Challenge-Based Solicitation (CBS)
Robotic Process Automation (RPA) – Professional Services
Solicitation No.: 2BS-1-91027/C
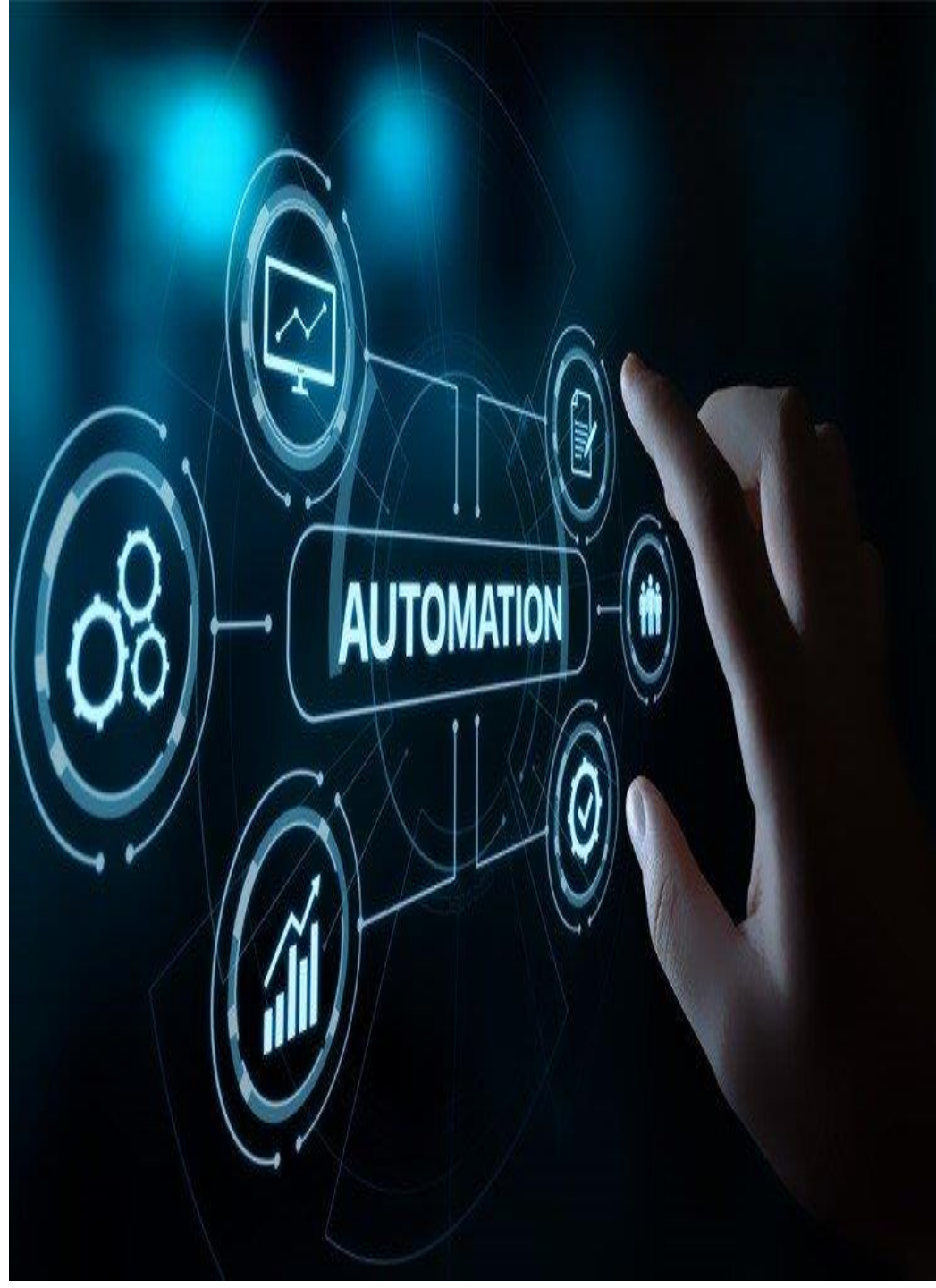
Webinar

Jan 11, 2022

RPA

Objective and Preamble

- The objective of this presentation is to provide complementary information regarding Challenge-Based Solicitation (CBS) No 2BS-1-91027/C

- 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.

Where are we at?

