Call for Participants: ITIL® Update

October 2009

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1   Introduction

Summary of Requirement

1.1   The Office of Government Commerce (OGC) and The Stationery Office (TSO), the official publisher for the OGC, are seeking participants for the update of the five core publications (Service Strategy, Service Design, Service Transition, Service Operation, Continual Service Improvement) and the Introduction to the ITIL Service Lifecycle. The participants will be of two kinds: Authors who will make any necessary changes to the text, and Reviewers who will comment on the changes and advise whether drafts are acceptable.

This work will be referred to in this document as "the project".

Enquiries

1.2   All enquiries about this call for participants should be addressed to The Stationery Office (TSO). Contact details:

Emily Allison
Commissioning Editor
The Stationery Office
St Crispins
Duke Street
Norwich
NR3 1PD
Tel: +44 (0) 1603 69 6669
Email: emily.allison@tso.co.uk

Clarifications

1.3   Please note that responses to any queries received from prospective participants during the selection process may, when it is judged to be appropriate by TSO, be passed on to other contenders for their information, in order to ensure equitable treatment. This will take the form of a clarification to the requirement stated in this document and for anonymity, the original enquirer will not be attributed.

2   Background

About OGC

2.1   OGC is the owner of ITIL. The official core ITIL publications are published by TSO and are Crown Copyright.

2.2   OGC's mission is to work with the public sector as a catalyst to achieve efficiency, value for money in commercial activities and improved success in the delivery of programmes and projects. OGC is committed to ensuring best practice standards are available to the UK public sector and its suppliers. Although the UK public sector is OGC's primary interest, its best practice standards are used by public and private sector organizations all over the world. Organizations adopt these standards to help them deliver their programmes, projects and services efficiently and effectively.

About TSO

2.3   TSO is the largest publisher in the UK by volume, publishing over 9,000 titles a year and providing a comprehensive range of document and publishing services. Privatized from HMSO (now OPSI) in 1996, TSO has a 200-year inheritance of secure, no-fail delivery, firstly as publisher to Her Majesty's Government and Parliament and more recently as publisher for more commercial organizations.

2.4   TSO is managing this update to ITIL as part of its contractual obligation as the Official Publisher of the ITIL best practice guidance from the UK Office of Government Commerce (OGC). TSO also publishes other OGC guidance including PRINCE2™, MSP®, M_o_R® and P3O®.

About ITIL

2.5   ITIL is OGC's best practice framework for IT Service Management. It was developed in the late 1980s by CCTA, which was assimilated into OGC in 2001. The most recent refresh of the ITIL publications began in 2004 and created Version 3, which was published in 2007. This project will create a new edition, an incremental update to Version 3 of ITIL, not a new version.

Objectives of the ITIL update

2.6   The purpose of the update is to address issues within the current Version 3 books that have been raised by the user and training communities through the change control log on **www.best-management-practice.com**. Changes in the update will also be informed by advice from the ITIL Change Advisory Board (CAB) and through other feedback from the user and training communities.

2.7   As part of the project, inconsistencies between the books will be corrected and changes made that reflect valid criticisms of the presentation or content. Additionally, the opportunity will be taken to improve the clarity and accessibility of the Service Strategy book.

2.8   There is no intention to introduce new concepts in this update.

2.9   Authors will work with mentors in the planning and execution of changes to the books. They will also refer to the Change Control Log, to identify any issues that can easily be picked up in the update even if the CAB has not examined all the issues. Any resulting recommendations will be reviewed before they result in changes to ITIL. Reviewers will join a group whose role will be to review progress of product development and then final drafts created by the authors. Reviewers will be required to recommend whether the draft or drafts they examine align

with the product description approved by OGC at the start of the project. If this is not the case, they will additionally advise any necessary changes or actions required to ensure alignment.

Authoring and Mentoring Arrangements

2.10 TSO wish to recruit one author for each of the six books listed in paragraph 1.1 above.

2.11 Each author will work closely with mentors, each of whom is expected to have been involved with the creation of the current version of ITIL (V3). This is to ensure continuity. Mentors will not be assigned on a one-to-one basis with authors and books, because of the need to ensure consistency across the updated titles. At present, the disposition of mentor responsibilities is planned to be as follows:

2.12 Mentor 1: Strategy and Improvement titles: Service Strategy and Continual Service Improvement

Mentor 2: Lifecycle titles: Service Design, Service Transition and Service Operation

Mentor 3: Whole project: This is an overarching role to oversee the project and to ensure consistency throughout the books, and is to include mentoring the Introduction book.

