ANNEX A SOW: Appendix D Section 2.3 Problem Escalation for Service Level Failure) and provide progress reports at bi-weekly Business Touch Base (see ANNEX A SOW: Appendix C Section 1.0 Governance Model) .	DOMAIN LEAD Solicit feedback based on comments left in end user satisfaction surveys for potential service improvements.	-

5.14. Resource Performance Assurance

Objective: ensure adherence to resource performance assurance process (ANNEX A SOW: Appendix F Resource Performance Assurance) that systematically monitors Agent/Administrator performance against expectations, identifies opportunities for improvement and directs coaching / training efforts where they are needed.

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
-	<p>CLIENT DELIVERY EXECUTIVE Manage the service delivery performance for all delivered services.</p>	Provide strategic planning and final direction with respect to both the current services delivered and any services that will be delivered in the future.
-	<p>SERVICE DELIVERY MANAGER Work with SSC Managers to investigate Problematic Interactions.</p>	<p>MANAGER Work with Service Delivery Manager to investigate Problematic Interactions.</p>
-	<p>SERVICE DELIVERY MANAGER Provide expertise and guidance with regards to overseeing operations providing Service Desk support.</p>	-
-	<p>SERVICE DELIVERY MANAGER Develop and implement performance monitoring processes to ensure quality service is provided and productivity targets are met or exceeded.</p>	-
-	<p>TEAM LEAD Oversee Service Desk personnel training, mentoring and coaching to ensure compliance with performance standards for:</p> <ul style="list-style-type: none"> <li>i. call etiquette;</li> <li>ii. system access;</li> <li>iii. creating, triaging and closing (tickets);</li> <li>iv. linking call records to tickets;</li> <li>v. referencing change requests;</li> <li>vi. escalation procedures;</li> <li>vii. password resets;</li> <li>viii. contingency plans;</li> <li>ix. standard Service Desk procedures;</li> <li>x. knowledges base management and known error Database; and</li> <li>xi. conduct auxiliary (quality assurance) audits;</li> </ul>	-
-	<p>QUALITY ASSURANCE ANALYST Conduct formal monthly quality assurance audits on agents/administrators using the sample methodology detailed in ANNEX A SOW: Appendix F Section 3.1.1 Formal Audits and the evaluation based on the scoring methodology described in ANNEX A SOW : Appendix F Section 3.3 Scoring.</p>	-

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
	<p style="text-align: center;">QUALITY ASSURANCE ANALYST</p> <p>Maintain log of all Problematic Interactions directed to their attention, including steps taken to investigate and follow-up action(s) undertaken as detailed in ANNEX A SOW: Appendix F Section 5.0 Problematic Interactions.</p>	
-	<p style="text-align: center;">TEAM LEAD</p> <p>Review daily all tickets for quality and compliance to documentation standards and administrative processing protocols.</p> <p>Constantly monitor and give feedback to Team Lead's assigned agents on their opened interactions and incidents. Reviewing for quality and compliance to documentation standards and administrative processing protocols with a focus on End User experience and improving agent interaction quality</p>	-
-	<p style="text-align: center;">TEAM LEAD</p> <p>Perform a quality assurance review for every call, based on a call back to the end user to confirm satisfaction. Constantly monitor and give feedback to Team Lead's assigned agents on their live phone calls/ chats. Reviewing for quality and compliance to documentation standards and administrative processing protocols with a focus on End User experience and improving agent call/ chat quality [align with Resource Performance Assurance]</p>	-
-	<p style="text-align: center;">TEAM LEAD</p> <p>Conduct ancillary quality assurance audits on agents/administrators using the sample methodology detailed in ANNEX A SOW: Appendix F Section 3.1.2 Ancillary Audits and the evaluation based on the scoring methodology described in ANNEX A SOW : Appendix F Section 3.3 Scoring.</p>	-
-	<p style="text-align: center;">TEAM LEAD</p> <p>Meet with lowest performing team members daily in accordance with the requirements described in ANNEX A SOW: Appendix F Section 4.2 Team Lead Follow-up / 4.3 Enduring Performance Issues.</p>	-
-	<p style="text-align: center;">TEAM LEAD</p> <p>Provide coaching to team members.</p>	-
-	<p style="text-align: center;">DOMAIN LEAD / TEAM LEAD</p> <p>Review Call Daily Report to identify operational issues and/or agents operating outside the normal range (see ANNEX A SOW: Appendix F Section 5.0).</p>	-

### 5.15. Workforce Management

Objective: ensure that deployment of In Scope Resources efficiently and effectively meets the respective demands of the ESD and EUSD (ANNEX A SOW Section 6.0 In Scope Resource Requirements).

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
Provide the capacity to increase staffing levels to handle unexpected call volume spikes.	SERVICE DELIVERY MANAGER Evaluate personnel and position them where they will be most effective to meet service level targets per the SOW.	Provide projected volume of interactions and related staffing level requirements.
Tracking, input of data and maintenance of Workforce/ employee pay system, timesheets.	SERVICE DELIVERY MANAGER Determine technical workload specifications (i.e. staffing levels) in relation to the Service Desk environment.	-
Provide a mechanism to track agent utilization for those personnel's who do not use a system that tracks agent state and/or time allocation.	SERVICE DELIVERY MANAGER Provide a weekend mechanism for the on-call resources to escalate issues.	-
Provide Workforce Management Tools	DOMAIN LEAD Maintain Service Desk staffing levels for planned and unplanned contact volume overflows (e.g. emergencies, enterprise application deployments etc.).	-
-	DOMAIN LEAD Take into account the peak volume periods caused by end user population imbalances and normal busy periods for end users, and provide appropriate staff levels to ensure quality of service is maintained.	-
-	OPERATIONS MANAGER Ensure that staffing levels for every shift reflect call volumes patterns.	-
-	OPERATIONS MANAGER Explain and demonstrate monthly the human resource usage based on workload and metrics. Report monthly on the resource requirement for each process based on workload. Demonstrate and report that quality thresholds each indicator for each process are met.	-

5.16. End User Service Desk Services

Objective: ensure that all cross functional elements are addressed in a manner that optimizes the delivery of core EUSD services (ANNEX A SOW Section 3.2 End User Service Desk Services) and request fulfilment (ANNEX A SOW Section 3.3 Request Fulfilment).

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
Adhere to all cross functional requirements described in ANNEX A SOW Section 5.0.	ALL IN SCOPE RESOURCES Adhere to approved processes relating to cross functional requirements described in ANNEX A SOW Section 5.0.	Ensure that all cross functional and core service requirements are clearly documented and understood by all parties.
-	ALL IN SCOPE RESOURCES Adhere to approved process relating to core EUSD services (see ANNEX A SOW Section 5.11 Processes/Procedures).	-

5.17. ESD Enterprise Services

Objective: ensure that all cross functional elements are addressed in a manner that optimizes the delivery of the core ESD enterprise services (ANNEX A SOW Section 4.2 Enterprise Services).

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
Adhere to all cross functional requirements described in ANNEX A SOW Section 5.0.	ALL IN SCOPE RESOURCES Adhere to approved processes relating to cross functional requirements described in ANNEX A SOW Section 5.0.	Ensure that all cross functional and core service requirements are clearly documented and understood by all parties.
-	ALL IN SCOPE RESOURCES Adhere to approved processes relating to core ESD services. (see ANNEX A SOW Section 5.11 Processes/Procedures).	-



5.18. Security

Objective: ensure adherence to all security requirements (ANNEX A SOW Section 2.5 Security Requirements).

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
Service Provider Personnel are prohibited from the accessing, communication, transfer, disclosure, retention, processing and management of the personal information that is under the stewardship of the SSC except for the purpose of carrying out the work required under the contract (see ANNEX A SOW Section 2.5 Security Requirements).	<p>ALL IN SCOPE RESOURCES</p> <p>All Service Provider Personnel, including but not limited to full-time and part-time employees, Service Providers, or any other resource having access to Canada’s confidential materials, systems and services must be cleared to the Reliability Status as defined by CISD/PSPC for personnel security screening (ANNEX A SOW Section 2.5 Security Requirements).</p>	-
The Service Provider must not utilize its Information Technology systems to electronically process, produce or store Protected B information unless the CISD/PSPC has approved its use. After approval has been granted or approved, these tasks may be performed up to the level of Protected B, <del>including an IT link up to the level of Protected B</del> (see ANNEX A SOW Section 2.5 Security Requirements).	<p>OPERATIONS MANAGER</p> <p>Immediately report any security breaches such as, but not limited to, reports of viruses to the appropriate authority according to procedure.</p>	-
-	<p>OPERATIONS MANAGER</p> <p>Communicate and work with the Security group to remain informed on any security issue.</p>	-
-	<p>OPERATIONS MANAGER</p> <p>Control building security access to IT support staff and 3rd party vendors as per established procedures.</p>	-

### 5.19. Disaster Recovery and Business Continuity

Objective: ensure adherence to an approach to Business Continuity Planning and Disaster Recovery that meets the established requirements (ANNEX A SOW Section 2.1.3 Disaster Recovery and Business Continuity and Attachment 4.1 Technical criteria).

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
Propose an approach to Disaster Recovery and Business Continuity Planning ("DR & BCP Approach") which will include, but not be limited to, the establishment of policies and procedures with respect to workspace provisioning and resource deployment that addresses the minimum operational requirements detailed in ANNEX A SOW Section 2.1.3 Disaster Recovery and Business Continuity Planning.	Act as Service Provider single-point-of-contact in event of major system and environmental problems, such as: natural disaster, virus, etc.	Approve "DR & BCP Approach" proposed by the Service Provider
Document escalation procedures to be followed in the event that Service Desk personnel are unable to perform any part of their job functions because of system, communication, application availability, or other data centre or Service Provider site related problems.	Design, develop, document, and implement manual or backup procedures for Service Desk personnel to follow in the event that the Service Desk tools used to process end user contacts fail to operate properly.	Develop and maintain "integrated" availability contingency plans to ensure that they are kept current, complete and accurate.
Develop and maintain availability contingency plans for facility (and integrate into SSC overall Business Continuity / Disaster Recovery) to ensure that they are kept current, complete and accurate.	Execute availability contingency plans for critical systems when and as required.	-
Make resources available, at any time of the day and the week, to work with the technical authority to restore regular service in case of major system and environmental problems, such as: natural disaster, virus, etc.	Test and execute contingency plans for critical Service Desk functions and systems.	-
	Test any and all changes to availability contingency plans as well as participate in regular tests to ensure accuracy.	-

5.20. Projects

Objective: ensure that project work is undertaken with appropriate planning and oversight by the appropriate level of in Scope Resources.

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
-	SERVICE DELIVERY MANAGER Participate in and/or lead projects as required.	-
-	SERVICE DELIVERY MANAGER Liaise with various work units and personnel to determine resource requirements as necessary to complete project work.	-
-	SERVICE DELIVERY MANAGER Manage projects to ensure that milestones are met in accordance with project guidelines.	-

5.21. Transition-out

Objective: At the end of the Contract Period, the Service Provider must assist with the transition of the Domain to a new Service Provider. The Service Provider must cooperate with a new Service Provider to ensure that smooth and seamless transition of services occurs. The Service Provider must ensure that overall operational availability is not disrupted; existing service levels are maintained and Contract deliverables continue to be delivered while transition and knowledge transfer to a new Service Provider or to SSC staff occurs.

SERVICE PROVIDER	IN SCOPE RESOURCES	SHARED SERVICES CANADA
Allocate the necessary time to assist in one-on-one knowledge transfer to the incoming Service Provider.	ALL IN SCOPE RESOURCES Key resources must transfer this knowledge to the winning bidder's remaining contractor resources by the Contract Start Date.	-
Prepare and deliver detailed transition documentation for presentation to SSC to be utilized with the incoming Service Provider. The transition documentation and presentations must be provided for each function and sub-function within the Request for Proposal. The documentation must describe, in the necessary detail, all the pertinent and important details necessary for a successful transition to the incoming Service Provider.	CLIENT DELIVERY EXECUTIVE/SERVICE DELIVERY MANAGER Ensure that all documentation (i.e. operational, training, reporting, etc.) is up to date and accurate. Copies of all documentation must be provided within 2 working days on written request from SSC.	-
Prepare weekly Transition-Out reports.	SERVICE DELIVERY MANAGER Ensure operational checklists are maintained to current requirements and are complete and accurate. Copies of these checklists must be provided within 2 business days on written request from SSC.	-
Continue to meet existing Service Level Targets.	SERVICE DELIVERY MANAGER Ensure operational procedures are up to date and accurate.	-
All costs associated with the Transition shall be the responsibility of the Service Provider.	CLIENT DELIVERY EXECUTIVE/SERVICE DELIVERY MANAGER Continue to meet established operational service levels and targets.	-
Return all SSC Provided Assets to SSC.	-	-

## 6. In Scope Resource Requirements

This section details the In Scope Resources required to perform EUSD and ESD functions. Category descriptions and minimum requirements are detailed in ANNEX A SOW: Appendix A Category Descriptions.

The resource requirements detailed below represent the initial resource requirements. Post transition, SSC will provide a Resource Forecast on a three month rolling basis. The monthly staffing levels within the forecast will not vary more than 5% (with exception) from month-to-month for each Task Authorization. The first two months of the three month rolling forecast will be locked once SSC provides it to the Service Provider. The staffing level is to be maintained at 95% or higher than the Resource Forecast (see ANNEX A SOW: Appendix E Service Level Descriptions).

### 6.1. EUSD In Scope Resource Requirements

**Table 3: EUSD In Scope Resource Requirements**

IDENTIFIER	FUNCTION	CATEGORY	BASELINE QUANTITY
EUSD1.0	DOMAIN MANAGEMENT	CLIENT DELIVERY EXECUTIVE	0.7
EUSD2.0	DOMAIN MANAGEMENT	SERVICE DELIVERY MANAGER	1
EUSD3.0	DOMAIN MANAGEMENT	OPERATIONS MANAGER	0.7
EUSD4.0	DOMAIN MANAGEMENT	DOMAIN LEAD	2
EUSD5.0	DOMAIN MANAGEMENT	TRAINER	2
EUSD6.0	DOMAIN MANAGEMENT	QUALITY ASSURANCE ANALYST	2
EUSD7.0	DOMAIN MANAGEMENT	REPORTING ANALYST	2
EUSD8.0	DOMAIN MANAGEMENT	KNOWLEDGE MANAGEMENT	1
EUSD9.0	DOMAIN MANAGEMENT	IT TECHNICAL SUPPORT	1.4
EUSD10.0	CALL/CHAT MANAGEMENT	SERVICE DESK TEAM LEAD	7
EUSD11.0	CALL/CHAT MANAGEMENT	SENIOR SERVICE DESK AGENT	37
EUSD12.0	CALL/CHAT MANAGEMENT	INTERMEDIATE SERVICE DESK AGENT	37
EUSD13.0	CALL/CHAT MANAGEMENT	JUNIOR SERVICE DESK AGENT	17
EUSD14.0	REQUEST FULFILMENT	REQUEST FULFILMENT TEAM LEAD	2
EUSD15.0	REQUEST FULFILMENT	SENIOR ACCOUNT ADMINISTRATOR	10
EUSD16.0	REQUEST FULFILMENT	INTERMEDIATE ACCOUNT ADMINISTRATOR	10

## 6.2. ESD In Scope Resource Requirements

**Table 4: ESD In Scope Resource Requirements**

<b>IDENTIFIER</b>	<b>FUNCTION</b>	<b>CATEGORY</b>	<b>BASELINE QUANTITY</b>
ESD1.0	DOMAIN MANAGEMENT	CLIENT DELIVERY EXECUTIVE	0.3
ESD2.0	DOMAIN MANAGEMENT	SERVICE DESK MANAGER	1
ESD3.0	DOMAIN MANAGEMENT	OPERATIONS MANAGER	0.3
ESD4.0	DOMAIN MANAGEMENT	TRAINER	1
ESD5.0	DOMAIN MANAGEMENT	QUALITY ASSURANCE ANALYST	2
ESD6.0	DOMAIN MANAGEMENT	REPORTING ANALYST	2
ESD7.0	DOMAIN MANAGEMENT	IT TECHNICAL SUPPORT	0.6
ESD8.0	CALL/CHAT MANAGEMENT	SERVICE DESK TEAM LEAD	5
ESD9.0	CALL/CHAT MANAGEMENT	SENIOR SERVICE DESK AGENT	15
ESD10.0	CALL/CHAT MANAGEMENT	INTERMEDIATE SERVICE DESK AGENT	15
ESD11.0	CALL/CHAT MANAGEMENT	JUNIOR SERVICE DESK AGENT	10

## PART 2 INCIDENT MANAGEMENT / COORDINATION

### 1. Contract Terms

The follow terms will apply with respect to Incident Management / Coordination (IM):

#### 1.1. Location

All services will or can be delivered from the following locations:

- 350 King Edward, Ottawa, ON
- 715 Peel Street, Montreal, QUE

In the event of a disaster at the present location, the IM in scope resources shall be reassigned to a Disaster Recovery (“DR”) site within the National Capital Region (NCR) to resume operations until the situation is rectified, as per current SSC Business Continuity procedures.