- SSCs RPA requirement originated under Solicitation 2BS-1-91027

- Based on industry feedback the Professional Services were removed and a new solicitation was created exclusively for RPA Professional Services (2BS-1-91027/B)

- While focusing on the RPA Software Solicitation, 2BS-1-91027/B was let to expire.

- SSC has restarted the RPA Professional Services under 2BS-1-91027/C

- Feedback from past interactions will be built upon and

- Feedback from new and existing Vendors is welcome and appreciated.

Where are we at? Continued

- RPA Solution Environment (2BS-1-91027)

- 3 of 4 Pre-Qualified Softwares have completed Proof of Concept

  - A360, Blue Prism, UiPath

- 3 Standing Offers Awarded and Active to Software Resellers

  - All 3 SOs are currently to resell Blue Prism

  - 8 other resellers eligible for award, pending security, certifications and bid compliance.

- Intake of new Resellers anticipated summer 2022

- Opening and Refresh of SO to new Solutions as needed and at SSCs discretion.

Structure of this Presentation

01   Context

02   Problem Statement and Challenges

03   Personas

04   Overview of the Initiative

05   Transparency and Fairness Platform

06   Invitation to Refine

07   Questions and Response

Part 1 - Context

Many public servants have not yet been exposed to RPA. In concurrence with new investments in RPA Solutions, Canada needs business consulting, change management and IT project management expertise, on an as-and-when required basis, to support the business case, buy-in, design, development, implementation and management of robotic process automation.

Canada would like to qualify RPA solutions to scale up the use of automation across Departments, from administrative tasks to complex processes. Canada is seeking to qualify vendors with RPA solutions that offer the degree of flexibility and scalability required to meet Departments where they are at in their respective automation journey.

Types of professional services

Canada lacks resource capacity with experience in Robotic Process Automation (RPA) to automate administrative and other tasks.

The key elements of a RPA system include:

- **RPA Assessments** (Maturity, Opportunity, Process Improvement)
- **RPA Solution Selection (PoC)**
- **RPA Solution Readiness and Deployment**
- **RPA Development and Delivery**
- **RPA Operations**
- **RPA/IA Centre of Excellence (IACoE)**
- **Quality Assurance (QA)**
- **Improvement to Professional Services**
- **Resourcing Callup**

Challenges (Cont')

Challenge(s) specific to the Professional Services Solution and Expectations
(refer to the CBS, Annex A, Attachment 1- Statement of Challenges)

Advise and Guidance:
- Rapidly evolving technology requires specialized rapidly

- Outdated and inflexible systems

- Great deal of Multiple data sources that we need to extract data from

- Lack of understanding of the end-to-end process and articulating the benefits of paper-based pro its automation

Training/Knowledge Transfer
- Lack of knowledge and experience to identify applicability of RPA opportunities and solutions

Change Management (Culture)
- Buy-in and adoption of process automation and RPA at all levels of the departments, from management to end-users

Capacity Augmentation
- Inability to reassign our resource to value-added tasks as they are consumed with repetitive tasks

- Resource and capacity shortage to build internal expertise

- Lack of capacity for maintenance, updates and ongoing support of implemented RPA Solutions

- Knowledge and experience gap of workforce

- The cyclical peaks in demand for services from Canadians

- The many convoluted policies and procedures that the RPA needs to work with

Part 3 – Personas (Goals and Challenges)

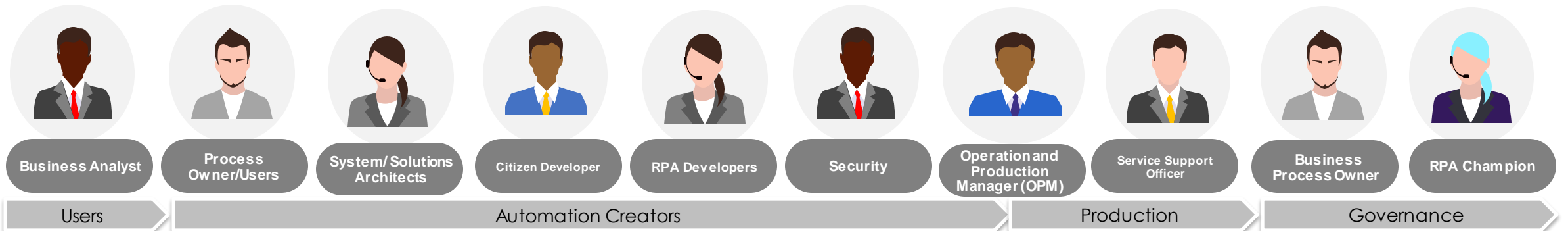**Persona:** Hiring PS Manager

Goals

- Trying to get people in quickly.
- Finding the right people: most qualified, best fit for the problem space we are working in.
- Be able to augment our core team of employees.
- Address a struggle of not having a skill set from our current pools.
- Whoever you bring in will help augment our internal teams and offer knowledge and experience transfer.
- In some cases, we are sourcing a new capability that currently doesn't exist.
- Knowledge transfer is expected.
- Reach into a bench depth and specific knowledge and skills.
- To be specific on the outcomes we are seeking to achieve and ability to benefit from fixed price for an outcome.
- To build up a capability offering.