Mentor 4: Technical Continuity Editor: This role is responsible for ensuring that:

- diagrams are correct and consistent with each other and the text and comply with standards where appropriate. The work will require liaison with authors and TSO Graphic Design staff.

- terms are used and defined consistently throughout the books. The work will involve liaison with authors and TSO editorial staff to effect a thorough review of usage of terms and to update the ITIL glossary. Note the glossary is regarded as fundamentally important for effective translations, and it is required that authors abide by the definitions provided by the Technical Continuity Editor, which definitions may be updated in the course of the project. During authoring work, any deficiencies, errors or omissions in the area of definitions will be identified and reported back to the Technical Continuity Editor.

2.13 Whilst the requirement is for authoring services provided by individuals, TSO needs to contract with legal entities, i.e. registered companies or other types of organizations that are able to enter into legal contracts, including sole traders. The contractual commitment will include an undertaking that the proposed individual is available for the duration of the contract.

2.14 Note authors will be expected to submit their work as plain text in Microsoft Word file format. TSO will be responsible for final layout to current OGC presentation standards. To help facilitate this, TSO may provide authors with Word templates.

2.15 Authors will be required to track all the amendments that they make to the text and diagrams.

Reviewing Arrangements

2.16 Reviewers may be asked to comment on ideas, proposals, outlines or partial products. In addition, there will be two formal reviews.

2.17 The first review and the second review will be of the five lifecycle titles. Up to ten reviewers will examine each of the five lifecycle titles at the first review and up to 15 at the second review, these reviewers will focus on one core book. Furthermore, up to fifteen reviewers will look at all five core books specifically from the point of view of consistency between the books at the first draft and up to twenty at the second review. Up to thirty reviewers (from both the first and second draft reviews) will be required to review the Introduction at a later stage through two further review periods.

2.18 The composition of the Review Group is intended to be representative of the ITIL community. It will include:

- small, medium and large Public and Private Sector users
- vendors
- consultants
- training organizations
- International reviewers.

2.19 Reviewers will be required to sign a Non-Disclosure Agreement.

2.20 Reviewers will only be able to view draft materials electronically. No hardcopy will be provided. The electronic drafts provided will not support printing by the reviewer.

2.21 Reviewers will be required to feedback any commentary within an issues log which specifies the criteria against which the publications are being reviewed.

Scope of the Project

2.22 The following are in scope.

- Remedy inconsistencies within the content of the books:
  - Role consistency across the books
  - Ensure that activities apply to only one role
  - Clarify that the organizational structures given as examples are indicative rather than prescriptive
- Restructure the guidance to ensure that all five publications (other than the Introduction book) are organized in the same way

- Ensure that each process has goals, purpose and objectives
- Look at how the processes are dealt with, and ensure a common treatment for all
- Ensure that the books are aligned, where relevant, with guidance in MSP, M_o_R, PRINCE2 and P3O
- Give clear explanations and descriptions of roles and responsibilities
- Standardize the use of glossary definitions within the six titles
- Ensure that the explanations in the text align with those in the glossary
- Update the glossary to take account of the comments made in the Change Control Log
- Examine the definition and usage of the roles of Product Manager and Service Owner
- Ensure that Service Catalogue Manager appears within Service Operation
- Redesign presentation of content according to OGC's updated style guidelines (TSO responsibility).

2.23 The following are **NOT** in scope:

- Introduction of new concepts
- Any changes which would invalidate the current use of ITIL, whether by organizations which have adopted its use or by individuals who have taken an ITIL qualification and are currently using the method in their workplace.

Quality Criteria

2.24 The new edition of ITIL and thus the work by authors as part of the project, is required to meet the following quality criteria. The content must:

- be written in plain English and be free from idioms
- be aligned with OGC PPRM guidance (in particular MSP, M_o_R, PRINCE2 and P3O)
- be free from inconsistencies across all six titles
- benefit from the simplification of all existing concepts where appropriate
- Reviewers will be required to sign a Non-Disclosure Agreement
- meet other project aims listed in the Project Mandate.

Quality Method

2.25 Quality assurance will be carried out by the Review Group. The Review Group will consist of members of the Change Advisory and others recruited through this call for participants or otherwise. This will be managed by TSO. Members of the Change Advisory Board will set the detailed scope for the product/s based on the mandate, agree the full product description/s, and may also provide input to the design of the relevant work package/s if required. The Review Group will monitor progress against product descriptions and advise on the suitability for publication of final drafts — i.e. do they comply with the product descriptions.

