



Request for Proposals ***Saskatchewan Government and General Employees' Union***

Request for Proposal

The Saskatchewan Government and General Employee's Union (SGEU) is seeking competitive proposals from qualified firms to act as our Microsoft agreement specialist, procurement, and implementation partner.

SGEU IT Department

RFP Reference Number: SGEU #2024-03

Release Date: March 15, 2024

Closing Date: April 19, 2024 at 12:00 noon Saskatchewan Time

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1.0 PROCEDURES AND INSTRUCTIONS

1.1 Purpose

The Saskatchewan Government and General Employees' Union ("SGEU") are seeking a Microsoft partner to move forward with utilizing the Microsoft cloud solution provider model to continue our journey to the cloud with Microsoft's additional service offerings and act as our Microsoft agreement specialist, procurement and implementation partner. The first Microsoft service offering project we are looking to expand is the migration from our current on-premises telephony solution to the Microsoft Teams telephony environment in all 3 of our locations in Saskatchewan. The project scope is provided in Section 2.

Background

SGEU currently procures Microsoft licensing directly from Microsoft. SGEU has existing Office 365 licensing in place and have transitioned to the Microsoft cloud for a variety of Microsoft's modern work services including but not limited to: email, file storage, collaboration and cloud security. SGEU also has transitioned some services to the Microsoft Azure environment.

1.2 Issuing Office

1011 N Devonshire Drive
Regina, Saskatchewan
S4X 2X4

Attention: Richard Schramm, Director
Phone: 306.775.7214
Email: rschramm@sgeu.org

1.3 Closing Date and Time

The offeror proposal, signed by the offeror's authorized representative, must be received by 12:00 noon in the issuing office on April 19, 2024 and marked **RFP#2024-03**.

Proposals received after the deadline date and time will not be considered. **ONLY WRITTEN SUBMISSIONS WILL BE ACCEPTED. ELECTRONIC OR FAXED SUBMISSIONS WILL NOT BE ACCEPTED.**

1.4 RFP Process

Upon closing, SGEU will review all proposals for completeness and compliance with the requirements of this RFP. Incomplete proposals will be rejected and will receive no further consideration. The result will be a "short list" of offerors who will be further evaluated to ensure compliance with the specifications and in accordance with the evaluation criteria identified in this RFP.

1.5 Key Dates

Release of RFP	
Confirmation of Intent to Participate Form (Appendix A)	As soon as possible
Deadline for RFP Clarifying Question Inquires	April 5, 2024
Deadline for RFP proposal submissions	April 19, 2024
Screening (“Short list”) applications	April 30, 2024
Presentations (if required) – notification will be provided to Offerors on May 3, 2024	May 9, 2024 (tentative)
Award of contract	TBA
Contract commencement	TBA

Key dates are tentative and may be changed by SGEU at any time.

1.6 Inquiries and Changes

It is the responsibility of each offeror to inquire about and clarify any requirements of this RFP that are not understood, in writing. If an offeror discovers any inconsistency, discrepancy, ambiguity, errors or omissions in this RFP, the offeror must notify the Issuing Office immediately. Inquiries, interpretations, and questions regarding the requirements of this RFP are to be directed to the Issuing Office (see Article 1.2). Contacts are restricted to the Issuing Office. Contact with individuals other than those listed above may result in bid disqualification.

Amendments to proposals will be accepted if received in writing prior to the proposal closing date and time (Article 1.3). Proposals may be withdrawn upon written request from the offeror.

1.7 Clarification Questions

All clarification questions from the offeror in regard to product and service requirements must be made in writing by email to Jeff Wood, Director of Membership Information Services and Information Technology – jwood@sgeu.org with cc to Paulette Kidd – pkidd@sgeu.org no later than April 5, 2024. Responses to the questions will be provided to all potential offerors who have completed and returned the Confirmation of Intent to Participate Form (Appendix A). Any clarification questions received from offerors after this time will not be answered.

