

INVITATION TO REQUEST FOR PROPOSAL (RFP)

IT Service Management (ITSM)



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1. Introduction

1.1 About the Norwegian Red Cross

Norwegian Red Cross is a national association of the world's largest humanitarian aid organization. The International Red Cross and Red Crescent Movement. The organization exists in 190 countries and has around the world approx. 100 million members and volunteers. The basic idea of the Red Cross is to prevent and alleviate human suffering, both in the various countries' local communities and in international conflicts.

Currently, the Red Cross in Norway has about 150,000 members and 50,000 volunteers divided into different activities. The Red Cross is organized with headquarters in Oslo, 19 district offices and over 400 local associations around the country. The number of employees is in excess of 500 nationwide. For further information www.rodekors.no.

1.2 Background

In order to achieve effective and efficient IT service delivery, Norwegian Red Cross has taken the decision to implement IT Service Management solution based on the ITIL framework. To facilitate the delivery of this, Norwegian Red Cross is seeking assistance from ITSM solution integrators in the implementation of an ITSM solution.

1.2.1 Norwegian Red Cross User Profiles

Type	Est. Annual Volume	Description
Employees	750	Located at National Office and District Offices in Norway (in addition, approximately 230 officers are employed on engagement during the summer months).
Volunteers	57,000	These are external users who have a user account (AD)
Donors	70,000	These are external users no user account
Members	130,000	These are external users no user account
General Public	N/A	These are external users no user account

1.3 Goals & Objectives

1.3.1 Service Desk for volunteers

The Norwegian Red Cross wants to establish a service desk for volunteers. This should be one hub where all volunteers associated with the Norwegian Red Cross can ask questions of a different nature.

When it comes to answering all types of questions, it is of great importance that people who are not defined in the Service Desk team can respond to inquiries. Good solutions for communication and contributions from other parties in the organization and partners outside the Norwegian Red Cross are important.

1.3.2 Whistleblowing

The Norwegian Red Cross currently has a warning channel for "unwanted incidents". It is desirable that inquiries of such nature be collected and processed in a tool adapted to this such as the ITSM solution. Everything reported here should be treated confidentially.

1.3.3 Purchasing

The Norwegian Red Cross has a central purchasing department for employees. Requests for purchases are to be gathered in an ITSM tool for processing and communication.

1.3.4 IT Department

The IT department will be using the ITSM solution where relevant, based on internal needs.

1.3.5 Existing Service Desk Instances

Norwegian Red Cross currently is hosting a Servicedesk solution via Service Cloud for Donors and members. We will evaluate the potential possibility of migrating the Service Desk hosted via Service Cloud in the new ITSM solution.

1.4 Vendor Selection

Red Cross Norway envisions that the process of evaluation will involve meetings with Vendors. Vendor Presentations, and consequently workshops together with potential Implementation Partners.

1.5 Establishing Cost Estimates

1.5.1 Licensing costs

The Vendor must submit an overview over which modules and seat licenses that will be required for implementation of ITSM solution.

1.5.2 Infrastructure costs

The Vendor must provide an overview over which (if any) local, or IaaS / PaaS Cloud-based infrastructure will be needed for the ITSM Solution.

1.5.3 Implementation costs

The Vendor is encouraged to suggest/bring in contact with implementation partners for the Norwegian Red Cross, who should assist with estimating the cost of implementation for the various stages.

1.6 Milestones and Deliverables

The Norwegian Red Cross will invite relevant Vendors to give a more detailed presentation and review of their proposals in Meetings and Workshops, when cost estimates (licensing, infrastructure) has been established.

#	Activity	Responsibility	Format	Date
1	Send out RFP	Norwegian Red Cross	e-mail	20.06.2019
2	Q&A	Joint	e-mail & verbal	30.07.2019
3	RFP Submission	Vendor	e-mail	30.08.2019
4	Vendor Presentations	Vendor	Meetings	05.09.2019- 19.09.2019
5	Shortlisting and selection of final Vendor	Norwegian Red Cross	N/A	20.09.2019- 27.09.2019
6	Contract negotiations and signing	Joint	Meetings/Documentation	30.09.2019- 11.10.2019

2 Criteria for selection of Vendor(s)

When selecting the Vendor, the following criteria will be considered (not in any specific order of priority):

- Product functionality and user-friendliness
- Integrations
- Price and payment model
- Availability and quality
- Service and support including implementation, consulting and training
- Vendor Competence/references
- Vendor Financial health/Credit rating

Norwegian Red Cross retains the right to amend or vary the evaluation criteria at any stage and without notification.