Finance

2.26 In exchange for the authoring work, TSO offers a flat fee. The fee is as follows:
Service Strategy: £15,000
All other titles: £10,000

2.27 In exchange for the review work the reviewers will be credited within the relevant publication(s).

3 Requirements from Prospective Authors

Introduction

3.1 You are invited to submit a proposal to TSO covering, in detail, the Requirements set out in this section.

3.2 The categories are:

Service Strategy
Service Design
Service Transition
Service Operation
Continual Service Improvement
The Introduction to the ITIL Service Lifecycle.

3.3 You may bid for one, more or all of the categories.

3.4 You should note that no single individual will be selected to be an author in more than one category. See paragraph 4.3 below.

3.5 Further, no single organization will be awarded an author contract for more than two categories. See paragraph 4.4 below.

3.6 Your proposal must address all the Requirements. A statement that a particular Requirement will be met is not in itself sufficient. Such responses, or responses which are ambiguous, may be taken as failing to meet the Requirement. Detailed information regarding how, when and to what extent a Requirement can be met, must be provided. Furthermore, if any Requirement or part of a Requirement cannot be met, this must be stated explicitly. All of the Requirements except the last must be met in order to qualify for further consideration. A consideration of how well they are met forms the evaluation.

Requirements

3.7   M1

Bidders must indicate which category/categories are being bid for and explain how their work experience is relevant to authoring ITIL content in the relevant categories.

3.8   M2

Bidders must demonstrate their in-depth knowledge of the existing core ITIL guidance.

3.9   M3

Bidders must provide a full CV including major employment periods, qualifications and professional affiliations.

3.10   M4

Bidders must provide evidence of their professional standing in the IT Service Management field, including the geographical regions in which they have operated.

3.11   M5

Bidders must be able to write concise, readable, International English. Evidence of this skill could be provided in the form of previously published material such as articles or books.

3.12   M6

Bidders must confirm they are willing to work within the authoring approach described in this document. Any potential problems with the ability to comply must be indicated.

3.13   M7

Bidders must confirm that they will use the defined ITIL terms appropriately and in accordance with their defined meaning. Defined ITIL terms are those within the ITIL Glossary or, if updated, as advised by the Technical Continuity Editor.

3.14   M8

Bidders must indicate what percentage of their working time could be made available for authoring work during the period November 2009 to end August 2010.

3.15   M9

Bidders must declare any work they are involved with that might be perceived as a conflict of interest with their contribution as authors to the Project.

3.16   M10

Bidders must provide details of the legal entity that would enter into a contract (if the bid is successful). Bidders should note that commissions for the work are non-transferable and except in agreed exceptional circumstances will be terminated should the selected author no longer be available.

3.17   M11

Bidders must confirm they are able to meet the project timetable (see next section)

3.18   D1

It is desirable that bidders have been involved with other IT or Business best practices in the capacity of author, contributor, collaborator or mentor. Any such experience should be described.

4   Procurement and Contractual Requirements for Authors

Procurement Approach

4.1   Following the evaluation of proposals submitted in response to this Call for Participants, TSO will invite one bidder to become an author of one of the updated books. TSO reserves the right to appoint a team of two or more to jointly author a book, if in TSO's judgment that would produce a better outcome.

4.2   The terms and conditions of any contract resulting from this competition will be agreed at the time of making the contract. TSO, as the contracting authority, will maintain uniformity of terms and conditions for all authors working on the project.

4.3   No single individual will be selected to be an author in more than one category because each work package will progress in parallel, which would be an unworkable commitment for the individual.

4.4   No single organization will be awarded a work package for more than two categories. OGC has striven to ensure that ITIL remains Best Practice and requires the project governance structure and the development effort to be widely based across the ITIL community. This is in order to preserve the independence of ITIL from any particular community or commercial viewpoint, and maintain the non-proprietary nature of ITIL. ITIL is a global best practice framework and as such a global distribution of authors will be sought if possible.

Confidentiality and Intellectual Property Rights

4.5   Materials developed by authors during the project may not be passed to third parties. Successful authors will be bound by a non-disclosure agreement.

4.6   Copyright in all material developed by authors will be assigned to the Crown. Authors' moral rights will not be asserted in any resulting publications. The resulting publications will be a team effort. However, authors of work packages will be appropriately acknowledged within the publications.

