



**SHARED SERVICES CANADA**  
**Challenge-Based Standing Offer Solicitation - Initial**  
 For  
**Robotic Process Automation - Solution**

|                  |                       |      |                |
|------------------|-----------------------|------|----------------|
| Solicitation No. | 2BS-1-91027 - Initial | Date | August 3, 2021 |
| Amendment No.    | 004                   |      |                |

|  |  |  |  |
|--|--|--|--|
| Issuing Office   | Shared Services Canada<br>180 Kent Street, 13 <sup>th</sup> Floor<br>Ottawa, Ontario K1P 0B5 |  |  |
| Standing Offer Authority<br><br>(The Standing Offer Authority is the person designated by that title in the Solicitation, or by notice to the Offeror, to act as Canada's "Point of Contact" for all aspects of the Solicitation process.) | <b>Title</b>   | <b>Meghan MacKenzie</b>  |  |
|  | <b>Telephone No.</b>   | <b>343-571-3953</b>  |  |
|  | Email Address  | <a href="mailto:Coeaip-ceaan@ssc-spc.gc.ca">Coeaip-ceaan@ssc-spc.gc.ca</a> |  |
| Closing Date and Time<br>Pre-Qualification   | <b>August 10, 2021 at 15:00</b>  |  |  |
| Solicitation Closing   | <b>October 29, 2021 at 15:00</b>   |  |  |
| Email Address for Submitting Offers  | <a href="mailto:Coeaip-ceaan@ssc-spc.gc.ca">Coeaip-ceaan@ssc-spc.gc.ca</a>                   |  |  |
| Time Zone  | EDT  |  |  |
| Destination of Goods/Services  | See Herein   |  |  |
| Vendor/Firm Name and Address   | Telephone No.:   |  |  |
| Name and title of person authorized to sign on behalf of Vendor/Firm (type or print)   | Name/Title   |  |  |
|  | Signature  | Date   |  |



**Amendment No. 004 is raised for the following reasons:**

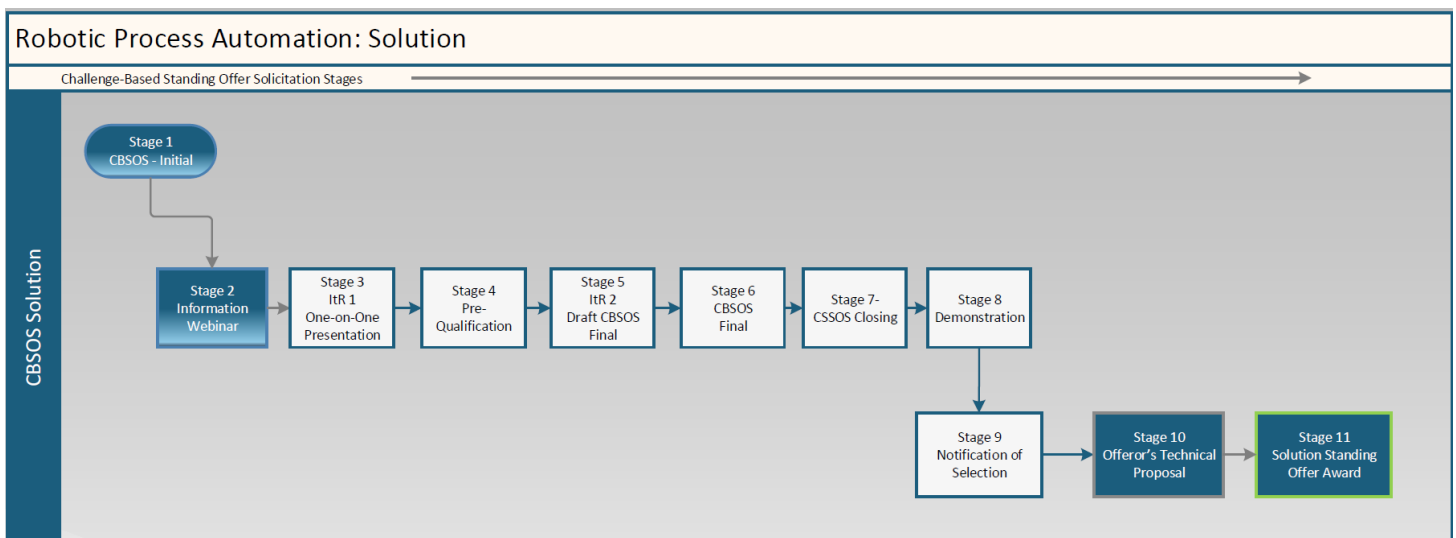
- Post the details of the Pre-Qualification Period
- Refine language around Stage 4 for clarity.