2.1 System and Data location

Please note that the Norwegian Red Cross prefers Cloud Based solutions, first and foremost SaaS, secondly Cloud Based with PaaS/IaaS.

In case of Cloud Storage/Cloud Usage, Data must be stored and governed in a secure, GDPR-compliant manner.

2.2 ITSM Process Requirements

The ITSM solution should provide functionality to support following IT Service Management processes:

1. Change management
2. Incident management
3. Problem management
4. Request fulfilment
5. Service asset and configuration management
6. Service level management
7. Service catalog management
8. Knowledge Management
9. Vendor Management

2.2.1 Functional requirements (User cases)

1. Ability for users (Internal or External) to contact Service Desk via a chat window, email, phone and online form
2. Users have access to a FAQ interface via a web browser (requiring no logon), where they have the ability to create a case in the ITSM solution if necessary, or contact a Service Desk representative via onlineform, chat, email or phone
3. Ability for users to provide feedback against FAQ
4. Service Desk creates a case where an external party receives a url to the case via email, and has the ability to update the case requiring no logon.
5. Popup window based on originating phone number detailing caller information
6. Email Alerts sent to case responsible when nearing or over SLA.
7. Requestor receives an email detailing case information & expected resolution time
8. Requestor has the ability to provide feedback in regards to case handling via a feedback form (post resolution)
9. When there are many similar inquiries in a short time, it should be possible to process them collectively / effectively
10. Service Desk should easily be able to keep track of the status of the various cases
11. Service Desk should easily be able to reuse answers (templates)
12. Easily get an overview of the support history of a caller (so that we do not give the same answer to the same question several times)
13. Ability to submit an anonymous request. This will be treated as a whistle-blower hotline reporting conduct that may be unethical, illegal, a waste of resources, or in violation of professional standards and code of conduct. All reports submitted will be treated confidentially.

2.2.2 Licensing

The scope of the service will includes following (Indicative at this stage):

Usertype	Year 1	Year 2	Year 3	Year 4
Servicedesk agents/system admin	5	15	25	40
Approvers	1	30	50	50
End-users	5000	10000	50000	200000

2.2.3 Integrations

The ITSM solution should provide integration capabilities against the below applications/services in order to meet current & future organizational requirements.

1. Remedy
2. Jira
3. InService
4. ServiceNow
5. MS Dynamics CRM (On premise)
6. Email (we use Office365)
7. SCCM
8. Microsoft InTune
9. ServiceCloud
10. Support for OpenAPI
11. Telephony (Telia Minbedrift)

2.2.4 Support and maintenance

The Vendor shall provide the following support and maintenance for its product:

- Ongoing application maintenance and support training
- Warranty support for all software.
- A detailed Service Level Agreement (SLA) as agreed upon by both Norwegian Red Cross and the Vendor
- The Vendor shall provide all technical, operational, and administrative knowledge transfers required for Customer or its 3rd Party personnel to successfully conduct activities related to the deployed solution.
- Technical training materials and classes including both onsite and distance/online delivery.
- Agent training materials and classes including both onsite and distance/online delivery.

2.2.5 Reporting

The ITSM tool should meet the below reporting criteria:

1. Ability to generate reports on FAQ usage, eg. Reporting against the following
 - a. Search words statistics
 - b. Number of times FAQ articles are read (hits)
 - c. Where possible, who has read the FAQ article
2. Ability to retrieve statistics on common types of inquiries, also broken down by district, local associations, roles office, activity association / wish, type of inquiry / category and processes
3. Ability to retrieve statistics on inquiry types, resolution time and category
4. The tool should be able to present management information about the service management processes that are defined within Norwegian Red Cross organization.
5. The tool should be able to provide standard management information reports providing statistical information, progress information and exceptions.

6. All reports must be capable of being viewed on screen or printed.
7. There should be an enquiry facility to produce user-defined management information reports.
8. The Vendor should give insight into the logical data model, needed by the client to produce adhoc reports.
9. It should be possible to present management information in graphical form, either using facilities within the tool(s) or by transferring data in standard format to other utilities.
10. All standard management information reports should be capable of being generated for user defined periods and be capable of reporting life cycles of records (e.g. history of status of incidents or changes over a period of time).

2.2.6 Security

ITSM tool should meet the below security criteria:

- The tool should have security controls in place to allow only authorized staff and users to view, open, modify, authorize and close records based on their role.
- The tool should provide a facility to enable the system manager to assign varying access permissions to categories of staff.
- The tool should provide facilities to prevent unauthorized access to data or controls, for example by user identity and password, with multiple levels of authority and corresponding access permission.
- The tool should support multi-factor authentication.
- The tool should automatically reprocess all transactions completed since the last backup or checkpoint following recoverable failure of its host system, e.g. power failure.
- The tool should support Single-Sign-On to validate user-ids and passwords.