SSC will provide the Service Provider with sufficient notice of any facility (or service delivery location) changes. Changes to the location will not trigger a change to pricing or other expenses. Bidders are expected to take this into consideration in their pricing responses.

#### 1.2. Workstations and Telephones

During the Contract period, SSC will provide workstations and mobile phones for the Service Provider’s in scope resources to use. When preparing their pricing submission, bidders are also encouraged to review APPENDIX H FINANCIAL RESPONSIBILITIES MATRIX for Service Provider responsibilities.

#### 1.3. Operating Hours

Incident Management / Coordination services must be provided on a 24 hours a day, 7 days a week, and 365 days a year including all holidays. There are some activities that are not required to be delivered on a 24 x7 basis and those can be delivered during the Government of Canada core business hours which are (07:00 to 17:00) Monday to Friday excluding federal statutory holidays.

**Table 5: Operating Hours for the Enterprise Command Centre**

CUSTOMER DEPARTMENT NAME	CORE BUSINESS HOURS	SATURDAYS AND SUNDAYS	FEDERAL STAT HOLIDAYS
Normal Activities	24 hours / 7 days a week / 365 days a year		
Select Activities	07:00 – 17:00 E.T.	N/A	N/A

#### 1.4. Language Requirements

The IM in scope resources are required to provide support services to users in the official language of their choice. Those support services, including all written and verbal communications, must be of equal quality and level of service in English and French, at all times.

#### 1.5. Security Clearance Requirements

All IM in scope resources must obtain security clearance: reliability status, and maintain security clearance: reliability status for the duration of their employment.

## 2. Current State Summary

Since 2010, SSC has outsourced certain incident management / coordination services. The contract with the current Service Provider is set to expire in Spring of 2025. Bidders should note that Government of Canada data currently resides in Canada and this mandatory requirement must be maintained throughout the duration of any subsequent contract.

The purpose of this description is to provide Proponents with context and is not intended to be an indication of how SSC would like to have their services delivered.

The Incident Coordination operates over multiple sites nationally on a 24/7/365 basis.

All SSC and Government of Canada data currently resides in Canada and this requirement must be maintained throughout the duration of the subsequent contract.

## 3. Service Descriptions

This section details the IM service requirements the bidders will be expected to include in their proposal and pricing. These services do not necessarily reflect what or how services are currently delivered by the current service provider.

The role of IM in scope resources will be to provide operational support to Shared Services Canada (SSC) Incident Coordination (IC). IM in scope resources will have the responsibility for coordinating the resolution of significant incidents that involve outages, performance degradation and or risk with SSC, and other technical support groups as needed. IM in scope resources must act as the primary contact between SSC and the Service Provider for resolution of these incidents. SSC will require the IM in scope resources to document, report, and coordinate the resolution of all incidents. This requires the IM in scope resources to isolate the incident, document it and determine the full impact of the incident, including the estimated number of users impacted. The IM in scope resources must send notifications to senior management and partner departments on the status of incidents. All communications and updates pertaining to the incident must be captured and documented within the ticket for reporting purposes. The IM in scope resources may be required to engage with other Third Parties for the purposes of investigation and resolution. SSC may request a written report that details the root cause, an analysis, and a procedure and/or plan for correcting incidents.

### 3.1. Incident Management / Coordination Functions

Incident Management / Coordination Services are activities relating to the provision of operational support and advice in the planning, development, implementation, integration and support of IT service management in support of service delivery to internal and external clients, and stakeholders, including:

- Performing the basic duties of the Incident Coordinator role. Heavy focus on high and critical incidents;
- Participating in discussions with colleagues, clients, technical advisors and managers to explain issues of a technical nature or to resolve technical issues;
- Maintaining knowledge of trends and developments in IT Service Management operations and practices;



- Accountability for the incident record throughout its lifecycle (incident detection, diagnosis, repair, recovery, restoration and resolution) according to the approved SSC OPS ITSM Incident Management (IM) process;
- Ensuring all activities are carried out as laid out by the approved SSC OPS ITSM IM process;
- Onsite authority for incident escalation during the incident lifecycle and performs incident escalation according to approved escalation framework when necessary;
- Escalating Critical priority incidents to the Major Incident Coordinator; Authority for assessment and determination of incident priority;
- Monitoring the status and progress towards resolution of assigned incident records;
- Conducting continuous reassessment of the business impact and/or urgency of all active incidents according to SSC Incident Management Priority Matrix; Issues the incident notification (INOT), (initial, updates, and resolution via the incident notification template) to the SSC IT community and impacted Partner First Line Support (PFLS) for High and Critical priority incidents or when service restoration activities may impact other services;
- Performing active monitoring of all High and Critical priority incidents to ensure technical updates (i.e. service restoration activities) are being provided as per established timelines;
- Following-up with Service Support Resource (SSR) to obtain an incident record update when necessary. Escalating the incident to technical managers or directors as required;
- Actively monitoring all critical and high priority incidents to ensure that required management escalation and notification is performed (based on updates provided by the Major Incident Coordinator);
- During High priority incidents, taking a leadership role in resolving the incident in a timely manner by:
  - Coordinating discussions between multiple support groups by initiating and chairing a technical conference call;
  - Performing Functional (technical) escalation to support management;
  - Performing Hierarchical (management) escalation;
  - Engaging additional resources;
- Acting as the Client Executive (CE) single point of contact for information, escalation and resolution for all priorities;
- Confirming service restoration with the Incident Reporter;
- Performing Quality Control on all High and Critical priority incidents and a portion of medium and low priority;
- Acquiring and maintaining intimate knowledge of Critical Business Applications and Services (CBAS) and Designated Site lists;
- Closing all resolved Critical and High priority incident records (Low and medium priority incident records are closed automatically after 10 days); and
- Attending post-incident reviews when required.

#### 4. In Scope Resource Requirements

This section details the In Scope Resources required to perform Incident Management / Coordination functions. Category descriptions and minimum requirements are detailed in ANNEX A SOW: Appendix A Category Descriptions.

4.1. Incident Management / Coordination In Scope Resource Requirements

**Table 6: IM In Scope Resource Requirements**

<b>IDENTIFIER</b>	<b>FUNCTION</b>	<b>CATEGORY</b>	<b>BASELINE QUANTITY</b>
IM1.0	INCIDENT CO-ORDINATION	ESD LEVEL 1.5 / SENIOR SERVICE DESK AGENT	10
IM2.0	INCIDENT CO-ORDINATION	SENIOR INCIDENT CO-ORDINATOR	6
IM3.0	INCIDENT CO-ORDINATION	JUNIOR INCIDENT CO-ORDINATOR	6

## PART 3 ENTERPRISE COMMAND CENTRE

### 1. Contract Terms

The follow terms will apply with respect to Enterprise Command Centre (ECC) services:

#### 1.1. Location

All services will or can be delivered from the following locations:

- MCDC - 1600 Tom Roberts Rd., Ottawa, ON
- 2300 St. Laurent Blvd., Ottawa, ON

In the event of a disaster at one of the present locations, the key operations of the ECC resources shall be reassigned to a Disaster Recovery (“DR”) site within the National Capital Region (NCR) to resume operations until the situation is rectified, as per current SSC Business Continuity procedures.

SSC will provide the Service Provider with sufficient notice of any facility (or service delivery location) changes. Changes to the location will not trigger a change to pricing or other expenses. Bidders are expected to take this into consideration in their pricing responses.

#### 1.2. Workstations and Telephones

During the Contract period, SSC will provide workstations and mobile phones for the Service Provider’s resources to use. When preparing their pricing submission, bidders are also encouraged to review APPENDIX H FINANCIAL RESPONSIBILITIES MATRIX for Service Provider responsibilities.

#### 1.3. Operating Hours

ECC event management services must be provided on a 24 hours a day, 7 days a week, and 365 days a year including all holidays. There are some activities that are not required to be delivered on a 24 x7 basis and those can be delivered during the Government of Canada core business hours which are (07:00 to 17:00) Monday to Friday excluding federal statutory holidays.

**Table 7: Operating Hours for the Enterprise Command Centre**

CUSTOMER DEPARTMENT NAME	CORE BUSINESS HOURS	SATURDAYS AND SUNDAYS	FEDERAL STAT HOLIDAYS
Normal Activities	24 hours / 7 days a week / 365 days a year		
Select Activities	07:00 – 17:00 E.T.	N/A	N/A

#### 1.4. Language Requirements

There is no bilingual requirement for the ECC resources.

#### 1.5. Security Clearance Requirements

All ECC resources must obtain Level II Secret Government of Canada security clearance, and maintain Level II Secret security clearance for the duration of their employment. The ECC requires 100% Secret security clearance for its resources.

## 2. Current State Summary

Since 2013, SSC has outsourced their ECC and Direct Operations functions to a Services Provider (“SP”). The contract with the SP is set to expire on June 2025.

The purpose of this description is to provide Proponents with context and is not intended to be an indication of how SSC would like to have their services delivered.

The SP was selected through competitive tender and operates under a contracting framework that provides SSC with the required qualified resources. The Service Provider is providing resources, with some Government of Canada employees providing overall guidance and service management functionality.

All SSC and Government of Canada data currently resides in Canada and this requirement must be maintained throughout the duration of the subsequent contract.

### 2.1. Enterprise Command Centre Overview

The ECC division of the Service Management Operations and Transformation (SMO&T) Directorate is responsible for monitoring the health and well-being of all SSC IT Services and Configuration Items. Through the use of monitoring, the ECC identifies potential and actual problems with SSC’s IT services environment. When alerted of an issue, the ECC will investigate and, where required act, as quickly as possible to manage the event by taking appropriate corrective action or by engaging other support groups to do so, to minimize or avoid an issue that may affect the delivery of SSC's services to its customers.

The ECC operates over multiple sites nationally, providing command and control functionality on a 24/7/365 basis.

In addition to monitoring, the ECC's Enterprise Monitoring Support and Operations (ESMO) team, supports the ECC’s mandate of operating SSC’s Event Management service. EMSO provides an end-to-end service for the ECCs from onboarding monitoring services to technical support and innovation.

## 3. Service Descriptions

This section details the ECC service requirements the bidders will be expected to include in their proposal and pricing. These services do not necessarily reflect what or how services are currently delivered by the current service provider.

### 3.1. Service Management Functions

Service Management Functions Services are activities that the Service Provider must perform across all functional ECC areas.

Where there is an impact or interaction with SSC, the Service Provider is expected to deliver the ECC services using industry standard methodologies and market best practices. SSC may request documentation that provides proof of this. The Service Provider will be expected to follow relevant SSC policies and procedures.

### 3.2. Event Management Mainframe Function

The ECC - NCR Mainframe team is responsible for:

- Mainframe batch processing;
- Mainframe Infrastructure monitoring using automation tools;
- Troubleshooting, fault isolation and service recovery;
- Escalation to services lines in order to address infrastructure incidents/problems beyond the scope of the ECC-NCR mainframe;
- Proper documentation and incident management using ITIL best practices;
- Responsible for logging all events into the proper incident management tool;
- Responsibilities include triage and prioritization of events that are logged into the ITSM incident management tool;
- Engage the IC (Incident Coordination) team in order for them to take over the INOT/RNOT process; and
- Support the infrastructure mainframe platform.

### 3.3. Event Management Network and Midrange Function

The ECC - NCR Network & Mid-Range team is responsible for:

- Monitoring of the PKI Infrastructure;
- Monitoring of Windows, Unix, HP Unix etc. servers;
- Triage, remediation and escalation of events;
- Monitoring network for loss of connection. Remediation and escalations of event;
- Monitoring WAN and LAN devices and servers for public facing services;
- Monitoring of data centre and applications;
- Windows/Linux enterprise server monitoring;
- Monitoring of the enterprise networking firewalls, switches etc.; and
- Monitoring of the CI's in the end-state data centres at Barrie and EDC Gatineau.

## 4. In Scope Resource Requirements

This section details the In Scope Resources required to perform ECC functions. Category descriptions and minimum requirements are detailed in ANNEX A SOW: Appendix A Category Descriptions.

### 4.1. ECC In Scope Resource Requirements

**Table 8: ECC In Scope Resource Requirements**

IDENTIFIER	FUNCTION	CATEGORY	BASELINE QUANTITY
ECC1.0	DOMAIN MANAGEMENT	OPERATIONS DOMAIN MANAGER	1
ECC2.0	EVENT MANAGEMENT	ECC EVENT MANAGEMENT SENIOR OPERATOR	3
ECC3.0	EVENT MANAGEMENT	ECC EVENT MANAGEMENT INTERMEDIATE OPERATOR	3
ECC4.0	EVENT MANAGEMENT	ECC EVENT MANAGEMENT JUNIOR OPERATOR	2
ECC5.0	EVENT MANAGEMENT	ECC EVENT MANAGEMENT SENIOR TECHNICAL ADVISOR	1
ECC6.0	EVENT MANAGEMENT	ECC EVENT MANGEMENT INTERMEDIATE ADVISOR	1

## APPENDIX A – CATEGORY DESCRIPTIONS

## 1. Client Delivery Executive

ROLE	Oversees delivery of the contract.
MINIMUM REQUIREMENTS	10 years of experience in developing and monitoring of Service Desk action plans, policies, and guidelines.
	10 years of experience in the analysis and engineering of Information Technology processes to optimize operations.
	10 years of experience in analysis of Service Desk reports to ensure service objectives are met such as overall satisfaction and service levels are being met and to address Service Desk delivery issues.
	10 years of experience in customer relationship management with government departments or large private sector organizations with over 5,000 resources.
	7 years of Project Management experience and valid certification.
	Security Clearance: Reliability Status.

## 2. Service Delivery Manager

ROLE	Manages daily operations and the coordination of staff. Single point of contact for day-to-day service delivery and ensures performance and quality of service is met.
MINIMUM REQUIREMENTS	7 years of experience in the management of IM/IT service desks, teams, budgets and contracts in a Government or large corporate environment of 5,000 or more end users.
	7 years of experience producing and implementing comprehensive Monthly Action Plans (“MAP”) for Service Desk optimization such as: <ul style="list-style-type: none"> <li>i. Service Desk metrics;</li> <li>ii. implementation of Service Desk process improvements;</li> <li>iii. training gaps; and</li> <li>iv. service expectations.</li> </ul>
	7 years of experience defining technical specification workload estimates in relation to Service Desk services.
	7 years of experience ensuring that the Service Level Targets are met and that those missed are documented.
	7 years of experience in monitoring and testing contingency plans for critical Service Desk systems.
	7 years of experience providing Information Technology technical support services in client operating systems, networks operating software or commercial-off the-shelf (COTS) office products such as MS Office. Technical support can include such as password resets, hardware issues related to damaged peripherals, software related issues such as non-responding applications, identification of security incidents such as viruses and malware security incidents such as viruses and malware.
	7 years of experience providing expertise and guidance with regards to a Service Desk environment for Service Desk functions related to workstations, server and client environments.
	7 years of experience implementing corrective actions in a call centre environment related to call, incident, problem and change management and escalation processes.
	7 years of experience reviewing service management status reports including data related to quality assurance, daily and weekly call statistics, issue/problem resolutions.
	7 years of experience in the analysis of IT Service Desk workload reporting to determine process improvements in areas such as call resolution, customer service.
	Security Clearance: Reliability Status.

### 3. Operations Manager

ROLE	Manages IT hardware, materials requirements, personnel and work environment health and safety. Single point of contact for workforce management (including recruitment, training, agent development, agent performance remediation) and Remote Work Agreement compliance.
MINIMUM REQUIREMENTS	2 years of experience in the operations management role.
	2 years of experience performing vendor management.
	2 years of experience in labour relations and human resource management.
	2 years of experience managing a distributed workforce.
	5 years of experience providing Information Technology technical support services in a client operating environment.
	Security Clearance: Reliability Status.

### 4. Domain Lead

ROLE	Supervises employees and oversees operation of the Service Desk.
MINIMUM REQUIREMENTS	5 years of experience providing Information Technology technical support services in client operating systems, networks operating software, or commercial-off the-shelf (“COTS”) office products (MS Office). Technical support can include such as password resets, hardware issues related to damaged peripherals, software related issues such as non-responding applications, identification of security incidents such as viruses and malware.
	5 years of experience in the management of IT projects and teams.
	5 years of experience implementing Management Action Plans (“MAP”) in a Service Desk environment such as: i. Service Desk metrics; ii. implementation of Service Desk process improvements; and iii. client service expectations.
	5 years of experience providing expertise and guidance with regards to a Service Desk environment for Service Desk functions related to workstations, server and client environments.
	5 years of experience implementing corrective actions in a call centre environment related to call, incident, problem and change management and escalation processes.
	5 years of experience determining technical workload specifications in relation to the Service Desk environment.
	5 years of experience reviewing service management status reports including data such as quality assurance, daily and weekly call statistics, issue/problem resolutions.
	5 years of experience in the analysis of IT Service Desk workload reporting to determine process improvements in areas such as call resolution, customer service.
	5 years of experience in the provision of IT support client services within an IT environment for a Government or large corporate environment of 5,000 or more end users.