1.8 Irrevocable Offer

Proposals shall constitute a valid and irrevocable offer which is open for acceptance by SGEU for a period of 90 days following the closing date and time specified in Article 1.3. SGEU will not be liable under any order/contract in connection with this RFP, or the submission of proposals, unless and until SGEU has an agreed upon contract or proposal in writing.

1.9 Acceptance or Rejection Proposals

SGEU reserves the right to accept the proposal which it deems most advantageous and the right to reject any or all proposals, in whole or in part, whether the prices offered are the lowest or not. SGEU is under no obligation to award an order/contract and reserves the right to terminate the proposal process at any time, and to withdraw from discussions with any or all of the offerors who have responded.

1.10 Selection Process

SGEU intends to select the most comprehensive, qualified, and cost-effective, best value proposal based on the evaluation of the responses to this RFP. Upon receipt of the responses, SGEU will screen each response to ensure compliance with the specifications of the RFP. After initial screening SGEU will analyze the responses to the individual requirements. Ratings will remain confidential, and no totals or scores of the evaluation will be released to any offeror.

1.11 Cost Structure

Costs must be shown in Canadian dollars, Goods and Services Tax (GST) and Provincial Sales Tax (PST) excluded.

Cost structure considerations addressed in the proposal are to include a description of fees (including administration), commissions, rebates, asset-based fees, and any other fees that are contained within your proposal.

1.12 Indemnity

The offeror shall indemnify SGEU for all damage suffered by SGEU as a result of negligent actions or wrongful acts of the offeror, its employees, servants and/or agents. The offeror shall indemnify and hold harmless SGEU, its respective board of directors, employees, servants and/or agents from all claims, demands, losses, costs, damages, actions, suits, or proceedings initiated by third parties arising from the negligence of the offeror, its employees, servants, and/or agents or rising directly as a result of the project.

1.13 Permits, Licenses, Notice, Laws and Rules

The offeror shall obtain and cover the costs for all permits, licenses that are necessary for the execution of the project, including liability for all applicable taxes; shall give notices and comply with all laws, ordinances, codes, rules and regulations bearing on the conduct of the project; and shall pay all fees required by law.

1.14 Governing Law

The order/contract shall be subject to and governed by and interpreted in accordance with the laws of Canada and the Province of Saskatchewan.

1.15 Conflict of Interest

The successful offeror shall not undertake an assignment that actually or potentially creates a conflict of interest with the provision of the goods and related services without having first disclosed to SGEU the actual or potential conflict of interest.

1.16 External Marketing

The offeror shall not use the name of SGEU for any external marketing purposes whatsoever without express written permission from the SGEU.

1.17 Survival

The terms, conditions, representations and warranties contained in the order/contract shall survive the termination or expiration of the order/contract.

1.18 Insurance Requirements

a. Commercial General Liability Insurance:

With a limit of not less than two million dollars (\$2,000,000.00) inclusive per occurrence for bodily injury (including death), and damage to property including loss of use thereof. Such insurance shall include coverage for broad form property damage, contractual liability, completed operations, product liability and non-owned automobiles.

Copies of the certificate of insurance will be required upon finalization of contract with selected offeror.

1.19 Workers Compensation Coverage

A copy of a letter of good standing and clearance from WCB will be required upon finalization of contract with the selected offeror.

1.20 Time Disputes

In the event of a dispute regarding time, SGEU's time clock will govern.

2.0 PROJECT SCOPE AND REQUIREMENTS

2.1 Requirements

To be considered for this project, offerors must:

- Be a Microsoft licensing specialist.
- Have the ability to procure Microsoft licensing for SGEU.
- Have the ability to provide Microsoft cloud services support.
- Have previous experience in implementing Microsoft modern workplace advancement projects.

This request for the proposal's project is to transition Microsoft Teams for telephony from the current on-premises telephony solution.