2.3 Implementation Plan

Initial implementation will focus on the following deliverables contained within this RFP as stated in table below, future implementation scope will be determined with vendor.

Table 2.3.1

Item No.	RFP Reference	Service Type	Delivery
1	Section 2.2	ITSM Processes	All items
2	Section 2.2.1	Functional	Functional requirements
3	Section 2.2.3	Integrations	Items 5, 6 & 10
4	Section 2.2.5	Reporting	All Items

The detailed implementation will be worked out in cooperation with the Norwegian Red Cross and should show the level of detail needed to properly manage the project. Items might be:

- Planning per process
- User Requirement specification and validation sessions with selected stakeholders
- User Acceptance Testing (UAT)
- Training

Vendors are required to provide a detailed planning of a typical integration agile project based on the information provided. Please indicate the needed Norwegian Red Cross resources.

Vendors are required to mention the assumptions made regarding this planning.

3 Pricing

Price matrix is enclosed in separate Excel file "ITSM Tab", ref. appendix 1.

- It is noted that several Respondents state the availability of a special pricing models for NGOs such as the Norwegian Red Cross. Respondents may also submit alternative pricing models if relevant.
- Prices are stated exclusive of value added tax and the associated rate.
- Any other extras and costs, eg. invoice fee, must be disclosed and priced.

4 Invoicing

The Norwegian Red Cross has the following requirements to invoicing:

- Electronic invoicing through the format EHF (for Norway based Vendors)
- Invoices shall be marked "bealie" in the buyers reference field. No other fields shall be populated.
- Invoices shall have a 45-day payment term from the date of receipt of the correct invoice
- The Norwegian Red Cross does not pay interest or fees due to invoice requirements not being met.

5 Eligibility Requirements

5.1 Format of Offer

The offer must be delivered electronically in Merccell according to the given structure (for Norway based Vendors). The offer shall not contain brochures or other commercial material unless this has a factual connection in the response to the offer.

5.2 Response documentation requirements

Respondents shall deliver the following in their response with the following structure:

- Cover letter signed by a person authorised to commit Respondent to this RFP
- Vendors shall respond via using the Norwegian Red Cross documents supplied.
- Vendors shall include their Product documentation/standard terms and conditions
- Price template based on Appendix 1 (ITSM Cost Tab)
- Requirements template to be populated within appendix 1 (Requirements tab)
- Any Reservations and Assumptions to the Response
- The following documentation must be enclosed in separate documents:
 - Company name, registration, org. number and address
 - Company presentation
 - Relevant References (at least 3) from similar implementations.

- CVs of planned resources for implementation
- Security documents (Cloud security, DR etc.)
- Credit rating/Financial Report for the last three years
- Other relevant documentation for subcontractors (if relevant)

6. General Terms and Conditions

6.1 Offer Deadline

Offers must be delivered via Merccell by 30.08.2019. Late arrivals may be rejected.

6.2 Offer binding period

The offer must be binding for 6 months from the filing date.

6.3 Communication during the RFP process

Questions to the request should be addressed via the communication module in Merccell. All incoming questions shall be anonymized, and responses shall be published to all participating Vendors in order to ensure equal treatment of all Respondents.

- The Norwegian Red Cross reserves the right to correct and supplement the request within the deadline.
- Notification of changes will be sent to Vendors who have notified an interest to respond to the RFP in Merccell.

6.4 Disclaimers

If Vendor has a reservation against any part or wording in this request, these must be specified in the offer to be valid. Reservations that cannot be cost-calculated may result in the offer being considered incomplete and being rejected.

The awarding of contracts will take place on the basis of which offer is most advantageous for the Norwegian Red Cross.

Contracts may not be awarded to suppliers who, during the acquisition, are either exposed to a conflict of interest, provide incorrect information to the Norwegian Red Cross, or fail to provide information relating to the conditions of participation in the RFP process. If such cases arise at a later date, the Norwegian Red Cross is entitled to terminate the contract by giving the Contractor written notice of such termination.

6.5 Cancellation of RFP

The Norwegian Red Cross reserves the right to cancel the RFP or to reject all offers.

6.6 Confidentiality

This invitation to RFP with enclosures is the property of the Norwegian Red Cross and must not be reproduced beyond what is necessary for internal consideration. The documents cannot be used or disclosed to a third party without the Norwegian Red Cross's written consent. The parties undertake to maintain confidentiality in relation to the content of proposals and documents used in the competitive proposal procedure and information they may receive about each other and each other's business.

7 Appendices

Refer to Appendix 1 attached to this request.