## 5. Trainer

ROLE	Develops training curriculum and is responsible for intake training and on-going resource development.
MINIMUM REQUIREMENTS	3 years of experience creating, maintaining and continually evolving training material to support role based processes, tasks, and Standard Operating Procedures.
	3 years of experience planning, designing, and implementing interactive training activities.
	3 years of experience managing training material within a Service Desk Knowledge Database or document repository.
	3 years of experience monitoring training compliance and continuous improvement and preparing periodic reports to communicate outcomes of training activities.
	3 years of experiencing collecting and assessing feedback on effectiveness of training activities.
	Security Clearance: Reliability Status.

## 6. Quality Assurance Analyst

ROLE	Reviews the quality of a percentage of tickets, and provides feedback to the agent.
MINIMUM REQUIREMENTS	4 years of experience in providing quality assurance in a Service Desk environment in preparing things like quarterly reports on findings, deficiencies, degradation, problems with existing processes, procedures, Service Desk Agents and recommended corrective measures and/or improvements.
	4 years of experience with an enterprise class IT Service Management record, prioritize, match against other tickets in the system , track, document, assign and close call/incident, problem and IMAC/change tickets.
	4 years of experience working with an Automatic Call Distribution telephony system to log in and out, set status, generate reports as required.
	4 years of experience in the analysis of quality assurance data related to a Service Desk environment such as the effectiveness and performance of all service desk tasks.
	4 years of experience in the use of business intelligence tools for quarterly samples tickets (calls taken and problem number assigned) and reports detailing Service Desk Agent resolution rates of problems.
	4 years of experience in tracking of quarterly samples tickets (calls taken and problem number assigned) and reports on the Service Desk's quality of Service Requests.
	4 years of experience producing reports for a Service Desk environment such as on the integrity and day-to-day procedures of the Service Desk indicating where the quality of work has degraded, maintained, or improved.
	4 years of experience producing documentation related to collection of metrics such as problem resolutions and request processing.
	Security Clearance: Reliability Status.

## 7. Reporting Analyst

ROLE	Gathers and performs analysis on statistical data and generates reports on Service Desk performance.
MINIMUM REQUIREMENTS	4 years of experience producing reports for a Service Desk environment such as overall expertise, knowledge and performance levels for each specific area of expertise, such as Service Desk Agents (“SDA”) for call, incident, problem, change, as well as Account Administrator (“AA”), Task Flow Controller (“TFC”) and change requests.
	4 years of experience in the use of business intelligence tools for tracking workload metrics on calls, incidents, problems and changes on a daily, weekly, monthly and quarterly basis.
	4 years of experience in tracking of metrics related to a Service Desk environment such as metrics and volumetric that demonstrate optimal performance of Problem resolution and request processing.
	4 years of experience producing documentation related to collection of metrics such as weekly activity statistics, call metrics, service management metrics, monthly resource requirements based on workload, SLA obligations.
	Security Clearance: Reliability Status.

## 8. Knowledge Management

ROLE	Develops the knowledge management strategy, ensures the on-going development, maintenance and quality of the knowledge base and is responsible for initiating knowledge base reviews at regular intervals.
MINIMUM REQUIREMENTS	2 years of experience writing technical documents.
	2 years of experience maintaining Training, Knowledge Base, Best Practice Tips, FAQs, trouble-shooting guides, “How To’s”, and other publication sources in Self-Help.
	2 years of experience conducting reviews of knowledge articles to ensure accuracy, relevance and consistency.
	2 years of experience working collaboratively with subject matter experts to gather, validate and update the technical content of the knowledge base.
	4 years of experience providing Information Technology technical support services in a client operating environment.
	Security Clearance: Reliability Status.

## 9. IT Technical Support

ROLE	Provides technical support for all hardware, network infrastructure, security and software applications utilized by Service Desk resources.
MINIMUM REQUIREMENTS	2 years of experience providing guidance and technical support in a service desk environment.
	2 years of experience performing diagnoses and identifying technical issues.
	4 years of experience providing Information Technology technical support services in a client operating environment.
	Security Clearance: Reliability Status.

### 10. Service Desk Team Lead

ROLE	Provides direction, instructions, coaching and guidance to a group of individuals.
MINIMUM REQUIREMENTS	5 years of experience working with an enterprise class IT Service Management tool, record, prioritize, match against other tickets in the system , track, document, assign and close Service Request I/incident, problem and IMAC/change tickets.
	5 years of experience providing Information Technology technical support services in client operating systems, networks operating software or commercial-off the-shelf (“COTS”) office products. Technical support can include such as password resets, hardware issues related to damaged Peripherals, software related issues such as non-responding applications, identification of security incidents such as viruses and malware of security incidents such as viruses and malware.
	5 years of experience interacting with different levels of IT technical support groups such as to resolve support issues, participate in projects.
	5 years of experience leading a team of professionals in the delivery of IT services such as: i. call management; ii. on-line support; iii. problem and incident management; and iv. escalation.
	5 years of experience working with Interactive Voice Response (IVR) telephony systems sending messages and implementing surveys.
	5 years of performing the setup and execution of broadcast messages to agents about system updates, important announcements, or urgent issues that require their attention.
	5 years of experience in the documentation of technical IT solutions.
	5 years of experience providing coaching to IT clients and team members.
	Security Clearance: Reliability Status.

### 11. Senior Service Desk Agent

ROLE	Acts as a point of contact for internal escalation related to issues that Service Desk Agents are unable to resolve. Specializes in processes and procedures in a specific stream. Answers calls/chats, performs basic troubleshooting, and attempts first-call resolution.
MINIMUM REQUIREMENTS	5 years of experience working with an enterprise class IT Service Management tool to open, record, prioritize, match against other tickets in the system , track, document, assign and close Service Request I/incident, problem and IMAC/change tickets.
	5 years of experience providing Information Technology technical support services in client operating systems, networks operating software or commercial-off the-shelf (COTS) office products Technical support can include such as password resets, hardware issues related to damaged Peripherals, software related issues such as non-responding applications, identification of security incidents such as viruses and malware.
	5 years of experience working with an Automatic Call Distribution telephony system log in and out, set status, generate reports as required.
	5 years of experience providing coaching/mentoring to team members in an IT environment.
	Security Clearance: Reliability Status.

## 12. Intermediate Service Desk Agent

<b>ROLE</b>	Answers calls/chats, performs basic troubleshooting, and attempts first-call resolution.
<b>MINIMUM REQUIREMENTS</b>	3 years of experience providing Information Technology technical support services in client operating systems, networks operating software or commercial-off the-shelf (COTS) office products. Technical support can include such as password resets, hardware issues related to damaged Peripherals, software related issues such as non-responding applications, identification of security incidents such as viruses and malware.
	3 years of experience working with an enterprise class IT Service Management tool to open, record, prioritize, match against other tickets in the system , track,, document, assign and close service request l/incident, problem and change tickets.
	3 years of experience working with an Automatic Call Distribution telephony system to log in and out, set status, generate reports as required.
	Security Clearance: Reliability Status.

## 13. Junior Service Desk Agent

<b>ROLE</b>	Answers calls/chats, performs basic troubleshooting, and attempts first-call resolution.
<b>MINIMUM REQUIREMENTS</b>	2 years of experience or an acceptable combination of education, training, and/or experience providing Information Technology technical support services in client operating systems, networks operating software or commercial-off the-shelf (“COTS”) office products Technical support can include password resets, hardware issues related to damaged Peripherals, software related issues such as non-responding applications, identification of security incidents such as viruses and malware.
	2 years of experience OR an acceptable combination of education, training, and/or experience working with an enterprise class IT Service Management tool to open, record, prioritize, match against other tickets in the system , track,, document, assign and close service Request l/incident, problem and/change tickets.
	1 years of experience working with an Automatic Call Distribution telephony system to log in and out, set status, generate reports as required.
	Security Clearance: Reliability Status.

### 14. Request Fulfillment Team Lead

ROLE	Provides direction, instructions, and guidance to a group of individuals. Experienced resource acting as a point-of-contact for escalations related to issues that Account Administrators are unable to resolve. Also knowledgeable in processes and procedures for a given stream. Performs complex account administration tasks and system maintenance as well as resolving incidents resulting from activities previously performed.
MINIMUM REQUIREMENTS	5 years of experience providing technical support in an IT environment.
	5 years experience overseeing the end-to-end process of request fulfillment.
	5 years of experience coordinating with other departments and teams to ensure timely and accurate completion of requests.
	5 years of experience serving as a point of contact for escalations and complex issues.
	5 years of experience communicating effectively with team members, stakeholders, and other relevant parties.
	5 years of experience monitoring team performance and key performance indicators (KPIs).
	5 years of experience implementing strategies to improve team efficiency and effectiveness.
	5 years of experience leading/coaching a team of professionals in the delivery of IT services.
	Security Clearance: Reliability Status.

### 15. Senior Account Administrator

ROLE	Experienced resource acting as a point-of-contact for escalations related to issues that Account Administrators are unable to resolve. Also knowledgeable in processes and procedures for a given stream. Performs complex account administration tasks and system maintenance as well as resolving incidents resulting from activities previously performed.
MINIMUM REQUIREMENTS	5 years of experience providing technical support in an IT environment.
	5 years of experience in providing account administration services in Microsoft Active Directory.
	5 years of experience working with an enterprise-class IT Service Management tool.
	Security Clearance: Reliability Status.

### 16. Intermediate Account Administrator

ROLE	Performs complex account administration tasks and system maintenance as well as resolving incidents resulting from activities previously performed.
MINIMUM REQUIREMENTS	3 years of experience providing technical support in an IT environment.
	3 years of experience providing account administration services in Microsoft Active Directory.
	3 years of experience working with an enterprise-class IT Service Management tool.
	Security Clearance: Reliability Status.

### 17. ESD Level 1.5 Senior Service Desk Agent

ROLE	Acts as a point of contact for internal escalation related to issues that Service Desk Agents are unable to resolve. Specializes in processes and procedures in a specific stream. Answers calls/chats, performs basic troubleshooting, and attempts first-call resolution.
MINIMUM REQUIREMENTS	5 years of experience working with an enterprise class IT Service Management tool to open, record, prioritize, match against other tickets in the system , track, document, assign and close Service Request I/incident, problem and IMAC/change tickets.
	5 years of experience providing Information Technology technical support services in client operating systems, networks operating software or commercial-off the-shelf (COTS) office products Technical support can include such as password resets, hardware issues related to damaged Peripherals, software related issues such as non-responding applications, identification of security incidents such as viruses and malware.
	5 years of experience working with an Automatic Call Distribution telephony system log in and out, set status, generate reports as required.
	5 years of experience providing coaching/mentoring to team members in an IT environment.
	Security Clearance: Reliability Status

### 18. Incident Management Senior Incident Co-ordinator

ROLE	Experienced resource acting as the primary contact between SSC and the Service Provider for resolution of reported incidents. Will act as the onsite authority for incident escalation during the incident lifecycle and will perform incident escalation according to an approved escalation framework when necessary. Will have excellent communication skills and a strong background in Information Technology concepts and understand IT Service Management and Service Operations best practices. Will be required to work independently and co-operatively to conduct current incident analysis, gather incident details, engage service resources, participate in technical conferences.
MINIMUM REQUIREMENTS	5 years of experience coordinating the resolution of significant incidents that involved outages, performance degradation and or risk in an IT environment.
	5 years of experience having accountability for the incident record throughout its lifecycle (incident detection, diagnosis, repair, recovery, restoration and resolution) according to the approved SSC OPS ITSM Incident Management (IM) process.
	5 years of experience working with an enterprise-class IT Service Management tool.
	Strong knowledge of ITIL processes and procedures.
	Security Clearance: Reliability Status.

### 19. Incident Management Junior Incident Co-ordinator

ROLE	Coordinates the resolution of significant incidents that involve outages, performance degradation and or risk with SSC, and invokes other technical support groups as needed. Will have strong communication skills and strong background in Information Technology concepts and understand IT Service Management and Service Operations best practices
MINIMUM REQUIREMENTS	2 years of experience coordinating the resolution of significant incidents that involved outages, performance degradation and or risk in an IT environment.
	2 years of experience having accountability for the incident record throughout its lifecycle (incident detection, diagnosis, repair, recovery, restoration and resolution) according to the approved SSC OPS ITSM Incident Management (IM) process.
	2 years of experience working with an enterprise-class IT Service Management tool.
	Strong knowledge of ITIL processes and procedures.
	Security Clearance: Reliability Status.



## 20. ECC Operations Domain Manager

<p>ROLE</p>	<p>The Operations Domain Manager manages the day-to-day operation of a designated Function(s) or responsibility area. They are the single point of contact for day-to-day service delivery within responsibility area, and are responsible for the performance, service quality and customer satisfaction of the services delivered within a designated Function(s) or responsibility area. They identify and implement opportunities to improve service and reduce cost, and ensure all service delivery commitments are met or exceeded. They must provide leadership, direction, and technical support to a designated Function(s) or responsibility area.</p>
<p>MINIMUM REQUIREMENTS</p>	<p>5 years of management experience in IT service delivery in a data centre environment.</p> <p>Within the last 8 years, the resource must have:</p> <ul style="list-style-type: none"> <li>• Experience analysing and re-engineering existing business processes to optimize IT operations;</li> <li>• Experience in developing and monitoring high level plans, policies and guidelines;</li> <li>• Experience communicating IT operational plans and strategies with technical staff, nontechnical staff and senior management in written and oral presentation formats; and</li> <li>• Experience managing an IT support team of at least 15 resources for a continuous period of at least 1 year.</li> </ul> <p>Valid Canadian Federal Government Security Clearance: Secret.</p>
<p>MUST MEET AT LEAST 7 OF THE FOLLOWING REQUIREMENTS</p>	<ul style="list-style-type: none"> <li>✓ Manage complex IT operations environments (multiple software and hardware platforms) on at least 2 projects</li> <li>✓ Manage hardware, software and/or service integration</li> <li>✓ IT project management on at least 3 projects</li> <li>✓ Provide advice and guidance on the mapping of business to operational requirements</li> <li>✓ Provide advice, guidance and document recommendations for modifying or implementing service delivery programs</li> <li>✓ ITIL Foundation certification (v.2 or higher)</li> <li>✓ IT service cost estimating related to IT operations service support and delivery</li> <li>✓ Architecting or designing IT solutions</li> <li>✓ Recommending and implementing process improvements or cost savings solutions in an IT operations environment</li> <li>✓ Experience working with Treasury Board Enhanced Management Framework (EMF)</li> </ul>



## 21. ECC Event Management Senior Operator

ROLE	<p>The Event Management Senior Operator is responsible for in depth support of operating server systems including performing DASD dumps, and system IPLs. They must perform first and second level troubleshooting for server, mainframe, network, batch processing and IT infrastructure related incidents. They are responsible for analyzing Problems and incidents to determine root cause and assist in providing solutions to prevent reoccurrence. They must monitor mainframe, server and network systems and console software and utilities. They must also update and maintain operational documentation and procedures. The main objective of the Senior Operator is to provide guidance and direction for the intermediate and junior operators and triage more complex incidents and event management issues.</p>
MINIMUM REQUIREMENTS	<p>4 years of experience working in IT Operations in a data centre environment.</p> <p>Within the last 8 years, the resource must have:</p> <ul style="list-style-type: none"> <li>• Experience in mainframe, server or network system monitoring;</li> <li>• Experience in using incident and Change management processes including inputting or updating information into event, incident and change management systems; and</li> <li>• Experience in IT Technical investigation, analysis and providing support.</li> </ul> <p>Valid Canadian Federal Government Security Clearance: Secret.</p>
MUST MEET AT LEAST 8 OF THE FOLLOWING REQUIREMENTS	<ul style="list-style-type: none"> <li>✓ Operate mainframe, server computers, or networking infrastructures</li> <li>✓ Experience in mainframe, server or network monitoring</li> <li>✓ Experience in using Event, incident and Change management processes including inputting or updating information into event, incident and change management systems</li> <li>✓ Experience in mainframe batch processing</li> <li>✓ Create, update, and implement operational procedures and/or checklists</li> <li>✓ Experience in using system performance or diagnostic tools</li> <li>✓ Performing system IPLs or server reboots</li> <li>✓ Troubleshooting problems and issues in Mainframe, Server or Network environment</li> <li>✓ Online Regions (CICS, DB2, IDMS, WEBSPHERE)</li> <li>✓ Batch Processing (CA-7, CONTROL-M, TWS)</li> <li>✓ Experience in using system Monitoring or Automation tools(</li> <li>✓ Communication tools (Telnet, or Remote Desktop Connection, or equivalent)</li> <li>✓ Reading, understanding and identifying components of a network topology diagram</li> </ul>