Challenges

- Battles for top talent and pools are limited. Everyone is on an RPA journey of some kind and so competing for resources between departments.
- Non-technical individuals hiring technical resources.
- Qualifying the right skills when not technical.
- Finding people with clearances or expediting clearances with a demonstrated pressing need.

Values

- Company bench depth to the position.
- Capacity (#s) vs capability (skillset).

Business Analyst	Process Owner/Users	System/Solutions Architects	Citizen Developer	RPA Developers	Security	Operation and Production Manager (OPM)	Service Support Officer	Business Process Owner	RPA Champion

Users	Automation Creators	Production	Governance

Part 4 – Overview of the Initiative

What are we Buying?

We plan to cover two primary areas:

Professional Services that are specialized in RPA automation technology **(Solicitation 2BS-1-91027/C)**
RPA automation software (licensing, maintenance, support) (Solicitation 2BS-1-91027)**

In the RPA ecosystem there will be two types of professional services:
1) Focused on specific outcomes
2) other will be for resource augmentation

Provisions:
- Incentives will be introduced as part of the ItR for **Aboriginal and SMB organizations** inclusion.
- Survey(s) will be introduced as part of the **CBS for Official Language and Accessibility**. This will assist in developing a strategy to work with solution providers to meet GC requirements.

Who will use RPA? This standing-offer is for use by all GC departments, Agencies and Crown Corporation, and Provincial, Territorial and Municipal government entities.

Proposed Procurement Process
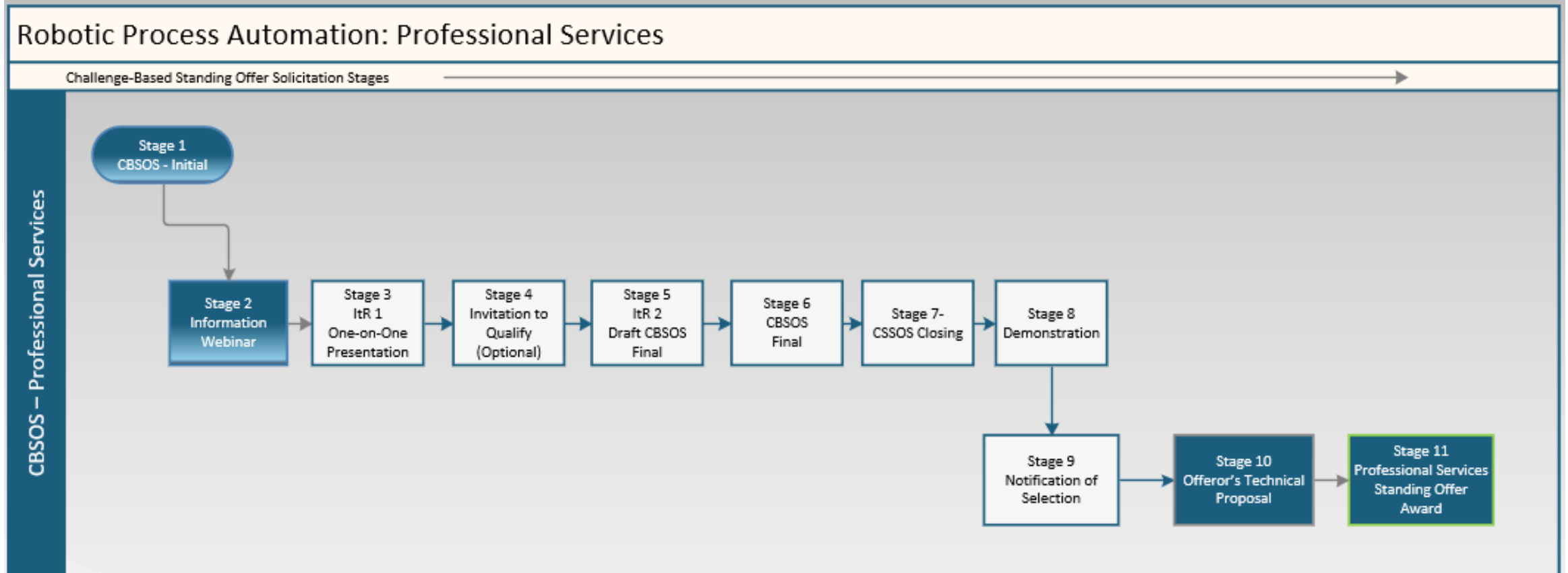
Part 5 – Transparency and Fairness Platform