**Note the following information will be posted to buy and sell at a later date.**

- The responses to questions sent to the [coeaip-ceaan@ssc-spc.gc.ca](mailto:coeaip-ceaan@ssc-spc.gc.ca) inbox.

**AT CLAUSE A1.3, DELETE IN ITS ENTIRETY AND REPLACE WITH:**

**A.1.3 Challenge-Based Standing Offer Solicitation Stages - Infographic**



**Stage 1: Challenge-Based Standing Offer Solicitation - Initial**

The Notice of Proposed Procurement (NPP) and Challenge-Based Standing Offer Solicitation - Initial is published on Buyandsell.gc.ca.

**Stage 2: Information Webinar**

Offerors are invited to attend an Information Webinar. During the Information Webinar, Canada will provide an overview of the approach, explain the Invitation to Refine (ITR) “waves”, and gather feedback from industry on the proposed Solicitation process and evaluation framework.

**Stage 3: Invitation to Refine (Wave 1)**

During RPA Solution - Invitation to Refine (Wave 1) Offerors are invited to provide feedback on the problem statement(s) and share their perspectives by participating in various interactive events (videoconferences, group interactions, surveys and Offeror presentations) facilitated by



Canada (in the presence of all Offerors or “one-on-one”). Offeror’s feedback and presentations will not be scored nor considered in the Solicitation evaluation process, ItR questions and answers will be documented. The purpose of the ItR (Wave 1) is to help Canada finalize the Challenge-Based Standing Offer Solicitation. At Canada’s discretion, additional ItRs events (in the presence of all Offerors or “one-on-one”) may be scheduled for the same purpose as outlined above.

#### Stage 4: Pre-Qualification

Based upon the findings from ItR - Wave 1, Canada may invite Offerors to qualify for either further Pre-Qualification stages or on the final Challenge Based Standing Offer. The objective of the Pre-Qualification stage is to establish a qualified pool of Offerors who understand the problem statement(s) and could provide innovative Solutions. Canada will choose the most qualified Offerors for pool formation, in accordance with Clause A.4.2 and Annex A, Pre-Qualification Technical Evaluation Criteria.

(Note to Offerors: Stages 5 through 10 will be limited to Offerors that have been selected to form the pool of qualified Offerors).

#### Stage 5: Invitation to Refine (Wave 2)

During RPA Solution - Invitation to Refine (Wave 2) Offerors are invited to provide additional feedback on the problem statement(s) and share their perspectives by participating in additional interactive events facilitated by Canada (in the presence of all Offerors or “one-on-one”). Offeror’s feedback and presentations will not be scored nor considered in the Solicitation evaluation process, ItR questions and answers will be documented. The purpose of the ItR Wave 2 is to help Canada finalize the CBSOS.

(Note to Offerors: Provided Canada chooses to qualify Offerors (Stage 4), the Invitation to Refine (Wave 2) will be limited to Offerors that have been selected to form the pool of qualified Offerors).

#### Stage 6: Challenge-Based Standing Offer Solicitation - Final

At Stage 6, based on observations during the ItR session(s), Canada will refine and issue the Final Challenge-Based Standing Offer Solicitation, beginning Component 2 of the Solicitation process. ItR participants will be invited to feedback sessions, designed to contribute to the improvement of the Agile Procurement process (PP3.0) framework.

#### Stage 7: Solicitation Closing - Offer (Bid) Submission Form and Financial Offer Form

Offerors submit an Offer using Annex [X] - Offer Submission Form and Attachment [X] - Financial Offer Form. Unlike traditional procurement, Offerors are not required to provide a comprehensive written technical Offer at Offer Closing. Refer to the clause entitled *Submission of Written Documents by Offerors*, of Section 3 - Offer Preparation Instructions, for information on the submission of written documents by Offerors.

#### Stage 8: Demonstration

Offerors that are compliant with the mandatory procedural requirements and the Mandatory Financial Evaluation Criteria described herein, are requested to make a demonstration.

#### Stage 9: Notification of Selection



The highest ranked Offerors following the Evaluation Procedures and Basis of Selection process (Section A4 of the CBSOS), are notified (Notification of Selection) of Canada's intent to award Standing Offers.

#### Stage 10: Technical Offer

Offerors notified of selection at Stage 9 of Canada's intent to award Standing Offers are requested to submit their Technical Offer. (Note to Offerors: Offeror's Technical Offers are not to be provided at Offer Closing, i.e., Stage 7.)

#### Stage 11: Standing Offer Award - WS 1 Call-ups (Proof of Concept)

Canada anticipates awarding multiple RPA Solution Standing Offers. At Standing Offer award, the Standing Offer Authority may issue a Call-Up Instrument for WS 1 - Proof of Concept to the Offerors holding a Standing Offer (Offer Holders), to develop, test, and evaluate selected Solutions in parallel. The Proof-of-Concept development, testing, and evaluation phase has an expected duration of 2 or 3 months, and a maximum Total Estimated Cost of \$25,000., exclusive of Applicable Taxes.