## 22. ECC Event Management Intermediate Operator

ROLE	The Event Management Intermediate Operations is responsible for operating server systems including performing DASD dumps, and system IPLs. They must perform first level troubleshooting for server, mainframe, network, batch processing and IT infrastructure related incidents. They are responsible for assisting in analyzing Problems and incidents to determine root cause and assist in providing solutions to prevent reoccurrence. They must monitor mainframe, server and network systems and console software and utilities. They must also update and maintain operational documentation and procedures.
MINIMUM REQUIREMENTS	2 years of experience working in IT Operations in a data centre environment.
	Within the last 8 years, the resource must have:
	<ul style="list-style-type: none"> <li>• Experience in mainframe, server or network system monitoring;</li> </ul>
	<ul style="list-style-type: none"> <li>• Experience in using incident and Change management processes including inputting or updating information into incident and change management systems; and</li> <li>• Experience in IT Technical investigation, analysis and providing support.</li> </ul>
MUST MEET AT LEAST 8 OF THE FOLLOWING REQUIREMENTS	Valid Canadian Federal Government Security Clearance: Secret.
	<ul style="list-style-type: none"> <li>✓ Operate mainframe, server computers, or networking infrastructures</li> <li>✓ Experience in mainframe, server or network monitoring</li> <li>✓ Experience in using Event, incident and Change management processes including inputting or updating information into event, incident and change management systems</li> <li>✓ Experience in mainframe batch processing</li> <li>✓ Create, update, and implement operational procedures and/or checklists</li> <li>✓ Experience in using system performance or diagnostic tools</li> <li>✓ Performing system IPLs or server reboots</li> <li>✓ Troubleshooting problems and issues in Mainframe, Server or Network environment</li> <li>✓ Online Regions (CICS, DB2, IDMS, WEBSHERE)</li> <li>✓ Batch Processing (CA-7, CONTROL-M, TWS)</li> <li>✓ Experience in using system Monitoring or Automation tools</li> <li>✓ Communication tools (Telnet, or Remote Desktop Connection, or equivalent)</li> <li>✓ Reading, understanding and identifying components of a network topology diagram</li> <li>✓ Troubleshooting network related incidents</li> </ul>

### 23. ECC Event Management Junior Operator

ROLE	The Event Management Junior Operator is responsible for operating server systems including performing DASD dumps, and system IPLs. They perform first level troubleshooting for server, mainframe, network, batch processing and IT infrastructure related incidents, and monitor mainframe and server systems and console software and utilities.
MINIMUM REQUIREMENTS	1 year of experience working in IT Operations in a data centre environment or school experience in the field of information management and information technology.
	Within the last 8 years, the resource must have:
	<ul style="list-style-type: none"> <li>• Experience in mainframe, server or network system monitoring;</li> </ul>
	<ul style="list-style-type: none"> <li>• Experience in using incident and Change management processes including inputting or updating information into Incident and change management systems; and</li> </ul>
MUST MEET AT LEAST 5 OF THE FOLLOWING REQUIREMENTS	Valid Canadian Federal Government Security Clearance: Secret.
	<ul style="list-style-type: none"> <li>✓ Operate mainframe, server computers, or networking infrastructures</li> <li>✓ Experience in mainframe, server or network monitoring</li> <li>✓ Experience in using Event, incident and Change management processes including inputting or updating information into event, incident and change management systems</li> <li>✓ Create, update, and implement operational procedures and/or checklists</li> <li>✓ Experience in using system performance or diagnostic tools</li> <li>✓ Performing system IPLs or server reboots</li> <li>✓ Troubleshooting problems and issues in Mainframe, Server or Network environment</li> <li>✓ Reading, understanding and identifying components of a network topology diagram</li> <li>✓ Troubleshooting network related incidents</li> </ul>

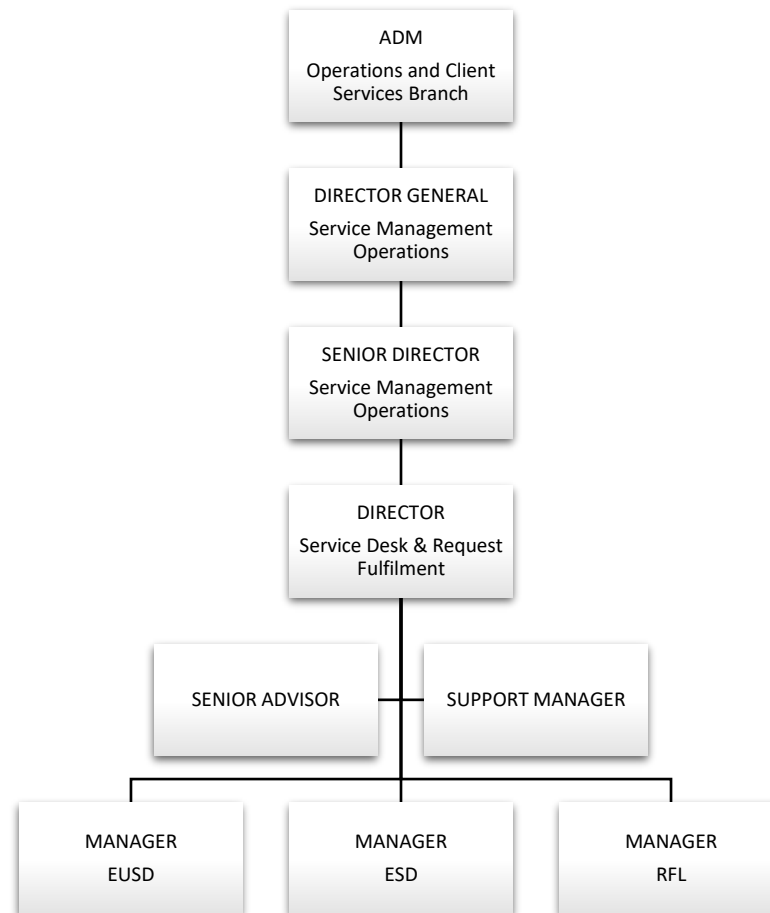
## 24. ECC Event Management Senior Technical Advisor

<p><b>ROLE</b></p>	<p>ECC Event Management Senior Technical Advisor The ECC Event Management Senior Technical Advisor is responsible for providing senior level expertise and guidance to support to the IT Service Management environment at SSC in one or more of the following areas: Event Management, Incident Management, Problem Management, IT Service Desk, Configuration Management, Change Management, Release Management, Security Operations Management, IT Service Continuity Management, Capacity Management, Availability Management, Service Management, IT Financial Management. They oversee and manage the creation, modification and updating of IT Service Management documentation, processes and procedures, and lead or manage IT Service Management projects. They must conduct IT Service Management briefings and presentations to SSC management and other support groups, and liaise with SSC management to provide strategic guidance and recommendations on IT Service Management business.</p>
<p><b>MINIMUM REQUIREMENTS</b></p>	<p>4 years of experience in operations management .</p> <p>Within the last 8 years, the resource must have:</p> <ul style="list-style-type: none"> <li>• ITIL Intermediate Certificate in IT Service Management (ITIL v3 or higher);</li> <li>• Experience in communicating plans and strategies to management and employees; and</li> <li>• Experience in leading the implementation of IT Service Management projects.</li> </ul> <p>Valid Canadian Federal Government Security Clearance: Secret.</p>
<p><b>MUST MEET AT LEAST 6 OF THE FOLLOWING REQUIREMENTS</b></p>	<ul style="list-style-type: none"> <li>✓ Analysing operational statistics on at least 5 projects</li> <li>✓ Working with service management tools (e.g. Infoman; Tivoli, Remedy etc.)</li> <li>✓ Working with IT Service Management tools or systems in a data centre production environment</li> <li>✓ Working as a Project lead on IT Service Management projects</li> <li>✓ Developing procedures for IT Service Management</li> <li>✓ Creating and updating data flow diagrams using Visio or equivalent flowcharting tool</li> <li>✓ Providing training to IT personnel</li> <li>✓ Experience in planning IT Service Management implementations in a large datacentre environment</li> <li>✓ Experience in communicating plans and strategies to management and employees</li> </ul>

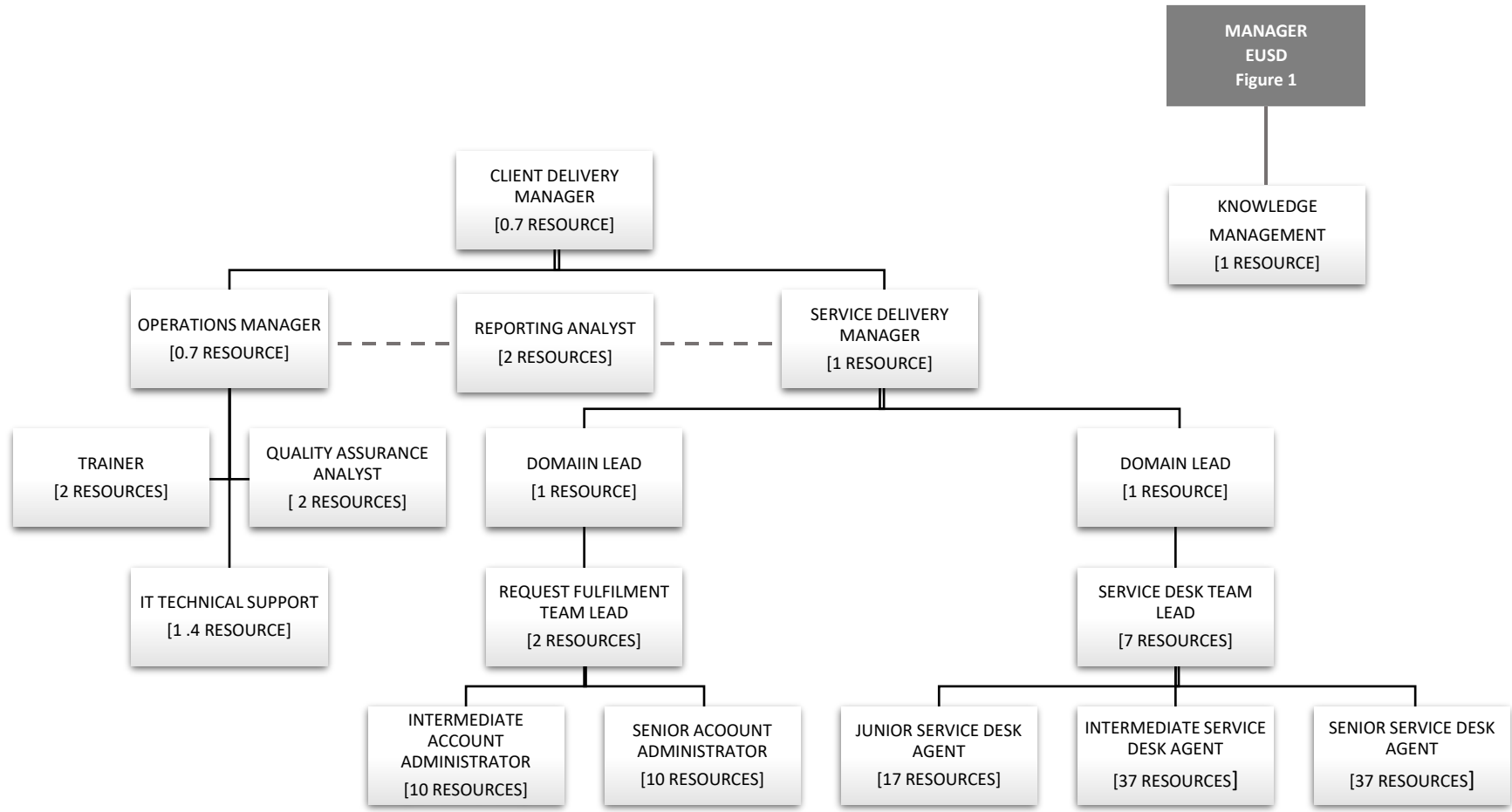
## 25. ECC Event Management Intermediate Technical Advisor

ROLE	ECC Event Management Intermediate Technical Advisor The ECC Event Management Senior Technical Advisor provides support to the IT Service Management environment at SSC in one or more of the following areas: Event Management, Incident Management, Problem Management, IT Service Desk, Configuration Management, Change Management, Release Management, Security Operations Management, IT Service Continuity Management, Capacity Management, Availability Management, Service Management, and IT Financial Management. They must create, modify and update IT Service Management documentation, processes and procedures, and must manage or participate in IT Service Management projects.
MINIMUM REQUIREMENTS	3 years of experience in operations management.
	Within the last 8 years, the resource must have:
	<ul style="list-style-type: none"> <li>• ITIL Intermediate Certificate in IT Service Management (ITIL v3 or higher;</li> </ul>
	<ul style="list-style-type: none"> <li>• Experience in communicating plans and strategies to management and employees; and</li> <li>• Experience in the implementation of IT Service Management projects.</li> </ul>
MUST MEET AT LEAST 7 OF THE FOLLOWING REQUIREMENTS	Valid Canadian Federal Government Security Clearance: Secret.
	<ul style="list-style-type: none"> <li>✓ Analyzing operational statistics on at least 3 projects</li> <li>✓ Working with service management tools (e.g. Infoman; Tivoli, Remedy etc.)</li> <li>✓ Working with IT Service Management (ITIL) tools or systems in a data centre production environment</li> <li>✓ Working as a team member on at least 3 IT Service Management (ITIL) projects</li> <li>✓ Developing procedures for IT Service Management (ITIL) disciplines</li> <li>✓ Creating and updating data flow diagrams using Visio or equivalent flowcharting tool</li> <li>✓ Providing training to IT personnel</li> <li>✓ Experience in planning IT Service Management (ITIL) implementations in a large data centre environment</li> <li>✓ Experience in communicating plans and strategies to management and employees</li> <li>✓ Creating and updating operational documentation</li> </ul>