Procurement Timetable

4.7 Milestones for selection of authors are as follows:

20 November 2009	Closing date for receipt of bids (proposals to author)
26 November 2009	Successful authors notified
11 December 2009	Authors start work
June 2010	Final technical draft
Early 2011	Publication

Please note these dates, other than the closing date for bids, are for guidance and are not firm at this stage.

Contract Duration and Structure

4.8 Contracts will be issued after notification of a successful bid. Authors will not commence work until contracts are signed by both parties. Contracts must be agreed and signed within ten working days of receiving the contract. If this can not be achieved TSO will be forced to seek another author.

4.9 The duration of the contract will be mutually decided at that time.

4.10 No subcontracting will be permitted. The author will commit to be available for the duration of the contract. Only in exceptional circumstances will substitution of an author be agreed by TSO.

4.11 Bidders should note that their stated ability to meet the listed Requirements as well as all other information derived from proposals, will be incorporated as appropriate in any Contract which may result from this procurement.

Procurement Enquiries

4.12 Any enquiries about procurement or contractual issues should be addressed to the contact detailed in paragraph 1.2.

5   Authors responding to this Call for participants

Format of Responses

5.1 Bidders should provide a response to this Call for Participants by submitting a Proposal. The Proposal should adopt the following format:

5.2 Section 1: Management Summary – this must include a clear statement of the identity of the contracting entity, its registered office address and for a company, its registered number.

5.3 Section 2: Introduction - this should be brief, outlining the subject of the Proposal (i.e. which packages are being bid for) and confirming a single contact point for correspondence, queries, etc.

5.4 Section 3: Response to Requirements — the proposal should specify in detail the Bidder's approach to the Requirements. Bidders must address each of the Requirements in Section 3 of this document using, and explicitly referencing, the same paragraph numbering system used in section 3 of this document (i.e. 3.7 et seq.).

5.5 Section 4: Response to the Procurement Requirements — Bidders must confirm that they can meet the Procurement and Contractual Requirements, and timetable.

5.6 Annexes: Any additional company or information brochures etc. should not be included in the main body of the Proposal but should be supplied separately or in annexes. However, please note that providing information in an annex as the sole response to a Requirement is not acceptable and will not be evaluated.

Submission

5.7 Responses should be submitted in Microsoft Word format to the contact given at paragraph 1.2.

5.8 TSO will accept submissions until close of the business day (17:00 PM GMT) on November 20 2009.

6   Requirements from Prospective Reviewers

Review Process

6.1 There will be four formal reviews. The first two will consist of the core set of the five lifecycle books and the second two will consist of the Introduction book. Reviewers may also be asked to comment on ideas, proposals, outlines or partial products.

6.2 The formal review process is fully open and auditable. Each reviewer comment will be tracked with decisions for the refresh team to action. Action on each review comment will be one of:

- acceptance and incorporation into the final publication
- partial acceptance
- rejection with reason

6.3 Reviewers will be required to answer specific questions about the books, as well as providing their own referenced comments. Feedback will be form-based. Full details of the review comment process will be provided to candidates selected to participate.

Non-Disclosure Agreement

6.4 Before becoming reviewers, applicants must enter into a legally binding non-disclosure agreement with the publisher TSO, which prohibits the disclosure of any content or knowledge gained during the QA review to any third party who has not signed the same agreement. Any disclosure which breaches the terms of the non-disclosure agreement may result in legal action.

Which Review?

6.5 Prospective reviewers should indicate which Review they wish to be part of, Reviewers need to specify the name of the core book if they wish to review an individual book or specify that they wish to review all five books from a consistency point of view.

Suitability

6.6 Reviewers must provide a CV including a brief employment history, qualifications and professional affiliations. They must indicate how their experience and expertise demonstrate their in-depth knowledge of the existing core ITIL guidance, and explain how their work experience of ITIL in practice makes them a suitable reviewer. If possible, they should provide evidence of their professional standing in the IT Service Management field.

6.7 It is desirable that Reviewers have been involved with other IT or Business best practices in the capacity of author, contributor, collaborator or mentor. Any such experience should be described.

6.8 Reviewers must confirm they are willing to work within the project approach described in this document. Any potential problems with the ability to comply must be indicated.

Balance In the Review Group

6.9 Reviewers should attempt to represent the views of their community segment rather than provide individual or minority views. The panel will be balanced to reflect the various stakeholder groups within the ITSM community in an attempt to fairly represent the global ITIL community. In their response, prospective reviewers should provide the following information.

