



Challenge-Based Solicitation (CBS) Discoverable and Trusted Data Assets in Support of Decision Making

Bidders' Webinars

June 30th 2020



Shared Services
Canada

Services partagés
Canada

Canada

Objective and Preamble

- The objective of this presentation is to provide complimentary information regarding PW-20-00918709, Challenge-Based Solicitation (CBS) for Discoverable and Trusted Data Assets in Support of Decision Making
- This presentation does not replace or modify any provisions of the CBS mentioned above.
- In case of contradiction between this presentation and the CBS, the terms and conditions of the CBS take precedence.

Structure of this Presentation

Part 1 – Context

Part 2 – Overview of the Initiative

Part 3 – The Selection Process

Part 4 – The Resulting Contract

Part 5 – How to Prepare a Successful Proposal

Part 6 – Invitation to Refine

Part 7 – Questions & Answers

Part 1 - Context



Decision makers face significant impediments in fully leveraging data in decision-making, thereby fuelling continued reliance on tribal knowledge.



SSC data consumers do not know what data is available, where it resides, what it means, who governs it, and whether it can be trusted.

Challenges



- Business vocabulary within SSC is varied resulting in inconsistent representation of data in reporting products
- An inability to identify where authoritative data lie within the department and who governs this data
- Data gaps exist for key business processes and are not being incorporated into authoritative systems resulting in the creation of non-authoritative sources (i.e. black books)

What Are We Buying?

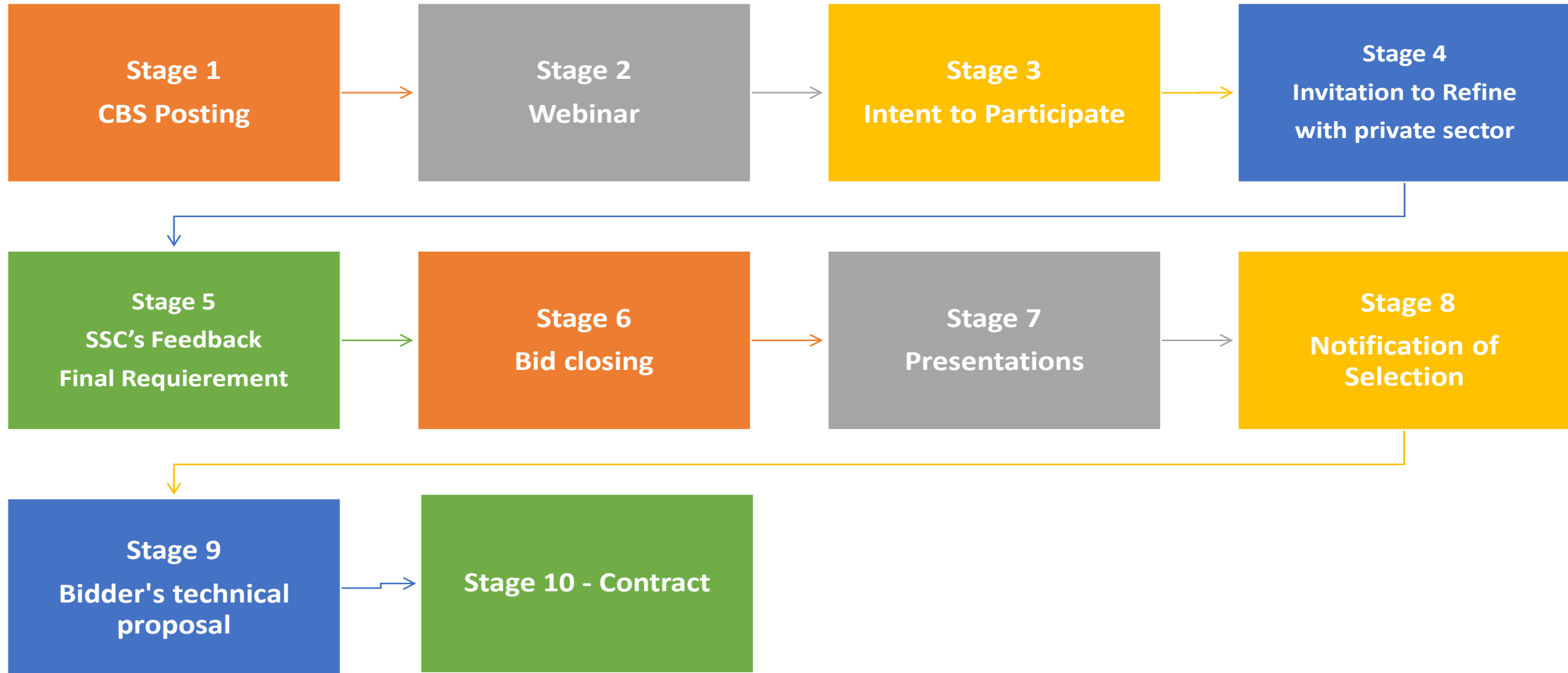
To acquire a **metadata glossary** solution.