### **AT CLAUSE A.2.4 Enquiries - Solicitation, DELETE IN ITS ENTIRETY AND REPLACE WITH:**

#### **A.2.4 Enquiries - Solicitation**

Questions and comments about this Solicitation can be submitted in accordance with SACC 2006 (2020-05-28) Standard Instructions - Request for Standing Offers - Goods or Services – Competitive Requirements, section 13 *Communication – solicitation period*, there will be two (2) question periods, as follows.

Question Period 1 (Wave 1 and 2): All enquiries are requested to be submitted in writing to the Point of Contact no later than three (3) calendar days before the Information Webinar, and no later than three (3) calendar days before each Invitation to Refine event. Enquiries received that do not meet this condition may not be answered during the Information Webinar or during the Invitation to Refine event.

Question Period 2 (Pre-Qualification): All enquiries are requested to be submitted in writing to the Point of Contact no later than five (5) calendar days before the Closing Date and Time of the Pre-Qualification. Enquiries received that do not meet this condition may not be answered before the Closing Date and Time of the Pre- Qualification. Enquiries received after that time will not be answered.

Offerors should reference as accurately as possible the numbered item of the Solicitation to which the enquiry relates. Care should be taken by Offerors to explain each question in sufficient detail to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature are requested to be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that of the Offerors, so the proprietary nature of the question(s) is eliminated, and the enquiry can be answered to all Offerors. Enquiries not submitted in a form that can be distributed to all Offerors may not be answered by Canada.



**AT SECTION A.3, INSERT:**

**SECTION 3 - OFFER PREPARATION INSTRUCTIONS**

**A.3.1 Submission of Written Documents by Offerors**

Offerors are required to submit written documents at the following stages.

1. Stage 4: Pre-Qualification
2. Stage 7: Offer Closing - Offer Submission Form and Financial Offer Form
3. Stage 10: Technical Offer

**A.3.1.1 Stage 4: Pre-Qualification**

Offerors must submit their completed Annex A - Pre-Qualification: Technical Evaluation Criteria Form by the Closing Date and Time noted on cover page of the Challenge-Based Solicitation.

**A.3.1.2 Eligibility - Pre-Qualified Offerors**

Offerors that are qualified at Stage 4 - Pre-Qualification, and who remain qualified on the Offer Closing Date and Time are eligible to submit an Offer. Pre-qualified Offerors may partner with entities that were not pre-qualified at Stage 4. Canada reserves the right to re-evaluate any aspect of the qualification of any Offeror at any time during the Solicitation process.

**3.1.3 Electronic Submission for Pre-Qualification**

All Offerors must submit their Annex A - Pre-Qualification: Technical Evaluation Criteria Form by email by the Pre-Qualification Closing Date to the email address identified on the cover page of the Solicitation as the "Email Address for Submitting Offers".

**Electronic submission of Offers is mandatory.**

- a) **Submission through Email:** All Offerors must submit their Offers through email address, as specified in this section.
- b) **Submissions not permitted after Pre-Qualification Closing:** After Pre-Qualification Closing, only emails that are received at the Email Address for Submitting Pre-Qualification Technical Evaluation Forms by Pre-Qualification Closing will be considered.
- c) **Format of Pre-Qualification Documents/Email Attachments:** Offerors may submit Pre-Qualification Technical Evaluation Forms in any of the following approved formats:
  - i) PDF attachments; and
  - ii) documents that can be opened with either Microsoft Word or Microsoft Excel.

Offerors that submit Pre-Qualification Technical Evaluation Forms in other formats do so at their own risk, as Canada may be unable to read them.