## APPENDIX B - ORGANIZATION STRUCTURE

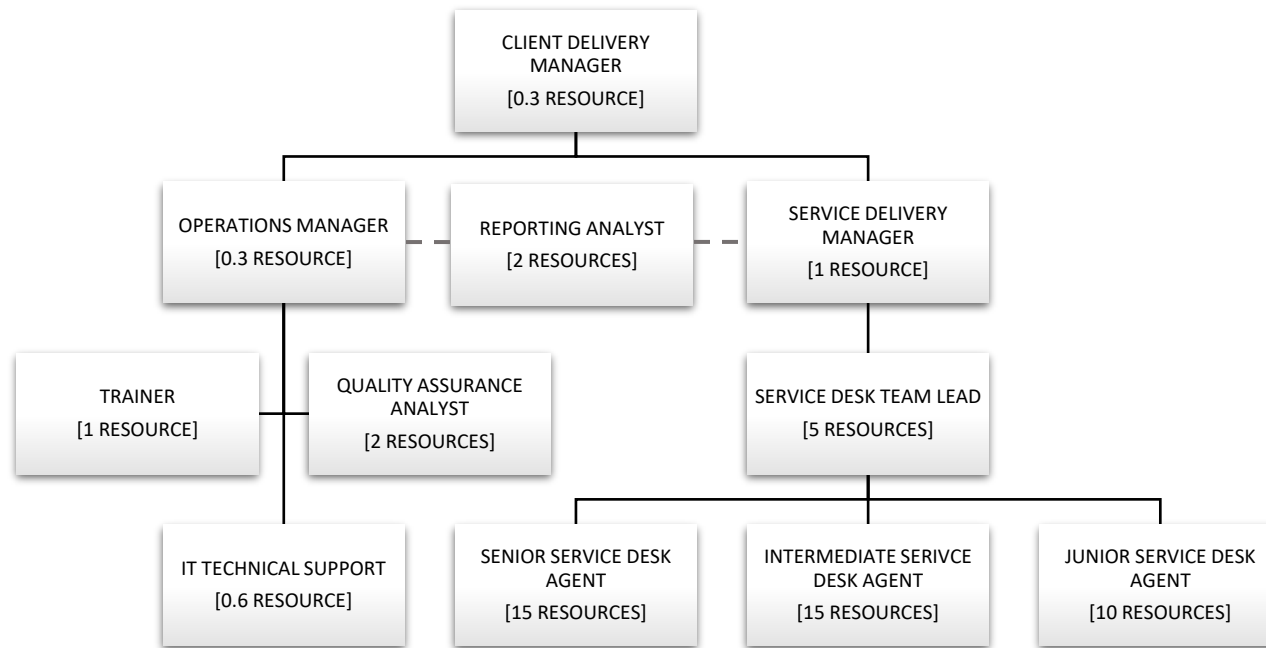


**Figure 1: SSC Organization Structure**



**Figure 2: Service Provider In Scope Resource Structure – EUSD / Request Fulfilment**





**Figure 3: Service Provider In Scope Resource Structure - ESD**

## APPENDIX C – GOVERNANCE

**Table 9: Governance**

AREA	NAME	FREQUENCY	SSC REPRESENTATIVE	SERVICE PROVIDER REPRESENTATIVES		AGENDA
				OPERATIONAL	CONTRACT	
END USER SERVICE DESK	SERVICE OPERATION TEAM (SOT)	DAILY	EUSD MANAGER	SERVICE DELIVERY MANAGER DOMAIN LEAD TEAM LEADS		<ol style="list-style-type: none"> <li>Daily operational level review</li> <li>Metrics Review (Comparison of prior day KPIs against SLOs)</li> <li>Issues Tracker (Report on collaborative efforts to improve KPIs against SLOs)</li> </ol>
	MANAGER'S ONE-ON-ONE	BI-WEEKLY	ESD MANAGER DOMAIN LEAD	SERVICE DELIVERY MANAGER		<ol style="list-style-type: none"> <li>Hot Topic(S)</li> <li>Issue Tracker</li> <li>Review Problematic Interaction Log</li> </ol>
ENTERPRISE SERVICE DESK	WEEKLY MANAGER MEETING	WEEKLY	ESD MANAGER	SERVICE DELIVERY MANAGER TEAM LEADS		<ol style="list-style-type: none"> <li>Weekly operational level review</li> <li>Metrics Review (Comparison month-to-date KPIs against SLOs)</li> <li>Issues Tracker (Report on collaborative efforts to improve KPIs against SLOs)</li> </ol>
	MANAGER'S ONE-ON-ONE	TWICE A WEEK	ESD MANAGER	SERVICE DELIVERY MANAGER		<ol style="list-style-type: none"> <li>Hot Topic(S)</li> <li>Issue Tracker</li> <li>Review Problematic Interaction Log</li> </ol>
ALL	BUSINESS TOUCH BASE	BI-WEEKLY	DIRECTOR EUSD MANAGER ESD MANAGER FULFILMENT MANAGER SENIOR ADVISOR		CLIENT DELIVERY EXECUTIVE OPERATIONS MANAGER	<ol style="list-style-type: none"> <li>Human resource issues</li> <li>Staffing issues (review daily Staffing Report)</li> <li>Facilities issues</li> <li>Remote work-from-home issues</li> <li>Identification of impending SLA failure(s)</li> <li>Contract Issues Tracker (Report on outstanding SLA Corrective Action Plans)</li> </ol>
ALL	SERVICE MANAGEMENT COMMITTEE (SMC)	MONTHLY	DIRECTOR EUSD MANAGER ESD MANAGER FULFILMENT MANAGER SENIOR ADVISOR	SERVICE DELIVERY MANAGER DOMAIN LEAD	CLIENT DELIVERY EXECUTIVE	<ol style="list-style-type: none"> <li>Monthly Operations Report</li> <li>KPI/SLO Summary</li> <li>Monthly Staffing Report</li> <li>Problems, disputes, incidents and or request for change</li> <li>Innovation and continuous improvement</li> <li>Service Provider Performance against SLAs*</li> <li>SSC satisfaction</li> <li>Risks and Issues</li> <li>Results of QA Calibration exercise</li> </ol>

AREA	NAME	FREQUENCY	SSC REPRESENTATIVE	SERVICE PROVIDER REPRESENTATIVES		AGENDA
				OPERATIONAL	CONTRACT	
		ADHOC (within 5 FGWDS from reporting of SLA Failure)	DIRECTOR AFFECTED MGR. SENIOR ADVISOR	SERVICE DELIVERY MANAGER DOMAIN LEAD	CLIENT DELIVERY EXECUTIVE	<ol style="list-style-type: none"> <li>1. Root Cause Analysis (RCA)</li> <li>2. SLA Corrective Action Plan</li> </ol>
ALL	SERVICE EXECUTIVE COMMITTEE (SEC)	QUARTERLY	SENIOR DIRECTOR DIRECTOR		ACCOUNT EXECUTIVE CLIENT DELIVERY EXECUTIVE	<ol style="list-style-type: none"> <li>1. Executive Exchange</li> <li>2. Strategic and Business Directions</li> <li>3. Direction for Innovation Council</li> </ol>

## APPENDIX D – REPORTING REQUIREMENTS

## 1. Service Desk Reports

The following service desk operational data shall be prepared for the frequency indicated:

**Table 10: EUSD\* and ESD Key Performance Indicators**

CATEGORY	INDEX	KEY PERFORMANCE INDICATOR	PRIOR DAY [DAILY]	MONTH-TO-DATE [DAILY]	TOTAL MONTH [MONTHLY]	PRIOR 12-MONTHS [MONTHLY]
VOLUME OF WORK	1.0	Total Number of Calls Offered	✓	✓	✓	✓
	1.1	Total Number of Chats Offered	✓	✓	✓	✓
	1.2	Total Number of Emails Received	✓	✓	✓	✓
	1.3	Total Number of Self-Service Requests Received	✓	✓	✓	✓
CALLS ANSWERED	2.0	Number of Calls Answered in > 60 seconds	✓	✓	✓	✓
	2.1	Number of Calls Answered in ≤ 60 seconds	✓	✓	✓	✓
	2.2	Number of Calls Answered in ≤ 120 seconds	✓	✓	✓	✓
	2.3	Number of Calls Answered in ≤ 300 seconds	✓	✓	✓	✓
	2.4	Total Number of Calls Answered	✓	✓	✓	✓
	2.5	Percentage of Calls Answered in ≤ 60 seconds	✓	✓	✓	✓
	2.6	Percentage of Calls Answered in ≤ 120 seconds	✓	✓	✓	✓
CALLS ABANDONED	3.0	Number of Calls Abandoned in 60 seconds or less	✓	✓	✓	✓
	3.1	Number of Calls Abandoned in over 60 seconds	✓	✓	✓	✓
	3.2	Total Number of Calls Abandoned	✓	✓	✓	✓
	3.3	Call Abandonment Rate	✓	✓	✓	✓
CHATS** ANSWERED	4.0	Number of Chats Answered in > 60 seconds	✓	✓	✓	✓
	4.1	Number of Chats Answered in ≤ 60 seconds	✓	✓	✓	✓
	4.2	Number of Chats Answered in ≤ 120 seconds	✓	✓	✓	✓
	4.3	Number of Chats Answered in ≤ 300 seconds	✓	✓	✓	✓
	4.4	Total Number of Chats Answered	✓	✓	✓	✓
	4.5	Percentage of Chats Answered in ≤ 60 seconds	✓	✓	✓	✓
	4.6	Percentage of Chats Answered in ≤ 120 seconds	✓	✓	✓	✓
CHATS** ABANDONED	5.0	Number of Chats Abandoned in 60 seconds or less	✓	✓	✓	✓
	5.1	Number of Chats Abandoned in over 60 seconds	✓	✓	✓	✓
	5.2	Total Number of Chats Abandoned	✓	✓	✓	✓
	5.3	Chat Abandonment Rate	✓	✓	✓	✓
EMAIL RESPONSES	6.0	Number of Emails Deemed Not Actionable	✓	✓	✓	✓
	6.1	Number of Emails Responded (without Automation) in ≤ 1 hour	✓	✓	✓	✓
	6.2	Number of Emails Responded (without Automation) in > 1 hour and ≤ 4 hours	✓	✓	✓	✓
	6.3	Number of Emails Responded (without Automation) in > 4 hours	✓	✓	✓	✓
	6.4	Total Number of Emails Responded	✓	✓	✓	✓
	6.5	Percentage of Emails Responded (without Automation) in ≤ 1 hour	✓	✓	✓	✓
SELF-SERVICE PORTAL REQUESTS	7.0	Number of Self-Service Portal Requests Deemed Not Actionable	✓	✓	✓	✓
	7.1	Number of Self-Service Portal Requests Responded (without Automation) in ≤ 1 hour	✓	✓	✓	✓
	7.2	Number of Self-Service Portal Requests Responded (without Automation) in > 1 hour and ≤ 4 hours	✓	✓	✓	✓

CATEGORY	INDEX	KEY PERFORMANCE INDICATOR	PRIOR DAY [DAILY]	MONTH-TO-DATE [DAILY]	TOTAL MONTH [MONTHLY]	PRIOR 12-MONTHS [MONTHLY]
	7.3	Number of Self-Service Portal Requests Responded (without Automation) in > 4 hours	✓	✓	✓	✓
	7.4	Total Number of Self-Service Portal Requests Responded	✓	✓	✓	✓
	7.5	Percentage of Self-Service Portal Requests Responded (without Automation) in ≤ 1 hour	✓	✓	✓	✓
	7.6	Percentage of Self-Service Portal Requests Responded (without Automation) in ≤ 4 hours	✓	✓	✓	✓
END USER EXPERIENCE	8.0	Average Call Wait Time	✓	✓	✓	✓
	8.1	Average Call Interaction Time with Agent	✓	✓	✓	✓
	8.2	Average Chat Wait Time	✓	✓	✓	✓
	8.3	Average Chat Interaction Time with Agent	✓	✓	✓	✓
	8.4	Quality Assurance Score	-	-	✓	✓
	8.5	Customer Satisfaction Survey	-	-	✓	✓
SERVICE DESK EFFECTIVENESS	9.0	Average Call Handle Time (Including Wrap-up)	✓	✓	✓	✓
	9.1	Average Chat Handle Time (Including Wrap-up)	✓	✓	✓	✓
	9.2	Number of Resolvable Calls/Chats Answered and Not Resolved at First Contact	✓	✓	✓	✓
	9.3	Number of Resolvable Calls/Chats Answered and Resolved at First Contact	✓	✓	✓	✓
	9.4	Total Number of Resolvable Calls/Chats Answered	✓	✓	✓	✓
	9.5	Number of Non-Resolvable Calls/Chats Answered	✓	✓	✓	✓
	9.7	Hourly Average Number of Calls/Chats Answered by Agents during Measurement Period	✓	✓	✓	✓
	9.8	Hourly Average Number of Emails Responded by Agent during Measurement Period	✓	✓	✓	✓
	9.9	Hourly Average Number of Self-Service Portal Requests Responded by Agent during Measurement Period	✓	✓	✓	✓
	9.10	First Contact Resolution	✓	✓	✓	✓
REQUEST FULFILMENT	10.1	Opening Backlog of Service Requests	✓	✓	✓	✓
	10.2	New Request Fulfilment Tickets Opened	✓	✓	✓	✓
	10.3	Service Requests Processed	✓	✓	✓	✓
	10.4	Closing Backlog of Service Requests	✓	✓	✓	✓
TRENDING	11.1	Number of Tickets by Category Type	-	-	✓	✓

\* Reported by individual Customer Desk and in Aggregate.

\*\* Currently for EUSD only. Chat functionality is pending for the ESD.

## 2. Agent/Administrator Performance Reporting and Documentation

The following agent/administrator performance data shall be prepared for the frequency indicated:

### 2.1. Agent/Administrator Scorecards

**Table 11: EUSD and ESD Agent Scorecards**

CATEGORY	INDEX	AGENT PERFORMANCE METRICS	PRIOR DAY [DAILY]	MONTH-TO-DATE [DAILY]	TOTAL MONTH [MONTHLY]	PRIOR 12-MONTHS [MONTHLY]
<b>QUALITY</b>	1.0	Quality Assurance	-	✓	-	-
<b>CALL EFFICIENCY</b>	2.0	Number of Calls Answered	-	✓	-	-
	3.0	Number of Calls Abandoned	-	✓	-	-
	4.0	Average Engage Time	-	✓	-	-
	5.0	Average Hold Time	-	✓	-	-
	6.0	Average Wrap-Up	-	✓	-	-
<b>CALL OUTLIERS</b>	7.0	Number of Calls With Duration < 2 Minutes	-	✓	-	-
	8.0	Number of Calls With Handle Time > 45 Minutes	-	✓	-	-
	9.0	Number of Calls With Hold Time > 5 Minutes	-	✓	-	-
	10.0	Number of Calls With Wrap-up > 15 Minutes	-	✓	-	-
	11.0	Duration of Longest Call	-	✓	-	-
<b>PRODUCTIVITY</b>	12.0	SDs Handled from Emails*	-	✓	-	-
	13.0	SDs Opened	-	✓	-	-
	14.0	RFL (ESD) Opened	-	✓	-	-
	15.0	SDs Updated	-	✓	-	-
	16.0	SDs Closed	-	✓	-	-
	17.0	IMs Opened	-	✓	-	-
	18.0	IMs Updated	-	✓	-	-
	19.0	IMs Closed	-	✓	-	-
<b>TIME NOT READY</b>	20.0	Ticketing Ratio	-	✓	-	-
	21.0	Total Duration of Call backs	-	✓	-	-
	22.0	Total Duration of Project Work	-	✓	-	-
	23.0	Total Duration of Breaks	-	✓	-	-
	24.0	Total Duration of Lunch	-	✓	-	-
	25.0	Total Duration of Personal	-	✓	-	-
	26.0	Total Duration of Coaching	-	✓	-	-
27.0	Total Duration of Emergency	-	✓	-	-	

\* for Health Canada Only.



**Table 12: RFL Administrator Scorecards**

CATEGORY	INDEX	AMINISTRATOR PERFORMANCE METRICS	PRIOR DAY [DAILY]	MONTH-TO-DATE [DAILY]	TOTAL MONTH [MONTHLY]	PRIOR 12-MONTHS [MONTHLY]
<b>QUALITY</b>	1.0	Quality Assurance	-	✓	-	-
<b>EFFECTIVENESS</b>	2.0	Agent Effectiveness	-	✓	-	-
<b>PRODUCTIVITY</b>	3.0	SSC RFs	-	✓	-	-
	4.0	PSPC RFs	-	✓	-	-
	5.0	Production Hours	-	✓	-	-
	6.0	Clarifications	-	✓	-	-
	7.0	Standard User	-	✓	-	-
	8.0	Change Function Account	-	✓	-	-
	9.0	Change Generic Mailbox	-	✓	-	-
	10.0	Delete Standard	-	✓	-	-
	11.0	Re-enable User	-	✓	-	-
	12.0	Change Distribution List	-	✓	-	-
	13.0	Evergreening Exchange Notebook	-	✓	-	-
	14.0	Add Peripheral	-	✓	-	-
	15.0	Exchange Notebook	-	✓	-	-
	16.0	New Monitor	-	✓	-	-
	17.0	New Shared Drive Access	-	✓	-	-
18.0	Add User to Standard Gate	-	✓	-	-	
19.0	Return Notebook	-	✓	-	-	
20.0	Office Move	-	✓	-	-	
21.0	New Software Group	-	✓	-	-	
22.0	Update Properties	-	✓	-	-	
23.0	All Other Requests	-	✓	-	-	

## 2.2. Agent Report Cards

**Table 13: EUSD and ESD Agent Report Cards**

CATEGORY	INDEX	AGENT PERFORMANCE METRICS	PRIOR DAY [DAILY]	MONTH-TO-DATE [DAILY]
AGENT REPORT CARD	1.0	Number of Calls Answered	✓	✓
	2.0	Number of Calls Abandoned	✓	✓
	3.0	Ticketing Rate %	✓	✓
	4.0	Average Engage Time	✓	✓
	5.0	Average Hold Time	✓	✓
	6.0	Average Wrap-Up	✓	✓
TIME REPORT	7.0	Login Time	✓	✓
	8.0	Time on Lunch	✓	✓
	9.0	Time on Break	✓	✓
	10.0	Time on Personal	✓	✓
	11.0	Logout Time	✓	✓

### 2.3. EUSD Daily Calls Report

**Table 14: EUSD Daily Calls Report**

CATEGORY	INDEX	AGENT PERFORMANCE METRICS	PRIOR DAY [DAILY]
AGENT STATISTICS	1.0	Total Number of Calls Answered	✓
	2.0	Number of Calls With Duration from 0 - 60 seconds	✓
	3.0	Number of Calls With Duration from 61 - 120 seconds	✓
	4.0	Number of Calls With Duration from 121 - 180 seconds	✓
	5.0	Number of Calls With Duration from 181 - 240 seconds	✓
	6.0	Total Number of Calls Answered in Under 4 minutes	✓
	7.0	Percentage of Calls Answered in Under 4 minutes to Total Calls Answered	✓
	8.0	Number of Calls Ended by Agent	✓
	9.0	Average Call Hold Time	✓
	10.0	Average Call Wrap Time	✓
	11.0	Agent Location (Service Provider Physical Location or Remote)	✓
	12.0	Total On Call Time	✓
	13.0	Total Off Call Time	✓
INDIVIDUAL CALL STATISTICS	14.0	Short Call Durations	✓
	15.0	High Hold Times	✓
	16.0	High Wrap Times	✓

### 3. Staffing Reports

The following staffing data shall be prepared for the frequency indicated:

**Table 15: EUSD and ESD Staffing Reports**

CATEGORY	INDEX	KEY PERFORMANCE INDICATOR	PRIOR DAY [DAILY]	MONTH-TO-DATE [DAILY]	TOTAL MONTH [MONTHLY]	PRIOR 12-MONTHS [MONTHLY]
AGENT ATTRITION	1.0	Number of Agents Available at Beginning of Month	-	-	✓	✓
	2.0	Number of Agents On-boarded During the Month	-	-	✓	✓
	3.0	Number of Agents Off-boarded During the Month	-	-	✓	✓
	4.0	Number of Agents Transferred from ESD During the Month	-	-	✓	✓
	5.0	Number of Agents Transferred to ESD During the Month	-	-	✓	✓
	6.0	Number of Agents Available at End of Period	-	-	✓	✓
	7.0	Agent Attrition	-	-	✓	✓
AGENT ABSENTEEISM	8.0	Number of Agents on Un-scheduled Absence	✓	-	✓	✓
	9.0	Number of Agents on Scheduled Absence	✓	-	✓	✓
	10.0	Target Number of Available Agents	✓	-	✓	✓
	11.0	Actual Number of Available Agents	✓	-	✓	✓
	12.0	Service Desk Staffing Level		-	✓	✓

## APPENDIX E - SERVICE LEVEL DESCRIPTIONS

## 1. Service Level Objectives

Service Level Objectives (SLOs) represent important service desk performance levels. Service desk performance metric(s) will be reported and reviewed in accordance with ANNEX A SOW: Appendix D Reporting Requirements and ANNEX A SOW: Appendix C Governance. Service Desk performance metric(s) falling short of SLO targets will be the focus of collaborative remediation efforts by both SSC and the Service Provider until such time as the subject service desk performance metric(s) meet or exceed their respective SLO target(s) as described below:

**Table 16: EUSD / ESD Service Level Objectives**

INDEX*	SLO (KEY PERFORMANCE INDICATOR)	MEASUREMENT PERIOD	SLO TARGET	FORMULA FOR THE PERIOD IN QUESTION
2.5	Percentage of Calls Answered in ≤ 60 seconds	Calendar Month	greater than or equal to 70%	$\frac{\text{number of calls answered by service desk agents within 60 seconds or less from time of entering the queue}}{\text{number of calls answered by service desk agents}} \times 100\%$
2.6	Percentage of Calls Answered in ≤ 120 seconds	Calendar Month	greater than or equal to 80%	$\frac{\text{number of calls answered by service desk agents within 120 seconds or less from time entering the queue}}{\text{number of calls answered by service desk agents}} \times 100\%$
2.7	Percentage of Calls Answered in ≤ 300 seconds	Calendar Month	greater than or equal to 90%	$\frac{\text{number of calls answered by service desk agents within 300 seconds or less from time of entering the queue}}{\text{number of calls answered by service desk agents}} \times 100\%$
3.3	Call Abandonment Rate	Calendar Month	less than or equal to 7.5%	$\frac{\text{number of calls abandoned after 60 seconds from time of entering the queue}}{\text{number of calls remaining in queue for more than 60 seconds from time of entering the queue}} \times 100\%$
4.5	Percentage of Chats Answered in ≤ 60 seconds*	Calendar Month	greater than or equal to 70%	$\frac{\text{number of chats answered by service desk agents within 60 seconds or less from time of entering the queue}}{\text{number of chats answered by service desk agents}} \times 100\%$
4.6	Percentage of Chats Answered in ≤ 120 seconds*	Calendar Month	greater than or equal to 80%	$\frac{\text{number of chats answered by service desk agents within 120 seconds or less from time of entering the queue}}{\text{number of chats answered by service desk agents}} \times 100\%$
4.7	Percentage of Chats Answered in ≤ 300 seconds*	Calendar Month	greater than or equal to 90%	$\frac{\text{number of chats answered by service desk agents within 300 seconds or less from time of entering the queue}}{\text{number of chats answered by service desk agents}} \times 100\%$
5.3	Chat Abandonment Rate*	Calendar Month	less than or equal to 7.5%	$\frac{\text{number of chats abandoned after 60 seconds from time of entering the queue}}{\text{number of chats remaining in queue for more than 60 seconds from time of entering the queue}} \times 100\%$
6.5	Percentage of Emails Responded (without Automation) in ≤ 1 hour	Calendar Month	greater than or equal to 90%	$\frac{\text{number of emails responded by service desk agents within 1 hour or less from time of entering the queue}}{\text{number of emails responded by service desk agents}} \times 100\%$
6.6	Percentage of Emails Responded (without Automation) in ≤ 4 hours	Calendar Month	greater than or equal to 98%	$\frac{\text{number of emails responded by service desk agents within 4 hours or less from time of entering the queue}}{\text{number of emails responded by service desk agents}} \times 100\%$

INDEX*	SLO (KEY PERFORMANCE INDICATOR)	MEASUREMENT PERIOD	SLO TARGET	FORMULA FOR THE PERIOD IN QUESTION
7.5	Percentage of Self-Service Portal Requests Responded (without Automation) in ≤ 1 hour	Calendar Month	greater than or equal to 90%	$\frac{\text{number of self service requests responded by service desk agents within 1 hour or less from time of entering the queue}}{\text{number of self service requests responded by service desk agents}} \times 100\%$
7.6	Percentage of Self-Service Portal Requests Responded (without Automation) in ≤ 4 hours	Calendar Month	greater than or equal to 98%	$\frac{\text{number of self service requests responded by service desk agents within 4 hours or less from time of entering the queue}}{\text{number of self service requests responded by service desk agents}} \times 100\%$
8.1	Average Call Interaction Time with Agent	Calendar Month	less than or equal to 15 minutes	$\frac{\text{total seconds of call interaction for all agents}}{\text{total number of calls answered}}$
9.0	Average Call Handle Time (Including Wrap-up)	Calendar Month	less than or equal to 18 minutes	$\frac{\text{total seconds of call handle time (interaction + wrap up)}}{\text{total number of calls answered}}$
8.3	Average Chat Interaction Time with Agent	Calendar Month	less than or equal to 15 minutes	$\frac{\text{total seconds of chat interaction for all agents}}{\text{total number of chats answered}}$
9.1	Average Chat Handle Time (Including Wrap-up)	Calendar Month	less than or equal to 18 minutes	$\frac{\text{total seconds of chat handle time (interaction + wrap up)}}{\text{total number of chats answered}}$
7.0	Agent Attrition	Calendar Month	TBD	$\frac{\text{number of agents off – boarded during the period}}{\text{mean number of agents available over the period}}$

\* Chat Functionality Pending for the ESD

## 2. Service Level Agreements

Service Level Agreements (SLAs) represent critical service desk performance levels. Service desk performance metric(s) falling short of SLA targets will require the Service Provider to perform remedial actions as outlined in Section 2.3 Problem Escalation for Service Level Failures. In addition, in accordance with Section 2.4 Service Credits, Service Level Credits shall be provided to SSC by the Service Provider in those instances where the service’s desk performance metric(s) fall short of the SLA targets as described below:

**Table 17: EUSD Service Level Agreements**

SLA CATEGORY	PERIOD MEASURED	SLA ALLOCATION PERCENTAGE	SLA TARGET
1.0 Customer Satisfaction Survey	Calendar Month	30%	greater than or equal to 75%
CALCULATION	$\frac{\text{sum of Customer Satisfaction Scores for all survey responses in the month}}{\text{total number of survey responses in the month}} \times 100\%$		
2.0 Quality Assurance	Calendar Month	30%	greater than or equal to 85%
CALCULATION	$\frac{\text{sum of Quality Assurance Scores for all Agents and Administrators in the month}}{\text{total number of Agents and Administrators in the month}} \times 100\%$		
3.0 Average of Billable Hours Divided by Target Hours for each Federal Government Working Day (FGWD) in the month	Calendar Month	40%	greater than or equal to 95%
CALCULATION	$\frac{\sum_{i=1}^N \frac{\text{Agent and Administrator Billable Hours for FGWD}_i}{\text{Target Number of Agents and Administrators for the Month} \times 7.5 \text{ Hours}}}{N \text{ [where } N = \text{the number of FGWDs in the Month]}} \times 100\%$ <p>Note 1: SSC will provide a resource forecast identifying the target number of agents and administrators for upcoming months on a three month rolling basis. The target number of agents and administrators will not vary more than 5% (with certain exceptions) from one month to the next. The first two months of the three month rolling forecast will be locked once SSC has provided it to the Service Provider.</p> <p>Note 2: For the purposes of this calculation, Billable Hours shall be limited to hours worked between 06:00 and 21:00 E.T.</p> <p>Note 3: For the purposes of this calculation, the numerator shall not exceed the denominator by more than 105% for any given FGWD.</p>		



**Table 18: ESD Service Level Agreements**

SLA CATEGORY	PERIOD MEASURED	SLA ALLOCATION PERCENTAGE	SLA TARGET
1.0 Quality Assurance	Calendar Month	40%	greater than or equal to 85%
CALCULATION	$\frac{\text{sum of Quality Assurance Scores for all Agents and Administrators in the month}}{\text{total number of Agents and Administrators in the month}} \times 100\%$		
2.0 Average of Billable Hours Divided by Target Hours for each Federal Government Working Day (FGWD) in the month	Calendar Month	40%	greater than or equal to 95%
	$\frac{\sum_{i=1}^N \frac{\text{Agent and Administrator Billable Hours for FGWD}_i}{\text{Target Number of Agents and Administrators for the Month} \times 7.5 \text{ Hours}}}{N \text{ [where } N = \text{the number of FGWDs in the Month]}} \times 100\%$ <p>Note 1: SSC will provide a resource forecast identifying the target number of agents and administrators for upcoming months on a three month rolling basis. The target number of agents and administrators will not vary more than 5% (with certain exceptions) from one month to the next. The first two months of the three month rolling forecast will be locked once SSC has provided it to the Service Provider.</p> <p>Note 2: For the purposes of this calculation, Billable Hours shall be limited to hours worked between 06:00 and 21:00 E.T.</p> <p>Note 3: For the purposes of this calculation, the numerator shall not exceed the denominator by more than 120% for any given FGWD.</p>		
3. Staffing (after hours, statutory holidays, and Saturdays/Sundays)	Calendar Month	20%	100%
CALCULATION	<p>Note 1: As part of the three month resource forecast, SSC shall provide minimum target staffing for weekday after hours (between 21:00 and 06:00 ET), statutory holidays and Saturdays/Sundays.</p> <p>Note 2: Failure to maintain minimum target staffing for any period in the calendar month shall constitute a Service Level Failure.</p>		

### 2.1. SLA Measurement

The Service Provider must continuously monitor and measure performance against all SLA targets. The format and required supporting data will be prescribed by Shared Services Canada prior to the commencement of the services, but in any event, the Service Provider will measure all data reasonably required by Shared Services Canada to determine performance against the applicable SLA targets. The Service Provider must give notice to Shared Services Canada immediately if the Service Provider is aware that an SLA target will not be achieved.

### 2.2. Monthly Reporting

Within Five (5) Federal Government Working Days after the end of each month, the Service Provider must provide reports in soft-copy form, detailing the actual measured level of performance for each SLA target for the prior month. Shared Services Canada may request, at no additional cost to Shared Services Canada, extracts of the underlying source data prepared in a sufficient manner to enable Shared Services Canada to confirm the accuracy and completeness of the monthly Service Level Agreement reports. Any changes to reporting required by Shared Services Canada which results in the development or modification of reporting tools must be provided at no cost to Shared Services Canada.

In each monthly report the Service Provider must:

- describe each failure to achieve an SLA target (“Service Level Failure”);
- notify Shared Services Canada of any Service Level Credits, including Additional Service Level Credits, to which Shared Services Canada is entitled;
- notify Shared Services Canada of any Earn Back Credits; and
- provide Root Cause Analysis and corrective action plans for each Service Level Failure.

The monthly reports, custom reports, underlying source data, and any other data or information provided pursuant to this section will constitute Confidential Information of Shared Services Canada.

### 2.3. Problem Escalation for Service Level Failures

If the Service Provider discovers a Service Level Failure or Shared Services Canada notifies the Service Provider of a Service Level Failure, the Service Provider must at its cost and expense:

- perform a Root Cause Analysis (RCA) to identify the cause of such Service Level Failure;
- within Five (5) Federal Government Working Days after reporting an SLA Failure, provide Shared Services Canada with a written RCA Report (detailing the cause of such Service Level Failure) for review at a Service Committee Meeting convened for that purpose;
- Provide Shared Services Canada with a Corrective Action Plan (CAP) within Five (5) Federal Government Working Days after presentation of the RCA Report;
- Implement the CAP within 20 Federal Government Working Days of presentation of the CAP; and
- Provide progress reports against the CAP at bi-weekly Business Touch Base meetings.

The CAP is intended as a measure to prevent a recurrence of a Service Level Failure and is to be presented to Shared Services Canada in order to demonstrate the Service Provider’s ability to meet the Service Level associated with any Service Level Failure. The plan must at a minimum contain:

- the planned actions and the related Milestone Deadlines by which such actions will be completed;
- any proposed workarounds as an interim solution to providing a permanent fix, where such workarounds have not already been provided as part of the Service Provider's obligation to provide the services; and
- The criteria for demonstrating that the underlying problem relating to the Service Level Failure has been resolved.

## 2.4. Service Credits

This section outlines the Service Level Credit mechanism. For the purposes of this Section, EUSD (EUSD) Services and Enterprise Service Desk (ESD) Services shall be treated as independent billing units and shall be referred to individually as the "Affected Service".

### 2.4.1. Service Level Credits

If the Service Provider fails to meet or exceed the SLA target for any SLA Category for any Affected Service in any calendar month, the Service Provider must provide a Service Level Credit to Shared Services Canada as set out in this Appendix.

### 2.4.2. Base Service Level Credit Calculations

For each Service Level Failure, the Service Provider must provide to Shared Services Canada a Base Service Level Credit calculated as:

$$\text{Base Service Level Credit} = \mathbf{A} \times \mathbf{B}$$

Where:

**A** = the SLA Allocation Percentage applicable to the SLA category of the Affected Service; and

**B** = the At Risk Amount (15% of the monthly charges for the Affected Service).

An example of the calculation of a Service Level Credit is set out below:

Assume that the Service Provider's total monthly charges for the Affected Service in the month in which the Service Level Failure occurred were \$1,000,000; the SLA Allocation Percentage applicable to the subject SLA category is 30%; and the At Risk Amount is \$150,000 (15% times the \$1,000,000 monthly charges above). The Base Service Level Credit due to Shared Services Canada for such Service Level Failure would be \$45,000 and would be calculated as follows:

**A** = 30% (the SLA Allocation Percentage applicable to the subject SLA Category for the Affected Service); multiplied by

**B** = \$150,000 (the At Risk Amount for the Affected Service = [15% times the \$1,000,000 monthly charges]);

Equals \$45,000.

### 2.4.3. Monthly Sum

If more than one Service Level Failure occurs in a single month, the sum of the corresponding Service Level Credits (Base Service Level Credits and Additional Service Level Credits if applicable) must be provided to Shared Services Canada (subject to Section 2.4.5 Monthly Limit described below).

### 2.4.4. Additional Service Level Credits for Subsequent Service Level Failures.

If a Service Level Failure occurs in two or more consecutive months with respect to the same SLA Category, the Service Provider must provide Shared Services Canada with an Additional Service Level Credit (to be added to the Base Service Credit) as follows:

- for the second month in which such Service Level Failure occurs, the amount of the Base Service Level Credit for such Service Level Failure divided by two (2); and
- for the third and any subsequent consecutive month in which such Service Level Failure occurs, the amount of the Base Service Level Credit.

For example, if a Service Level Failure occurred in three consecutive months and the base Service Level Credit (calculated in accordance with Section 2.4.2 Base Service Level Credit Calculations described above) was \$75,000, Shared Services Canada would be entitled to a Base Service Level Credit of \$75,000 for the first month, a Base Service Level Credit of \$75,000 plus an Additional Service Level Credit of \$37,500 for the second consecutive month, and a Base Service Level Credit of \$75,000 plus an Additional Service Level Credit of \$75,000 for the third consecutive month.

### 2.4.5. Monthly Limit

The total amount of all Base Service Level Credits and Additional Service Level Credits to be paid to Shared Services Canada for Service Level Failures, in respect of an Affected Service, in any single calendar month will not exceed fifteen percent (15%) of the total monthly charges for that Affected Service.

### 2.4.6. Service Level Earn Backs

Where the performance of the Service Provider meets or exceeds the SLA target for a subject SLA category of an Affective Service for three consecutive months immediately following the month of a Service Failure for that same subject SLA category of that same Affected Service, the Service Provider shall be entitled to receive funds from Shared Services Canada equal to the Base Service Level Credit (and Additional Service Level Credit where applicable) that was paid in respect of the above referenced Service Failure. For greater certainty, in the instance of consecutive months of Service Level Failures for the same SLA category of an Affected Service, the Earn Back provision shall only apply to Service Credits paid in respect to the final month of Service Level Failure.

### 2.4.7. Termination for Recurring Service Level Failure

If a Service Level Failure occurs for the same SLA category of an Affected Service in three or more months in any rolling nine month period, then Shared Services Canada may terminate this agreement or the task authorization under which the applicable service is provided immediately upon notice to the Service Provider.