Stakeholder Grouping

6.10 Reviewers must indicate the category of ITIL stakeholder they would represent.

Choose from:

1. Public sector customers and internal service providers (including Non-profit)

2. Private sector customers and internal service providers

3. Providers of outsourced or managed services to public and private sectors

4. Consultants, tool vendors, and training providers (serving #1 and #2 above)

Region

6.11 Reviewers must indicate the geographical regions in which they operate.

Choose from:

1. North America (Canada, Mexico, and USA)

2. Central and South America

3. EMEA (Europe, Russia, Middle East and Africa)

4. Asia-Pacific (Including India, China, and Australia)

5. Not for Profit Membership Bodies

Size

6.12 Reviewers must indicate the size of organization in which they predominately work.

Choose from:

1. Small and Medium Enterprises (SME)

2. Large Enterprises (LE)

Use of English

6.13 Reviewers must be able to communicate effectively in International English. Evidence of this skill could be provided in the form of previously published material such as articles or books.

Conflicts of Interest

6.14 Reviewers must declare any work they are involved with that might be perceived as a conflict of interest with their contribution as authors to the Project.

Legal

6.15 Reviewers must provide details of the legal entity that would enter into a contract (if the bid is successful). Reviewers should note that commissions for the work are non-transferable and except in agreed exceptional circumstances will be terminated should the selected author no longer be available. Reviewers should confirm a single contact point for correspondence, queries, etc.

Time Period

6.16 The first two reviews of the five core books are expected to occur around January and April 2010, although project delays may affect these dates. Reviewers are expected to make sufficient time available for review tasks. The reviews of the Introduction are expected to occur in April and June 2010.

6.17 Reviewers must indicate the approximate number of working days they could make available for reviewing work during the period October 2009 to end August 2010.

Enquiries

6.18 Any enquiries should be addressed to the contact detailed in paragraph 1.2.

7 Reviewers responding to this Call for Participants

Format of Responses

7.1 Applicants should provide a response to this Call for Participants by submitting a Proposal. The Proposal should adopt the following format:

7.2 Section 1: Management Summary – this should include:

- which review the applicants wishes to take part in i.e. all core books and Introduction or a specific Lifecycle book. Indicate if no preference. (6.5)
- a clear statement of the identity of the contracting entity, its registered office address and for a company, its registered number. (6.15)
- confirming a single contact point for correspondence, queries, etc. (6.15)

7.4 Section 2: Response to Requirements — the proposal should specify in detail the Bidder's approach to the Requirements listed above, explicitly referencing the paragraph numbering system used in section 6 of this document. This will include:

- statement of willingness to sign an NDA (6.4)
- choosing which stakeholder group they represent from the categories given (6.10)
- indicating of geographical region from the categories given (6.11)
- indicating of organization size from the categories given (6.12)
- declaring any conflicts of interest or confirming that none exists (6.14)
- indicating the time they can commit to this project (6.17)
- CV and arguments for suitability for this work (6.6)
- relevant experience (6.7)
- confirmation of compliance to the approach to the work (6.8)
- evidence of ability to communicate effectively in International English (6.13)

7.5 Annexes: Any additional information supporting the responses to requirements etc. should not be included in the main body of the Proposal but should be supplied separately or in annexes. Please note however, that providing information in an annex as the sole response to a Requirement is not acceptable and all annexes should be referred to in the main body.

Submission

7.6 Responses should be submitted in Microsoft Word format to the contact given at paragraph 1.2.

7.7 TSO will accept submissions until close of the business day (17:00 PM GMT) on November 26, 2009.

Procurement Timetable

7.8 Milestones for selection of reviewers are as follows:

26 November 2009	Closing date for receipt of proposals to review
17 December 2009	Successful reviewers notified

Please note these dates, other than the closing date for bids, are for guidance and are not firm at this stage.

Appendix 1: OGC Trade Marks

- The OGC logo® is a Registered Trade Mark of the Office of Government Commerce in the United Kingdom
- ITIL® is a Registered Trade Mark of the Office of Government Commerce in the United Kingdom and other countries
- IT Infrastructure Library® is a Registered Trade Mark of the Office of Government Commerce in the United Kingdom and other countries
- M_o_R ® is a Registered Trade Mark and a Registered Community Trade Mark of the Office of Government Commerce in the United Kingdom and other countries
- PRINCE2™ is a Trade Mark of the Office of Government Commerce
- P3O™ is a registered Trade Mark of the Office of Government Commerce
- The Swirl logo™ is a Trade Mark of the Office of Government Commerce.