Improved service delivery requires sound reporting products. To increase consistency in these products, SSC must standardize business terminology and provide visibility into its data with the help of a metadata glossary.

SSC's 'Integrated Business Glossary':

- Contains key business attributes that exist in the department (i.e. data about our data.)
- Provides visibility into security levels and privacy considerations of SSC's data
- Enables discoverability of SSC's data

Part 2 – Overview of the Initiative



Consultation Process within the CBS



Stage 2 Webinar

Feedback on the proposed procurement process.



Stage 4 – Invitation to Refine

- Feedback on the problem statements, challenges and minimal requirements.
- If the number of Bidders that express intent to participate exceeds 10, Canada reserves the right to use the screening to identify the Bidders who will be invited to refine.



Not mandatory to bid.

Part 3 - The Selection Process

Bid Submission Form and Financial Bid Form	Mandatory financial evaluation criteria	Pass / Fail		Reference 4.1.2
	All "must"	Pass / Fail		Reference 4.2.1
Up to 10 Bidders invited to make a presentation				
Presentations	Part A – Functional Requirements	Rated	Total maximum = 35 points (R1)	Reference 4.2.1
	Part A – Non-functional Requirements	Rated	Total maximum = 25 points (R2)	Reference 4.2.1
	Part B – End-users Expectations	Rated	Total maximum = 10 points (R3)	Reference 4.2.1
	Technical merit = (R1+R2+R3) adjusted to yield a score out of 70			Reference 4.4.3
Financial Proposal (F)	Pricing score		Total Maximum (F) = 30	Reference 4.3
Total Score = Technical merit + Pricing score			Award of up to 2 contracts	

What We're Looking For



Part A – Presentation on Capacity of the Proposed Solution to meet the Functional and Non-Functional requirements

- FR1** - Storing and publishing capacity
- FR2** - Ability to connect
- FR3** - Work Flow
- FR4** - Collaboration
- NFR1** – Role-Based Access
- NFR2** - Solution interface adaptability
- NFR3** - Machine Learning
- NFR4** - Capacity of the Bidder to evolve the Solution
- NFR5** - Capacity of the Bidder to scale up the Solution

Part B – Presentation on Capacity of the Proposed Solution to satisfy the end-users expectation

- R2.1** - Semantic Search functionality
- R2.2** - Easy to Use (Intuitiveness)

Presentation (Stage 7)



May be made via teleconference or videoconference



The bidder's answers to the questions asked by the evaluation team will be used to grade the same presentation evaluation criteria identified in Attachment 6.



Total time allocated is 2 hours by solution presented: Part A – 60 Minutes and Part B – 60 minutes

Time for each presentation will be allocated as follows:

25 minutes to present, 15 minutes for the evaluation team to withdraw prior to the question period, and 20 minutes for questions from the evaluation team.