True Collaboration Process

- TECHNATION
- Consultation process for refining requirements and the procurement process
- Frequent "What we Heard" reports

Debriefing Process

Internal Recourse Mechanism

Equal Access to Decision Makers

- Official information that is binding upon Canada will only be made available by the Point of Contact (PoC).

How Does TECHNATION Support SSC?

TECHNATIONCA

TECHNATION, Canada's national ICT business association, implemented an open business intelligence platform called the TECH2GOV* Digital Marketplace open to all Canadian technology companies.

Community Outreach

They act as a communication catalyst, with the help of 14 community outreach partners across Canada (and growing), while mobilizing the vendor community through their Digital Marketplace to participate in SSC Agile procurements.

Opportunities for SMEs

By helping SSC reach out to Small and Medium-sized Enterprises (SME) in order to pilot the Window of Opportunity for Underrepresented Groups (URG) including SMEs, a new concept that focuses on improving access to government procurement dollars for the aforementioned groups.

Continuous Improvements

Continuously collecting input from its members on the mechanisms being tested by SSC and provides this feedback to SSC to enable timely adjustments.

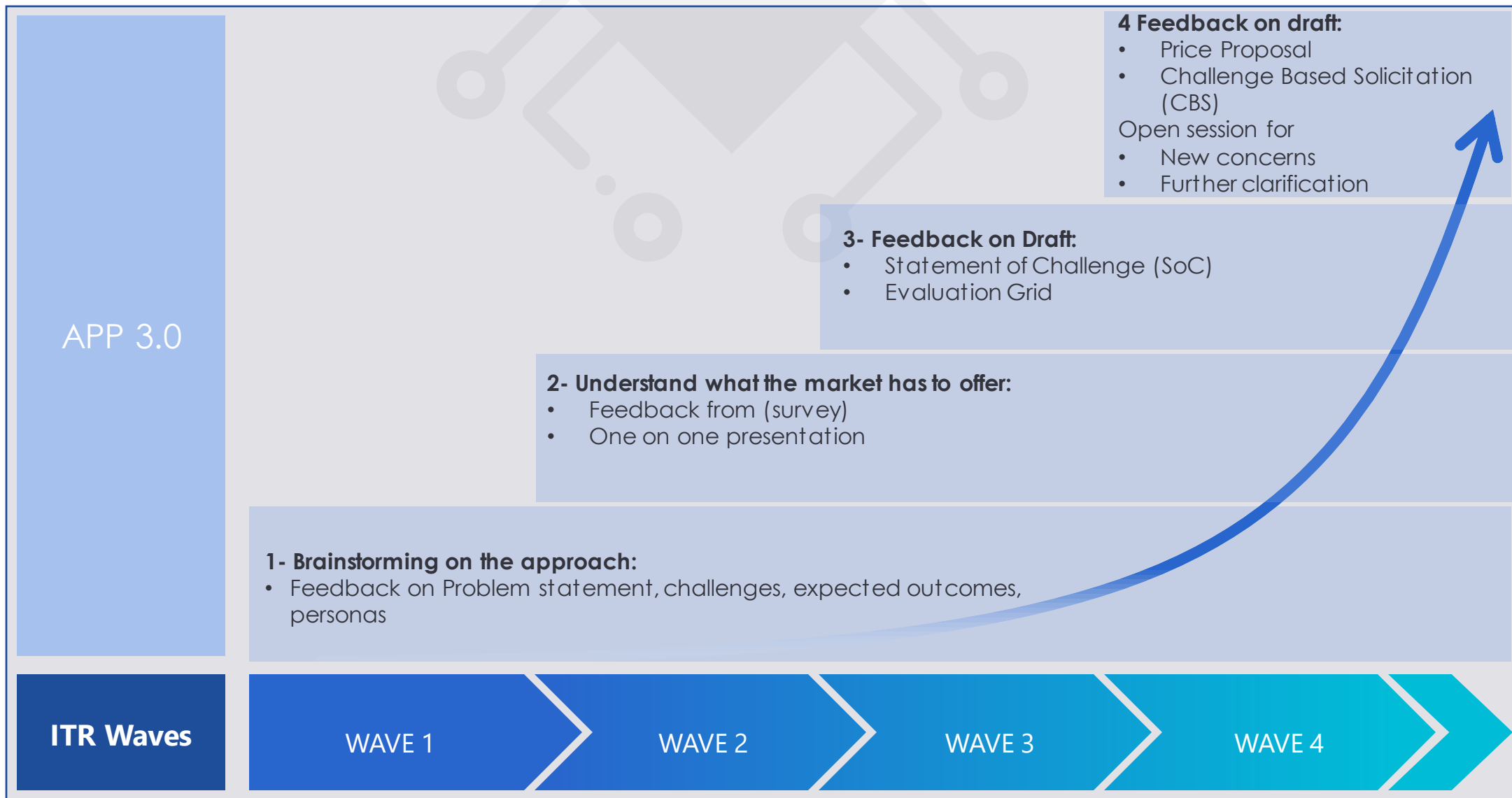# What is flexible under an Agile Procurement process?