Future potential projects outside of this RFP include:

- Microsoft modern workplace projects, including but not limited to: Endpoint Manager (Intune) expansion, License changes, Windows 11 migration, SharePoint online, Viva, etc.
- Generative Artificial Intelligence

2.2 Scope of Services – Microsoft Teams Project – Transition to Microsoft Teams for telephony

The purpose of this project is to replace SGEU's existing legacy telephony PBX system with a cloud-based unified communication solution that integrates voice, video, chat, and collaboration features. The scope of work includes the following:

Design and configure the Microsoft Teams telephony system according to our requirements and best practices. Our requirements include:

- Assessing our current IT infrastructure and network capacity
- Planning and designing the Microsoft Teams deployment strategy, including licensing expertise and advice for recommended licensing changes
- Configuring and customizing Microsoft Teams settings and features
- Support for at least 20 concurrent calls across our 3 locations to start with and the seamless ability to add capacity if required
- Integration with our Hybrid Azure Entra, On-Premise Active Directory and Hybrid Exchange Online environment
- Compliance with our security and privacy policies
- Ability to customize call flows, greetings, menus, queues, hunt/ring groups and reception interface(s), cold and warm transfers, multi-line capabilities, busy status monitoring, internal dialing plans across physical offices.
- Availability of advanced features such as call recording, transcription, single number reach, shared voicemail, analytics, and reporting
- Migration of our existing phone numbers, SIP trunking, extensions, voicemail, 1-800 lines, and call routing settings to the new system. We have approximately 130 phone numbers and extensions across 3 locations.
- Provide two levels of training and documentation, user adoption training for staff and administrator training for system administrators. SGEU has approximately 80 staff members and 4 administrators with different levels of proficiency and needs.
- Provide support for administrators and escalation to Microsoft on behalf of SGEU for issues.
- Monitor and troubleshoot the performance and quality and adoption of the system during and after the implementation. We expect a minimum uptime of 99.9% and a maximum latency of 100 ms.
- Documented final state of environment and disaster recovery configuration steps and requirements testing

2.3 Proposal Requirements

(a) The documentation for each proposal:

- (i) Must be submitted in a sealed envelope or container displaying a full and correct return address.
 - (ii) Must consist of one (1) original (clearly marked as such on its first page) hard copy, five (5) duplicate hard copies, and one (1) electronic copy (maybe provided by email through a secure email platform or memory stick) of the main proposal document as described in the section below; and
 - (iii) Must be delivered no later than the deadline to SGEU's Representative, Richard Schramm, Director of Finance, SGEU, 1011 N Devonshire Drive, Regina, Saskatchewan, S4X 2X4.
- (b) Delays caused by any delivery service (including Canada Post and courier) shall not be grounds for any extension of the deadline, and proposals that arrive after the deadline will not be accepted.

Proposals shall include, at a minimum, the following:

1. General background information about your firm, number of years in business, provincial location(s);
2. A project plan with milestones, deliverables, and timelines;
3. A description of the user transition and onboarding plan including both hardware and software;
4. A detailed description of the proposed Microsoft partnership between the company and SGEU. Including details of the Teams/telephony initial project solution, including the features, benefits, and costs;
3. A description of your insurance coverages including Errors and Omissions, Directors & Officers, Fiduciary Liability, including names of carriers and limits;
4. Your privacy policy with regard to sharing plan information to outside parties;
6. A full and complete description of the services you will and will not provide for each of the items listed under "Scope of Work" above. Include your fee structure, or other pricing arrangements for annual plan administration fees itemized by base fees, if applicable, and/or per participant fees.
7. A specimen copy of your client service agreement, contract, or other relevant documents;

3.0 INSTRUCTIONS TO OFFERORS – (MANDATORY REQUIREMENTS)

The offeror must have substantial compliance with all mandatory requirements.

3.1 Response Guidelines

To ensure your bid is considered for evaluation, offerors should ensure bids include the following:

- A complete proposal outlining all required elements,
- An authorized official signature of the offeror's company.