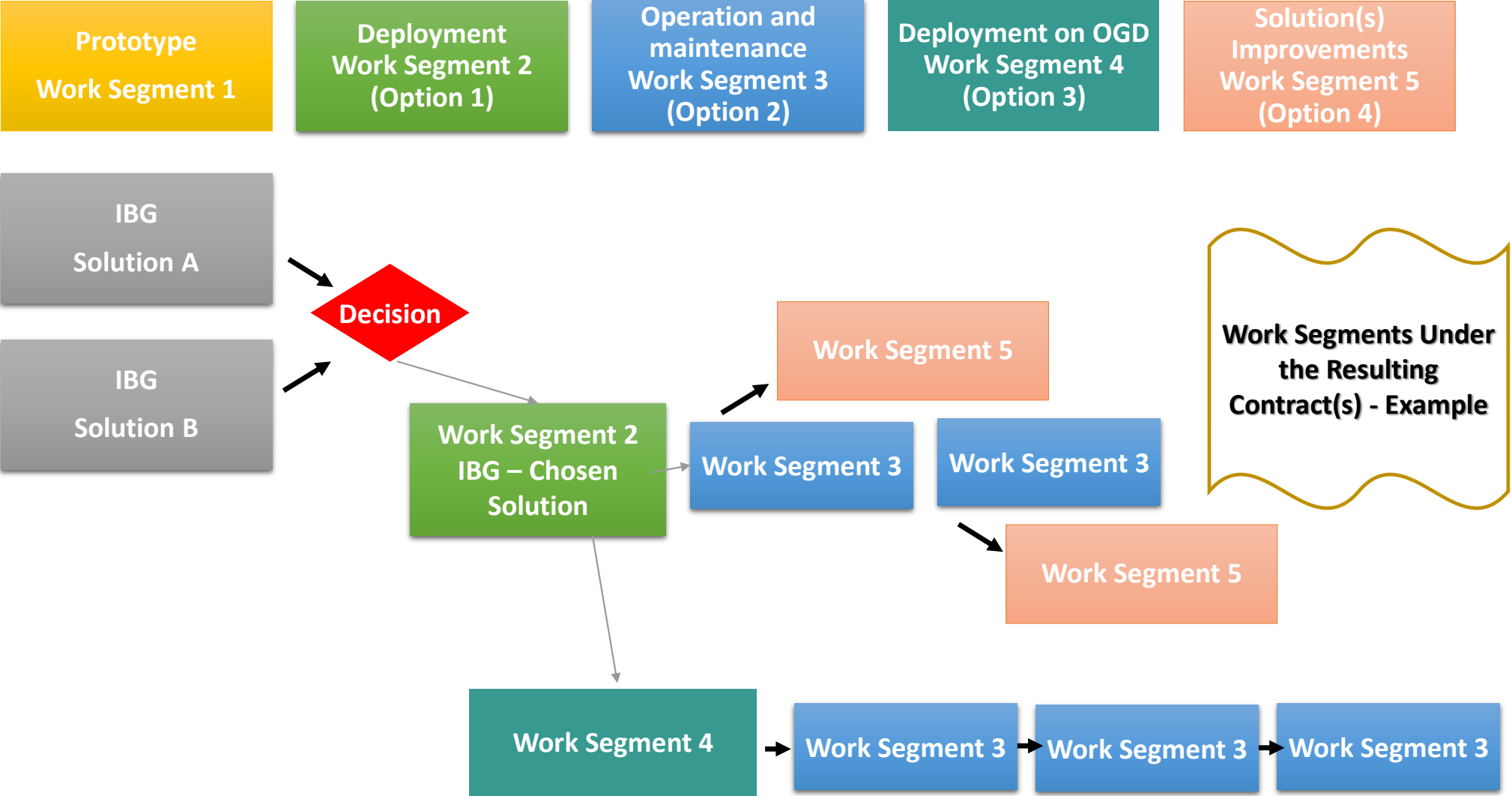


In asking their questions, the evaluation team members will not give any indication to the bidder of how they should respond to the question.

Socio-Economic Measures

One of the contracts will be set-aside for award to an SME.

Resulting Contract



Financial Proposal

Evaluated	Not Evaluated
Firm Price for Prototype + Ceiling Price for Deployment (Option 1) + Ceiling Price for 3 year O&M (Option 2)	Possible deployment to other Government Department (Option 3) Possible Improvement of the solution (Option 4) Adjusted in accordance with CPI index (6.1.7)

***MANDATORY Evaluation Criteria

Decision-Making Framework for Choosing Solution to be Implemented

Installation and setup procedure:

How simple is the solution to install and set up?

Monitoring and operations:

How simple is the solution to monitor and operate?

Overall user experience:

What is the overall user experience during the execution of the various prototype use cases?

Other factors or benefits that would become available or known during prototype

Part 5 – How to Prepare a Successful Proposal

Mandatory Procedural Requirement

Bids not complying with all requirements of the bid solicitation will be declared non-responsive. (4.4.3)

Example

Single Point of Contact:

To ensure the integrity of the competitive procurement process, all formal questions and other communications regarding the solicitation **must** be directed only to the Contracting Authority identified in the solicitation. (2.1)

Use the Provided Forms

Attachment X- Financial Proposal Form



Bidders must complete this Financial Proposal Form. The total amount of Applicable Taxes are excluded.