## APPENDIX F RESOURCE PERFORMANCE ASSURANCE

## 1. Resource Performance Assurance

The Resource Performance Assurance process (RPA) uses a systematic approach to ensure high-quality service across all interactions. The process includes, but is not limited to the following activities:

### A. Administering the Process

- Maintaining and developing Service Desk quality and performance standards;
- Evaluating the Resource Performance Assurance processes and adding value as part of investigating complaints or performance concerns;
- Investigating clients' needs and developing strategies for meeting those requirements; and
- Creating strategies to improve those KPIs and SLOs that are not performing as expected.

### B. Quality Assurance

- Formal Quality Assurance Audits for incorporation into Resource Scorecards and SLA Calculations;
- Ancillary Calculations (not included in Resource Scorecards or SLA calculations) by Team Lead;
- Reviewing a subset of Service Desk resource interactions; and
- Providing feedback on resource interactions (developing, and delivering additional training as appropriate).

### C. Resource Performance Metrics Monitoring

- Analyzing resource service performance metrics against peer performance;
- Analyze all service metrics and determine how the Service Desk agent's performance affects those KPIs, and to create strategies to improve KPIs;
- Delivering feedback and coaching as appropriate; and
- Taking remedial action for enduring under-performance.

### D. Call Statistics Review

- On-going review of call statistics to identify resource and operational factors that are operating outside the normal range.

### E. Problematic Interactions

- Investigating reported problematic interactions and making recommendations on follow-up action (where warranted); and
- Maintaining log of problematic interactions for presentation at bi-weekly Business Touch Base Meeting.

The Service Delivery Manager will bear ultimate responsibility for the design and maintenance of the RPA. Quality Assurance Analysts and Team Leads will be responsible for implementing the process.

## 2. Quality Assurance

On-going audits of agent/administrator interactions (on a sample basis) are conducted in order to ensure that agent/administrator performance and overall service desk performance are meeting established performance standards.

## 2.1. Scope of Quality Assurance Process

The Quality Assurance Process consists of formal audits conducted by Quality Assurance Analysts and ancillary audits conducted by Team Leads.

### 2.1.1. Formal Audits

Formal Audits of agent/administrator interactions are undertaken to determine a Quality Assurance score for each agent/administrator at the end of each month. The QA Score is one of the metrics included in the Agent/Administrator Scorecards (see Section 4.1 Agent/Administrator Scorecards below) to rank overall resource performance. In addition, QA scores are summarized at the end of each month to determine the Quality Assurance service category performance against the SLA Target as described in ANNEX A SOW: Appendix E Section 2. Service Level Agreements. Formal auditing undertaken by Quality Assurance Analysts shall be conducted on the following samples each month (Note: the method of selection may be subject to change over time at the discretion of SSC):

**Table 19: Quality Assurance Monthly Sampling – Formal Audits**

DESK	RESOURCE	NUMBER OF AUDITS PER RESOURCE PER MONTH	METHOD OF SELECTION	
			Week	Interaction
EUSD Calls*	Resource	1	1	6th
		1	1	12th
		1	1	18th
		1	3	6th
		1	3	12th
		1	3	18th
	<b>Total</b>	<b>6</b>		
Health Canada Calls	Resource	1	1	6th
		1	1	12th
		1	1	18th
		1	3	6th
		1	3	12th
		1	3	18th
	<b>Total</b>	<b>6</b>		
EUSD RFL Requests	Resource	1	1	6th
		1	1	12th
		1	1	18th
		1	3	6th
		1	3	12th
		1	3	18th
	<b>Total</b>	<b>6</b>		
ESD Calls**	Resource	1	1	6th
		1	1	12th
		1	1	18th
		1	3	6th
		1	3	12th
		1	3	18th
	<b>Total</b>	<b>6</b>		
ESD Emails**	Resource	1	1	6th
		1	1	12th
		1	1	18th

		1	3	6th
		1	3	12th
		1	3	18th
	<b>Total</b>	<b>6</b>		

\* Excludes Health Canada

\*\* ESD Agents shall be subject to 12 audits per month comprised of 6 emails and 6 calls. In instances of insufficient quantities of calls or emails in a given month, calls or emails may be substituted for the other as required.

### 2.1.1.1. Formal Audit Calibration

SSC shall perform Quality Assurance scoring on a sample of Formal Audits performed by the Quality Assurance Analysts on a monthly basis. Material discrepancies between the SSC scores and the Quality Assurance Analyst scores will be reviewed by both parties to ensure alignment through the following actions:

- Adjustment to the wording of the scoring tables to remove ambiguities; and
- Coaching of Quality Assurance Analysts to ensure alignment with SSC expectations.

### 2.1.2. Ancillary Audits

Ancillary audits are undertaken in order to enable Team Leads to assess agent/administrator performance and to provide constructive feedback when warranted. The ancillary auditing undertaken by Team Leads shall be conducted on the following samples each month (Note: the method of selection will be subject to change over time at the discretion of SSC):

**Table 20: Quality Assurance Monthly Sampling – Ancillary Audits**

DESK	RESOURCE	NUMBER OF AUDITS PER RESOURCE PER MONTH	METHOD OF SELECTION	
			Week	Interaction*
EUSD Calls*	Resource (on Probation)	8	Randomly Selected	
	Resource	6	Randomly Selected	
Health Canada Calls	Resource (on Probation)	8	Randomly Selected	
	Resource	6	Randomly Selected	
EUSD RFL Requests	Resource (on Probation)	8	Randomly Selected	
	Resource	6	Randomly Selected	
ESD Calls	Resource (on Probation)	8	Randomly Selected	
	Resource	6	Randomly Selected	
ESD Emails	Resource (on Probation)	8	Randomly Selected	
	Resource	6	Randomly Selected	

\* Excludes Health Canada

### 2.2. Call Recordings

Call recordings are retained in the Speech Miner Database. Call recordings from the preceding week are reviewed using the Speech Miner Database.

### 2.3. Scoring

The following scoring methodology will be used:



2.3.1. Quality Assurance Scoring - EUSD Calls

**Table 21: Quality Assurance Scoring – EUSD Calls**

CATEGORY	CONTENT	POINTS	
		EUSD*	HEALTH CANADA
GREETING	Was the proper greeting used including the agent's name?	2.5	3
	Did the resource gather the caller's information, starting with their last name?	2.5	3
	Did the resource confirm the caller's profile information (i.e. location, phone number and asset)?	2	2
TROUBLE SHOOTING	Did the resource ask follow-up questions related to the initial caller's issue?	2	2.5
	Did the resource show a level of knowledge of the issue that would build caller's confidence/trust)	2	2
	Did the resource follow the troubleshooting process found in the Knowledgebase related to caller's issue?	2	2
COMMUNICATION	Did the agent understand the issue and paraphrase back to the caller?	2	2.5
	Did the agent use the proper hold technique (asking the caller if they agree to be put on hold)?	2	2.5
	Did the agent use a clear voice with focused dialogue and tone?	2	2.5
	Did the agent take ownership of the call?	2	2.5
CLOSING SCRIPT	Did the agent follow the closing script including providing a ticket number?	2	2.5
DOCUMENT TICKET	Did the agent use the proper title format?	1	-
	For the Configuration Item used in SD interaction, is the Configuration Item listed in in the title?	1	-
	Did the agent use the proper title format and list the Product Type in the title?	-	3
	Did the agent document a clear description of issue (including all troubleshooting steps completed during the call/required by Knowledgebase)?	12	5
	Was the ticket template filled out completely and accurately? Did the agent review the ticket to ensure that no Protected B data was entered into ITSM tool?	5	
RESOLUTION	Did the agent attempt to resolve the issue?	3	3
	Were proper troubleshooting and resolution steps documented?	3	3
CLASSIFICATION / CATEGORIZATION	Did the agent prioritize the ticket properly?	2	2
	Did the agent categorize the ticket properly?	5	-
	Did the agent categorize the ticket properly, mapping the Category Area and Sub Area?	-	2
	Did the agent document the proper Configuration Item?	5	-
	Did the agent document the proper Product Type?	-	10
TICKET PROCEDURES	Did the agent follow the correct ticket handling procedures found in the knowledgebase?	5	3
FINAL QUALITY CONTROL	Did the agent follow the correct ticket handling procedures found in the knowledgebase?	-	2
AUTO-FAIL	Did the agent answer the call in the language of selection and continue the call in the language of selection?	15	20
	Did the agent refrain from hanging-up, arguing, insulting or being rude with the caller?	20	20
<b>TOTAL SCORE</b> <i>All categories must be assessed by the evaluator as either Yes (full points), No (0 points), or Not applicable. Where multiple criteria relate to a single category, "Yes" must be assessed for all applicable criteria in order for any points to be awarded for the given category. For the purposes of calculating agent performance percentage (points awarded divided by total available points), the total available points must be reduced for questions assessed as Not Applicable.</i>		<b>100</b>	<b>100</b>

\* excluding Health Canada

2.3.2. Quality Assurance Scoring – EUSD Request Fulfilment

**Table 22: Quality Assurance Scoring – EUSD Request Fulfilment**

CATEGORY	CONTENT	POINTS	
		NEW/MODIFY USER / NON-PERSON ACCOUNTS	DELETE USER
MODEL	Was the correct SM9 Model used (i.e. SM9 - New PSPC user model)?	5	5
REQUESTOR LOCATION	Did the agent match the requester identified in the request with the name found in the "Requested for" field in the SM9 task.	5	5
FIELD RELEVANCE	Was the requester identified in the request matched with the name found in the "Requested By" field in the SM9 task.	5	5
REQUESTED DATE	Was the date identified in the "Requested Date" field correct?	5	5
ASSIGNMENT	Was the request task(s) assigned to the proper group?	10	10
DOCUMENTATION	Did the agent document the steps correctly in his/her work in the line item?	10	10
REFERENCE NUMBER	Does the Task number match in both systems, i.e. GCSX/SM9, OSSRO/SM9?	5	5
ASSET	Is the asset indicated in the quote description field the same as the asset detailed in the request.	5	5
ACTIVE DIRECTORY ACCOUNT AND EMAIL	<ul style="list-style-type: none"> <li>Was the following criteria met:                             <ul style="list-style-type: none"> <li>UPN Name follows correct standard</li> <li>Language attribute properly set</li> <li>User created in correct OU</li> </ul> </li> <li>Has reference number been added to AD under general tab Description section and Telephone tab notes section?</li> <li>Generic mailbox created as per ongoing standard as per the KB</li> </ul>	50	-
ACTIVE DIRECTORY ACCOUNT AND EMAIL	<ul style="list-style-type: none"> <li>Were the following actions taken:                             <ul style="list-style-type: none"> <li>AD user correctly moved to Inactive OU</li> <li>Access removed</li> </ul> </li> <li>Has reference number been added to AD under general tab Description section and Telephone tab notes section?</li> </ul>	-	50
<b>TOTAL SCORE</b> <i>All categories must be assessed by the evaluator as either Yes (full points), No (0 points), or Not applicable. Where multiple criteria relate to a single category, "Yes" must be assessed for all applicable criteria in order for any points to be awarded for the given category. For the purposes of calculating agent performance percentage (points awarded divided by total available points), the total available points must be reduced for questions assessed as Not Applicable.</i>		100	100

### 2.3.3. Quality Assurance Scoring – ESD Calls

**Table 23: Quality Assurance – ESD Calls**

CATEGORY	CONTENT	POINTS	
		Incident	RFL
LANGUAGE	Did the agent answer the call in the language of the IVR selection?	5	5
OPENING PART 1: GREETING	Did the agent greet the caller as per the opening script (completing <u>all</u> of the applicable steps below)?	5	5
	<ul style="list-style-type: none"> <li>Greet + include keyword 'ENTERPRISE' to identify the desk reached;</li> </ul>		
	<ul style="list-style-type: none"> <li>Agent identifies himself/herself; and</li> <li>Initiate Questions; Telephone and Email.</li> </ul>		
OPENING PART 2: CONTACT INFORMATION	Did agent follow the sequence and complete all points of the second portion of the call scrip (completing <u>all</u> of the applicable steps below)?	5	5
	<ul style="list-style-type: none"> <li>Department;</li> </ul>		
	<ul style="list-style-type: none"> <li>Role;</li> </ul>		
	<ul style="list-style-type: none"> <li>Partner Service Desk phone number; and</li> <li>Reason for the Call.</li> </ul>		
PROBING AND FIVE Ws	Did the agent employ effective probing skills (5Ws) (to confirm any exceptional processing needs, or validate the scope, location, impact and specific application or service if needed)?	10	10
EFFECTIVE, ACCURATE, LISTENING SERVICE	Did agent demonstrate an accurate understanding of the call by employing paraphrasing techniques?	5	5
	Did agent validate technical/critical data items with phonetic alphabet disambiguation techniques?		
TECHNICAL AUDIO	Was the agent's; Headset, and Mic in good working condition (i.e. no static, low volume)?	1	1
CLEAR VOICE	Did the agent speak clearly (i.e. good pronunciation, no mumbling)?	2	2
CALL TONE AND CONFIDENCE	Did the agent convey a professional attitude, leading the caller to believe that the matter is being handled appropriately (i.e. conveys the impression they are knowledgeable, answers questions accurately as per process, etc)?	5	5
HOLD PROCESS	Did the agent follow the hold process? Where hold process not used, did the agent use audible feedback for steps taken with maximum 60 seconds silence?	5	5
	Did the agent complete <u>all</u> of the applicable steps below?		
	<ul style="list-style-type: none"> <li>Hold initiation Script was used;</li> </ul>		
	<ul style="list-style-type: none"> <li>HCCS Button was used;</li> </ul>		
	<ul style="list-style-type: none"> <li>Hold was for less than 4 minutes; and</li> <li>Return from Hold script was used.</li> </ul>		
TICKET NUMBER	Did the agent provide the reference number to the caller?	5	5
CLOSING SCRIPT	Did the agent follow the remainder of the closing script?	2	2
ITSM TOOL	Did the agent open or update the ticket in the appropriate ITSM tool?	5	
TICKET MODULE & TEMPLATE SELECTION	Did the agent use appropriate ticket module/ticket template for the tool used?	10	
TEMPLATE FIELD ACCURACY	Did the agent complete all required fields in the template?	5	
	Did the agent complete the fields accurately?		
SUMMARY LINE (SHORT DESCRIPTION)	Did the agent follow the ticket summary/title format per the process?	1	
CLIENT/CUSTOMER ONYX FIELDS	Did the agent select the proper Client/Partner?	5	

CATEGORY	CONTENT	POINTS		
		Incident	RFL	
AFFECTED SERVICE	Did the agent identify the correct application and/or service?	2		
AFFECTED LOCATION	Did the agent correctly determine the site location?	2		
IMEA PA LOG	Did the agent complete the IMEA and copy the resulting priority assessment to a work log?	5		
IC ACTIVATION	Was the IC activation E-mail sent out within 15 minutes and a log added?	2		
MANUAL ASSIGNMENT LOG	Did the agent log the justification for their assignment?	1		
INTAKE LOG; DATE/TIME	Did the agent complete the Call Template log without typos and accurately reflect the information provided? *When evaluating Typos consider the potential and real impact of Typo's.	2		
	Did the agent update the Reported Date?			
	Was the proper Reported Source selected based on first contact? Where a call follows an email, did the agent correctly use Email as the reported source?			
PSD TICKET # FIELD	Was the Partner Service Desk ticket number added to the relevant field?	10		
	Was N/A entered if not provided?			
ON BEHALF OF	Was the proper Collab Group and "On behalf of" selected?		10	
	Was the caller identified in the request match the name in the customer field?		10	
TILE SELECTION	Was the proper tile selected?		10	
REQUESTOR/SERVICE RECIPIENT	Was the proper Requestor/Service Recipient selected?		10	
	Does the caller identified in the request match with the name found in the "Contact"?			
PSD TICKET #	Was the correct Partner Service Desk ticket number added in the proper field?		10	
FORM FIELDS ACCURACY	Were the steps documented correctly?		10	
	Were all questions answered properly?			
<b>TOTAL SCORE</b> <i>All categories must be assessed by the evaluator as either Yes (full points), No (0 points), or Not applicable. Where multiple criteria relate to a single category, "Yes" must be assessed for all applicable criteria in order for any points to be awarded for the given category. For the purposes of calculating agent performance percentage (points awarded divided by total available points), the total available points must be reduced for questions assessed as Not Applicable.</i>			<b>100</b>	<b>100</b>