- d) **Email Size:** Offerors should ensure that they submit their Pre-Qualification Technical Evaluation Forms in multiple emails if any single email, including attachments, will exceed 10 MB.
- e) **Email Title:** Offerors are requested to include the Solicitation number identified on the cover page of Solicitation in the “subject” line of each email forming part of the ir Offer.
- f) **Email Title Multiple Emails:** Offerors that submit their Pre-Qualification Technical Evaluation Forms in multiple emails, are requested to indicate the number of the email and the total number of emails that encompass the Offerors total Pre-Qualification Technical Evaluation Forms in the “subject” line of each email forming part of their submission (example emails 1 of 5).
- g) **Time of Receipt:** All emails received at the Email Address for Submitting Pre-Qualification Technical Evaluation Forms showing a “received” time before Pre-Qualification Closing will be considered timely. In the case of a dispute regarding the time at which an email arrived at SSC, and the time at which the Pre-Qualification Technical Evaluation Forms is received by SSC will be determined:
- i) by the delivery time stamp received by the Offeror if the Offeror has turned on Delivery Status Notification for the sent email in accordance with RFC 1891 established by the Internet Engineering Steering Group (SMTP Service Extension for Delivery Status Notification); or
  - ii) if the Offeror has not turned-on Delivery Status Notification for the sent email, in accordance with the date and time stamp on the SMTP headers showing the time of first arrival on a server used to provide the Government of Canada with email services.
- h) **Availability of PoC:** During the 4 hours leading up to Pre-Qualification Closing, an SSC representative will monitor the Email Address for Submitting Pre-Qualification Technical Evaluation Forms and will be available by telephone at the PoC’s telephone number shown on the cover page of the solicitation (although the SSC representative may not be the PoC). If the Offeror is experiencing difficulties transmitting the email to the Email Address for Submitting Pre-Qualification Technical Evaluation Forms, the Offeror should contact SSC immediately at the PoC’s coordinates provided on the cover page of the Solicitation.
- i) **Email Acknowledgement of Receipt by SSC:** On the day of Pre-Qualification closing, an SSC representative will send an email acknowledging receipt of each Pre-Qualification Technical Evaluation Form(s) (and each email forming part of that submission, if multiple emails are received) that was received by Pre-Qualification Closing at SSC’s Email Address for Submitting the Pre-Qualification Technical Evaluation Forms.
- j) **Delayed Email Pre-Qualification Technical Evaluation Forms:** SSC will accept an email submission received in the first 24 hours after Pre-Qualification Closing only if the Offeror can demonstrate that any delay in delivering the email to the SSC Email Address for Submitting Pre-Qualification Technical Evaluation Forms is due to Canada’s systems. Submissions received by



email more than 24 hours after Pre-Qualification closing will not be accepted under any circumstances. As a result, Offerors who have tried to submit a Pre-Qualification Technical Evaluation Form but have not received an email acknowledging receipt from SSC should contact the PoC so that they can determine whether or not the submission arrived at the SSC Email Address for Submitting Pre-Qualification Technical Evaluation Forms on time.

k) **Responsibility for Technical Problems:** By submitting Pre-Qualification Technical Evaluation Forms, the Offeror is confirming it agrees that Canada is not responsible for:

i) any technical problems experienced by the Offeror in submitting its Pre-Qualification Technical Evaluation Forms, including emails that fail to arrive because they exceed the maximum email size of 10 MB or including email or attachments that are rejected or quarantined because they contain malware or other code that is screened out by SSC for security reasons

#### **AT SECTION A.4, INSERT**

#### **SECTION 4 – EVALUATION PROCEDURES AND BASIS OF SELECTION**

Offers and Pre-Qualification submissions will be assessed in accordance with the requirements of the Solicitation and the technical and financial evaluation criteria as applicable.

There are several steps in the evaluation process, which are described herein. Even though the evaluation and selection will be conducted in steps, the fact that Canada has proceeded to a later step does not mean that Canada has conclusively determined that the Offeror has successfully passed all the previous steps. Canada may conduct steps of the evaluation in parallel.

An evaluation team composed of representatives of Canada will evaluate the Offers. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.

##### **A.4.1 Evaluation Procedures - Pre-Qualification**

The information submitted in Annex A - Pre-Qualification: Technical Evaluation Criteria Form will be evaluated according to clause A.4.2. Offerors must submit their completed Pre-Qualification: Technical Evaluation Criteria Form by the Closing Date and Time noted on cover page of the Challenge-Based Solicitation.

##### **A.4.2 Basis of Qualification – Pre-Qualification**

To be declared a qualified Offeror, an Offer must:

- a) comply with all the requirements of the Challenge-Based Standing Offer Solicitation - Initial.
- b) meet all the mandatory criteria at Annex A, Pre-Qualification Technical Evaluation Criteria; and
- c) achieve a minimum score of 60% on the point-rated criteria at Annex A, Pre-Qualification Technical Evaluation Criteria.



Offers not meeting a), b) or c) will be excluded from further participation in the Solicitation process.

Offers that fail to meet the mandatory criteria will not be evaluated against the point-rated criteria.

In accordance this clause, Canada will choose qualified Offerors for pool formation. Offerors selected to form the pool will move on to the next stage of the Solicitation process and Canada will notify Offerors not selected of their exclusion from further participation in the Solicitation process.

**AFTER ATTACHMENT 4 – ACCESSIBILITY ACT, INSERT: ANNEX A - PRE-QUALIFICATION: TECHNICAL EVALUATION CRITERIA FORM**

## **Annex A**

### **Pre-Qualification Technical Evaluation Form (provided as a separate document or attachment)**

**ALL OTHER TERMS AND CONDITIONS REMAIN THE SAME**