Bidder Name:

A- Work Segment 1, Prototype

Table 1 - Milestone Payments

Description	Firm, all-inclusive Price
Milestone 1: Solution Prototype Delivery	
Milestone 2: Prototype Installation Guide	
Milestone 3: Prototype Support Documentation	
Milestone 4: Support Memo	
Total Firm Price milestones for Work Segment 1- Prototype (Max \$25,000)	\$ -

B- Work Segment 2, Deployment

Table 2 - Logiciel sous licence and one year of Maintenance and Support

Description	Unit of Measure	Firm, all-inclusive Price
Entity Licensed Software for unlimited number of users with one year of maintenance and support services	Perpetual Entity Wide License	
Total Licensed Software and one year of Maintenance and Support		\$ -

Invitation to Refine

Ultimate Objective:

Interact with the private sector to refine the technical requirement and the procurement process.

Sub-objectives

Part A – Requirements: Obtain feedback on proposed solicitation components.

Part B – Virtual Presentations: Get a better understanding of what is available on the market

Expected benefits from:

Part A – Requirements: Solicitation requirement definition better aligned with market reality

Part B – Virtual Presentations:

- SSC better understands the solutions on the market
- End-users better understand the user centricity of solutions available on the market
- Open space for vendors to potentially create optimal partnerships.

Expectations Toward Vendors that Agree to Participate to the Invitation to Refine (ItR)

Complete questionnaires

Complete ItR-related questionnaires prior to the date indicated in the Request of Input Package (RoIP).

Presentation

Deliver a virtual presentation.

Participation

Interactive participation during the ItR session.

Feedback

When requested by the Contracting Authority, provide feedback at the end of the procurement process.

Part A – Requirements

Key Steps:

Step 1 : Slido Survey: Registered Bidders will receive a Request of Input package with a link to a slido survey.

Step 2 : Bidders complete the survey by the date identified in the package.

Step 3 : Open discussion with all Bidders based on survey results

Survey Components:

1. Problem Statements and Challenges
2. Functional and Non-Functional Requirements
3. Statement of Challenge Work Segments
4. Evaluation Criteria
5. Pricing Basis

Part B – Presentation – Not Scored

Key Steps:

Step 1 : Presentations

- How could the solution help resolve the problem?
- How is the solution user-centric?

Step 2 : Interactions between vendors and end-users

Q&A sessions between SSC technical experts, end-users, and vendors

Options

Option A - Vendors given 20 minutes to deliver virtual presentations on MS Teams which are accessible to all Vendors and are recorded. Q&A following each session.

Option B - Vendors to record their presentations which will be made available to all on Buy and Sell.

Part 7 – Questions & Answers



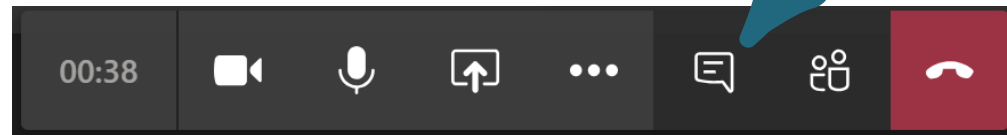
The following key principles govern the preparation of responses to questions received in the context of a CBS:

- Often the answers are in the solicitation document. Whenever possible, the answer will refer to a provision of the CBS.
- We do not provide interpretation of the clauses. That being said, if an ambiguity remains, we note it and we clarify by way of formal amendment.
- We avoid giving answers to hypothetical situations or special cases. This task is delegated to the evaluators once the CBS is closed.

Question About the Procurement Process?



Please use the chat in MS Team...



Webinar Questions in Relation to the Consultation vs Part A – Requirements



slido

<https://app.sli.do/event/ousztkwq>



ItR – Example of Slido Questionnaire

Functional and Non-Functional Requirements

- **Clarity** (1 to 5): How clear is your understanding of the expected performance? (Scale 1-5; 1 = not clear at all, 5 = very clear)
- **Appropriateness** (1 to 5): How appropriate are the requirements for resolving the identified problems and challenges? (Scale 1-5; 1 = Not appropriate at all, 5 = very appropriate)
- Suggestions?

Evaluation Criteria

- **Clarity** (1 to 5): How clear is your understanding of what you must demonstrate to get the points? (Scale 1-5; 1 = not clear at all, 5 = very clear)
- **Transparency** (1 to 5): How transparent is the information on how your bid will be translated into points? (Scale 1-5; 1 = Not transparent at all, 5 = very transparent)
- Suggestions?

Give your rating