3.2 Security

The selected offeror must verify in writing that all printed information pertaining to SGEU is kept confidential and secure. This also applies to any related reporting and other data provided to SGEU. The offeror must also comply with all applicable privacy laws.

3.3 Past Performance Reference

Offerors must provide three (3) clients of similar size to SGEU, preferably clients of equivalent complexity. References should be for clients with requirements similar to those of SGEU.

Information should include the scope and date of the project, names and address of the client, title and phone number and email address of the contact person.

3.4 Terms and Conditions

Available upon request, must be agreed to at the time of contract signing.

4.0 RFP RESPONSE FORMAT

In order to receive a uniform format of responses from all offerors, the following guidelines for formatting the Proposal have been outlined.

4.1 General Outline

- a) A table of contents of all presented material.
- b) Concise outline of your corporate structure and ownership.
- c) A complete description of the duration and extent of your company's experience in handling similar projects.
- d) Include response for all mandatory requirements (See Articles 2.2 and Article 3.0)
- e) The cost structure, in Canadian dollars (see Article 1.11), for all services.
- f) Responses to required information as presented in this RFP. The offerors shall clearly indicate any specification that cannot be met in its entirety.
- g) Submission of three (3) relevant references.
- h) A summary of any value-added benefits.
- i) Completed Confirmation of Intent to participate (see Appendix A).

4.2 Signing Authority

Offerors' proposals must be dated and signed in the firm or corporate name and must bear the signature of a principal duly authorized to represent the offeror. The offeror's name must be fully stated. Where a proposal is signed by an agent of the offeror, evidence of authority to act as the offeror's agent shall accompany the proposal.

4.3 Innovation – Additional Services

Please indicate any additional value-added possibilities including unique features, and/or incentives. Each value-added submission should be described and priced separately.

5.0 Screening for Presentation (“Short list” of proposals)

The first stage of the evaluation will consist of a review of the proposal to ensure that it is compliant with all mandatory requirements contained in this document. Proposals not considered compliant may be rejected at this stage and no further efforts will be made by the evaluation team.

Screening of proposals will be conducted by the evaluation team on April 30, 2024. Successful offerors will be notified on May 3, 2024.

5.1 Screening Criteria

Mandatory Requirements (must be included in the proposal)
Scope of Services/Proposal Requirements
References provided (see Article 3.4) – three (3) higher complexity clients
Security (see Article 3.2) – statement address security
Respondent's Profile – with signing authority
Receipt of proposal – within stated timeline

6.0 Presentation

Successfully screened offerors will be invited to presentation to the evaluation team on May 9, 2024 (tentative). Presentations may be conducted in person or virtually. The presentation must be given by personnel who will be directly involved in providing the services required. All costs associated with the presentation will be the responsibility of the offeror.

Appendix A –Confirmation of Intent to Participate Form
RFP Reference Number: SGEU #2024-03

Please complete this form and email IMMEDIATELY to:

SGEU

1011 N Devonshire Drive

Regina, Saskatchewan

S4X 2X4

Email: jwood@sgeu.org and cc: pkidd@sgeu.org

Failure to return this form may result in no further communication regarding this Request for Proposal.

Company Name:	
Address:	
Contact person:	
Phone Number:	
Email Address:	

I have received a copy of the above noted Request for Proposal tender. I authorize the SGEU to send further correspondence that it deems to be of an urgent nature by e-mail, as they deem appropriate.

I understand that if I do not submit a proposal, this will not affect our company's status as a potential supplier to SGEU in the future. I also understand that if I do not return this form our firm will not receive any further notice with regard to this Request for Proposal.

I understand that any clarification questions (as per Article 1.6) must be made no later than April 5, 2024.

Please select one of the following:

I will be participating in this formal procurement process.

I will not be participating in this formal procurement process.

Name:		Signature:	
Title:		Date:	