### 2.3.4. Quality Assurance Scoring – ESD Emails

**Table 24: Quality Assurance – ESD Emails**

CATEGORY	CONTENT	POINTS	
		Incident	RFL
TICKET NUMBER IN SUBJECT	Was the appropriate ticket number added to the subject line of the e-mail (after processing/replying)?	5	5
FORMAT	Was the ticket number format in line as defined in the process (i.e. /*444444*/ OR /*REQ000000345678*/ OR /*04544444*/ etc.)?	5	5
REPLIED	Did the agent reply to the email with the appropriate reply template?	10	10
REPLY'S TICKET NUMBER FORMAT	Was the ticket number provided to sender as defined in the process?	5	5
SIGNATURE	Was the signature block in line with the process (i.e. Name, Role, Team Contacts, Bilingual etc.)?	1	1
REPLY LANGUAGE	Did the agent reply in the appropriate language?	5	5
SUBJECT INTACT	Was the subject line left intact (apart from adding the ticket number)?	5	5
TO; CC FIELDS PER KB	Was the TO or CC line edited in accordance with the process?	2	2
EMAIL'S ANALYSIS	Did the agent make an appropriate assessment of the required action(s)?	10	10
COPY FULL HEADER	When copying an e-mail into a ticket, was the full header information included?	2	2
ITSM TOOL	Did the agent open or update the ticket in the appropriate ITSM tool?	5	
TICKET MODULE & TEMPLATE SELECTION	Did the agent use appropriate ticket module/ticket template for the tool used?	10	
TEMPLATE FIELD ACCURACY	Did the agent complete all required fields in the template?	5	
	Did the agent complete the fields accurately?		
SUMMARY LINE (SHORT DESCRIPTION)	Did the agent follow the ticket summary/title format per the process?	1	
CLIENT/CUSTOMER ONYX FIELDS	Did the agent select the proper Client/Partner?	5	
AFFECTED SERVICE	Did the agent identify the correct application and/or service?	2	
AFFECTED LOCATION	Did the agent correctly determine the site location?	2	
IMEA PA LOG	Did the agent complete the IMEA and copy the resulting priority assessment to a work log?	5	
IC ACTIVATION	Was the IC activation E-mail sent out within 15 minutes and a log added?	2	
MANUAL ASSIGNMENT LOG	Did the agent log the justification for their assignment?	1	
INTAKE LOG; DATE/TIME	Did the agent complete the Template log without typos and accurately reflect the information provided? *When evaluating Typos consider the potential and real impact of Typo's.	2	
	Did the agent update the Reported Date?		
	Was the proper Reported Source selected?		
PSD TICKET # FIELD	Was the Partner Service Desk ticket number added to the relevant field?	10	
	Was N/A entered if not provided?		
ON BEHALF OF	Was the proper Collab Group and "On behalf of" selected?		10
	Was the caller identified in the request match the name in the customer field?		
TILE SELECTION	Was the proper tile selected?		10
	Was the proper Requestor/Service Recipient selected?		10

CATEGORY	CONTENT	POINTS	
		Incident	RFL
REQUESTOR/SER VICE RECIPIENT	Does the caller identified in the request match with the name found in the "Contact"?		
PSD TICKET #	Was the correct Partner Service Desk ticket number added in the proper field?		10
FORM FIELDS ACCURACY	Were the steps documented correctly? Were all questions answered properly?		10
<b>TOTAL SCORE</b> <i>All categories must be assessed by the evaluator as either Yes (full points), No (0 points), or Not applicable. Where multiple criteria relate to a single category, "Yes" must be assessed for all applicable criteria in order for any points to be awarded for the given category. For the purposes of calculating agent performance percentage (points awarded divided by total available points), the total available points must be reduced for questions assessed as Not Applicable.</i>		<b>100</b>	<b>100</b>

### 3. Resource Performance Metrics Monitoring

The following describes the Resource Performance Metrics Monitoring process:

#### 3.1. Agent/Administrator Scorecards

Month-to-date Agent/Administrator Scorecards are produced on a daily basis for the following:

- i. EUSD (excluding Health Canada);
- ii. Health Canada;
- iii. EUSD RFL; and
- iv. ESD.

The month-to-date Agent/Administrator Scorecards report the key performance metrics detailed in ANNEX A SOW: Appendix D Section 2.1 Agent/Administrator Scorecards for each agent/administrator.

Agents/administrators are given a percentile ranking (against their peers) for each key performance metric, in addition to an overall percentile ranking (against their peers) which is based on the application of weighting factors to the agent's/administrator's percentile rankings for each key performance metric.

The Quality Assurance score that is included in the Agent Scorecard is from the prior month and remains static for each day of the month.

Overall percentage rankings of agents/administrators are reviewed each day by team leads and the bottom five (5) ranked agents/administrators for each team are flagged for follow-up by the respective team lead, as follows:

#### 3.2. Team Lead Follow-up

On a daily basis, team leads must meet with the five lowest ranked members of their respective teams (based on month-to-date performance rankings including performance metrics up to and including the preceding day) to discuss their rankings, and to provide feedback and coaching to assist agent/administrators to align performance with expectations. Team leads document their meetings with agent/administrators in the Scorecard Coaching Tracker.

In their conversations with the agents/administrators, team leads can make reference to the Agent/Administrator Scorecards in addition to the specific information available in the Agent Report Cards which are detailed in ANNEX A SOW: Appendix D Section 2.2 Agent Report Cards.

#### 3.3. Enduring Performance Issues

Where an agent/administrator is consistently in the bottom rankings for their team, the following actions will be taken by the team lead:

- i. Productivity Improvement Plan (PIP): the team lead will prepare a PIP for agents/administrators consistently performing in the bottom five rankings of their team (5 or more instances in any rolling 30-day period);
- ii. Warning: agents/administrators who do not demonstrate a marked improvement in performance within a reasonable period of receiving a PIP (30 Days) will be issued a warning that termination is imminent; and

- iii. Termination: where agents/administrators continue to show little marked improvement in performance within a reasonable period of receiving a warning (30 Days) will be removed from the engagement.

#### 4. EUSD Call Statistics Review

The Call Daily Report is produced on a daily basis for the EUSD. The statistics reported are described in ANNEX A SOW: Appendix D Agent Report Cards Section 2.3 - EUSD Daily Calls Report. The EUSD Service Delivery Manager and Team Leads review call statistics by agent to identify operational issues and/or agents operating outside the normal range by examining, among other things:

- Volume of Agent Calls Handled;
- Agent Off Call Time; and
- Individual Call Statistics.

#### 5. Problematic Interactions

Problematic interactions are those interactions that are brought to the attention of SSC through any means, including but not limited to:

- Customer Satisfaction Survey (CSAT) feedback;
- Partner feedback;
- Other means (e.g. personal experiences of SSC personnel etc.).

Problematic interactions shall be investigated by SSC Managers and the Service Delivery Manager, with the following information forwarded to the Quality Assurance Analyst for documentation in the Problematic Interactions Log as follows:

- interaction details (i.e. time of occurrence, Agent/Administrator responsible etc.);
- actions taken to investigate the Problematic Interaction;
- investigation findings; and
- follow-up action(s) (if applicable).



## APPENDIX G TIMING OF REPORTING, MEETINGS AND EVENTS

### 1. Initial / Transition Reporting and Events

The following section lists the schedule associated with initial / transition reporting and events described in the referenced SOW Sections and Appendices.

**Table 25: Initial / Transition Reporting and Events**

	<b>TRANSITION REPORTING / EVENTS</b>	<b>CATEGORY</b>	<b>FREQUENCY</b>	<b>DEADLINE</b>	<b>REFERENCE</b>
1	Draft Transition Plan	Document	One-Time	Bid Close	RFP Attachment 4.1 Technical Criteria
2	Distributed Workforce ("DW Approach")	Document	One-Time	Bid Close	RFP Attachment 4.1 Technical Criteria
3	Business Continuity Planning and Disaster Recovery Plan (BCP & DR Plan)	Document	One-Time	Bid Close	RFP Attachment 4.1 Technical Criteria
4	Final Transition Project Plan	Document	One-Time	30 FGWDs from Contract Award	ANNEX A SOW Section 5.0
5	Weekly "Transition-in" Report	Document	Weekly	Monday	ANNEX A SOW Section 5.0

## 2. Periodic Reporting and Events

The following section lists the schedule associated with periodic reporting and events described in the referenced SOW Sections and Appendices.

**Table 26: Periodic Reporting and Events**

	<b>PERIODIC REPORTING / EVENTS</b>	<b>CATEGORY</b>	<b>FREQUENCY</b>	<b>DEADLINE</b>	<b>REFERENCE</b>
1	Prior Day [with month-to-date] EUSD Key Performance Indicators	Reporting	Daily	Next FGWD	ANNEX A SOW: Appendix D Section 1.0
2	Prior Day [with month-to-date] ESD Key Performance Indicators	Reporting	Daily	Next FGWD	ANNEX A SOW: Appendix D Section 1.0
3	Total Month [with prior 12 months] EUSD Key Performance Indicators	Reporting	Monthly	One (1) FGWDs after end of each month	ANNEX A SOW: Appendix D Section 1.0
4	Total Month [with prior 12 months] ESD Key Performance Indicators	Reporting	Monthly	One (1) FGWDs after end of each month	ANNEX A SOW: Appendix D Section 1.0
5	Month-to-date EUSD Agent Scorecards	Reporting	Daily	Next FGWD	ANNEX A SOW: Appendix D Section 2.1
6	Month-to-date Health Canada Agent Scorecards	Reporting	Daily	Next FGWD	ANNEX A SOW: Appendix D Section 2.1
7	Month-to-date RFL Administrator Scorecards	Reporting	Daily	Next FGWD	ANNEX A SOW: Appendix D Section 2.1
8	Month-to-date ESD Agent Scorecards	Reporting	Daily	Next FGWD	ANNEX A SOW: Appendix D Section 2.1
9	Daily EUSD Agent Report Cards	Reporting	Daily	Next FGWD	ANNEX A SOW: Appendix D Section 2.2
10	Daily ESD Agent Report Cards	Reporting	Daily	Next FGWD	ANNEX A SOW: Appendix D Section 2.2
11	EUSD Daily Calls Report	Reporting	Daily	Next FGWD	ANNEX A SOW: Appendix D Section 2.3
12	Daily Staffing Reports	Reporting	Daily	Next FGWD for review daily by SSC and presented at bi-weekly Business Touch Base Meeting	ANNEX A SOW: Appendix D Section 3.0
13	Monthly Staffing Reports	Reporting	Monthly	Next FGWD (presented at monthly Service Management Committee Meeting)	ANNEX A SOW: Appendix D Section 3.0
14	Month-to-date EUSD Service Level Objective Categories against SLO Targets	Reporting	Daily	Next FGWD (presented at EUSD daily Service Operations Team Meetings)	ANNEX A SOW: Appendix C Section 1.0

	<b>PERIODIC REPORTING / EVENTS</b>	<b>CATEGORY</b>	<b>FREQUENCY</b>	<b>DEADLINE</b>	<b>REFERENCE</b>
15	Month-to-date ESD Service Level Objective Categories against SLO Targets	Reporting	Weekly	Next FGWD (presented at ESD weekly Manager's One-on-One Meetings)	ANNEX A SOW: Appendix C Section 1.0
16	Service Level Agreement Reporting (SLA)	Reporting	Monthly	Five (5) FGWDs after end of each month (presented at monthly Service Management Committee Meetings)	ANNEX A SOW: Appendix E Section 2.2
17	Quality Assurance Scoring - EUSD Calls	Reporting	Monthly	One (1) FGWDs after end of each month	ANNEX A SOW: Appendix F Section 3.1.1
18	Quality Assurance Scoring - Health Canada Calls	Reporting	Monthly	One (1) FGWDs after end of each month	ANNEX A SOW: Appendix F Section 3.1.1
19	Quality Assurance Scoring - Request Fulfilment	Reporting	Monthly	One (1) FGWDs after end of each month	ANNEX A SOW: Appendix F Section 3.1.1
20	Quality Assurance Scoring - ESD Calls / Tickets	Reporting	Monthly	One (1) FGWDs after end of each month	ANNEX A SOW: Appendix F Section 3.1.1
21	EUSD Service Operations Team (SOT)	Event	Daily	Scheduled	ANNEX A SOW: Appendix C Section 1.0
22	ESD Weekly Manager Meeting	Event	Weekly	Scheduled	ANNEX A SOW: Appendix C Section 1.0
23	ESD Manager's One-on-One	Event	Twice a Week	Scheduled	ANNEX A SOW: Appendix C Section 1.0
24	Business Touch Base	Event	Bi-Weekly	Scheduled	ANNEX A SOW: Appendix C Section 1.0
25	Service Management Committee (SMC)	Event	Monthly	Scheduled	ANNEX A SOW: Appendix C Section 1.0
26	Service Executive Committee (SEC)	Event	Quarterly	Scheduled	ANNEX A SOW: Appendix C Section 1.0

### 3. Ad Hoc Reporting and Events

The following section lists the schedule associated with Ad Hoc reporting and events described in the referenced SOW Sections and Appendices.

**Table 27: Ad Hoc Reporting and Events**

	<b>AD HOC REPORTING / EVENTS</b>	<b>CATEGORY</b>	<b>FREQUENCY</b>	<b>DEADLINE</b>	<b>REFERENCE</b>
1	Immediate notification of realized or imminent failure to meet Minimum Service Level in any Service Level Category	Reporting	As Required	Immediate	ANNEX A SOW: Appendix E Section 2.1
2	AD Hoc Service Management Committee (SMC) to Review RCA Report resulting from and SLA Failure	Event	As Required	Within five (5) FGWDs after reporting an SLA Failure	ANNEX A SOW: Appendix C Section 1.0
3	Root Cause Analysis Report (RCA Report)	Reporting	As Required	Presented at SMC Meeting convened to review RCA Report	ANNEX A SOW: Appendix E Section 2.3
4	Corrective Action Plan (CAP)	Event	As Required	Within five (5) FGWDs after presentation of the RCA Report	ANNEX A SOW: Appendix E Section 2.3
5	Implementation of CAP	Event	As Required	Within twenty (20) FGWDs from presentation of the CAP	ANNEX A SOW: Appendix E Section 2.3
6	Progress Reports against the CAP	Event	Bi-Weekly	Provided at Business Touch Base Meetings	ANNEX A SOW: Appendix E Section 2.3

## APPENDIX H FINANCIAL RESPONSIBILITIES MATRIX

## 1. Financial Responsibilities

This appendix assigns financial responsibilities to SSC or the Service Provider for costs associated with the delivery of services. Where financial responsibility has been assigned to the Service Provider by an “x”, it is the Proponents responsibility to ensure that the related costs are incorporated into their financial proposal for recovery through “per diem unit prices for services”, “facilities costs” and/or “transition costs”.

**Table 28: Financial Responsibilities Matrix**

CATEGORY	DESCRIPTION	EUSD		ESD		ECC	
		SSC	Service Provider	SSC	Service Provider	SSC	Service Provider
<b>Service Desk Equipment*</b>	Laptop	x		x		x	
	Monitor(s) / Docking Port	x		x		x	
	Softphone/Headset	x		x		x	
	Token/device for Third Party Second Factor Authenticator Application	x		x		x	
<b>Voice Equipment*</b>	Contact Centre Telephony Solution	x		x		x	
	Toll-Free Number(s)	x		x		x	
<b>Desktop Software**</b>	Microsoft Windows Operating System	x		x		x	
	Internet Browser(s) (and necessary plug-ins)	x		x		x	
	Office Productivity Software	x		x		x	
	Security Software	x		x		x	
	Third Party Second Factor Authenticator Application	x		x		x	
<b>Service Desk Tools**</b>	Microsoft Office Professional (Outlook, Word, Excel, Access)	x		x		x	
	Video-conferencing / Collaboration Software	x		x		x	
	ITSM Tools	x		x		x	
	Remote Takeover Tools	x		x		x	
	Account Administration Tools	x		x		x	
	Knowledge Databases	x		x		x	
	SpeechMiner Database	x		x		x	
	User Productivity Tools	x		x		x	
<b>Facilities</b>	Workforce Management Tools		x		x		x
	Cubicle/chair		x		x		x
	All facilities costs including, but not limited to, security accreditation, cost to meeting DR and BCP requirements, leasehold improvements, maintenance, capacity upgrades, physical security, fire suppression, insurance, power and electrical, HVAC, cabling etc.		x		x	x	
<b>Office Supplies</b>	[In the event of personnel working remotely from home] reimbursement to personnel for associated costs including, but not limited to, hydro, space, internet etc.		x		x		Na
	Stationary		x		x	x	
<b>Network Equipment</b>	GC WAN Hardware	x		x		x	
	Internet Connectivity (Service Provider to SSC)		x		x	x	
<b>Personnel Related</b>	All personnel related costs including, but not limited to, recruitment, security clearance, training, salaries & benefits, retention, severance, cost of living adjustments, travel, workplace safety (e.g. Co-Vid19 masks) & insurance premium etc.		x		x		x

CATEGORY	DESCRIPTION	EUSD		ESD		ECC	
		SSC	Service Provider	SSC	Service Provider	SSC	Service Provider
Transition In / Out	All transition related costs including, but not limited to knowledge transfer, salaries & benefits etc.		x		x		x

\* Includes cost of initial hardware purchase + maintenance + refresh + ongoing support

\*\* Includes cost of initial license purchase + maintenance + refresh or upgrade + ongoing support