The following elements could be adjusted:

➢ Components of the procurement process (pre-qualification or not, stages of evaluation, etc.)

➢ Evaluation Criteria

➢ Components of the Statement of Challenge

➢ Structure of the Price Proposal

➢ Components of the Invitation to Refine

➢ Durations and Dates

The following element are fixed:

➢ SACC 2003 Standard Instructions - Goods or Services - Competitive Requirements

➢ After bid closing, the Terms and Conditions of the resulting Contract are not negotiable.

Part 6 – Invitation to Refine (ITR) Waves

APP 3.0

ITR Waves

4 Feedback on draft:
- Price Proposal
- Challenge Based Solicitation (CBS)

Open session for
- New concerns
- Further clarification

3- Feedback on Draft:
- Statement of Challenge (SoC)
- Evaluation Grid

2- Understand what the market has to offer:
- Feedback from (survey)
- One on one presentation

1- Brainstorming on the approach:
- Feedback on Problem statement, challenges, expected outcomes, personas

WAVE 1 WAVE 2 WAVE 3 WAVE 4

Expectations of Bidders that Agree to Participate in the Invitation to Refine Waves

Complete questionnaires

Complete ItR related questionnaires

Presentation

Deliver a virtual presentation (as required).

Participation

Interactive participation during the ItR sessions.

Feedback

When requested by the Point of Contact, provide feedback at the end of the procurement process.

Part 6 – Invitation to Refine (ITR)

You could help resolving the problem?

Register to the Invitation to Refine

Please send an email to Meghan MacKenzie

coeaip-ceaan@ssc-spc.gc.ca

Challenge-Based Standing Offer Solicitation

Part A - Robotic Process Automation Solution (Sections)
- Section A1   General Information; provides a general description of the requirement.
- Section A2   Instructions to Offerors; provides the instructions, clauses, and conditions applicable to the Challenge-Based Standing Offer Solicitation.
- Section A3   Offer Preparation Instructions; provides Offerors with instructions on how to prepare their Offers.
- Section A4   Evaluation Procedures and Basis of Selection; describes how the evaluation will be conducted, and the evaluation criteria that will be used, and the basis of selection for Standing Offer award.

Part B - Standing Offer
- Standing Offer: includes the Standing Offer and the applicable terms and conditions.

Part C - Resulting Contract Clauses
- Resulting Contract Clauses: includes the clauses and conditions which will apply to any Contract resulting from a Call-ups made pursuant to the Standing Offer.

Annex and Attachments
1. Challenge-Based Standing Offer Solicitation and Attachments
2. Personas
3. Official Languages
4. Accessibility
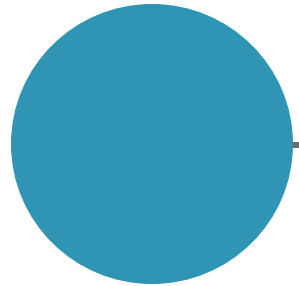
The following key principles govern the preparation of responses to questions received from Bidders in the context of a CBS.

➤ 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 to the CBS.

➤ We avoid giving answers to hypothetical situations or special cases, this task is delegated to the evaluators once the CBS is closed.
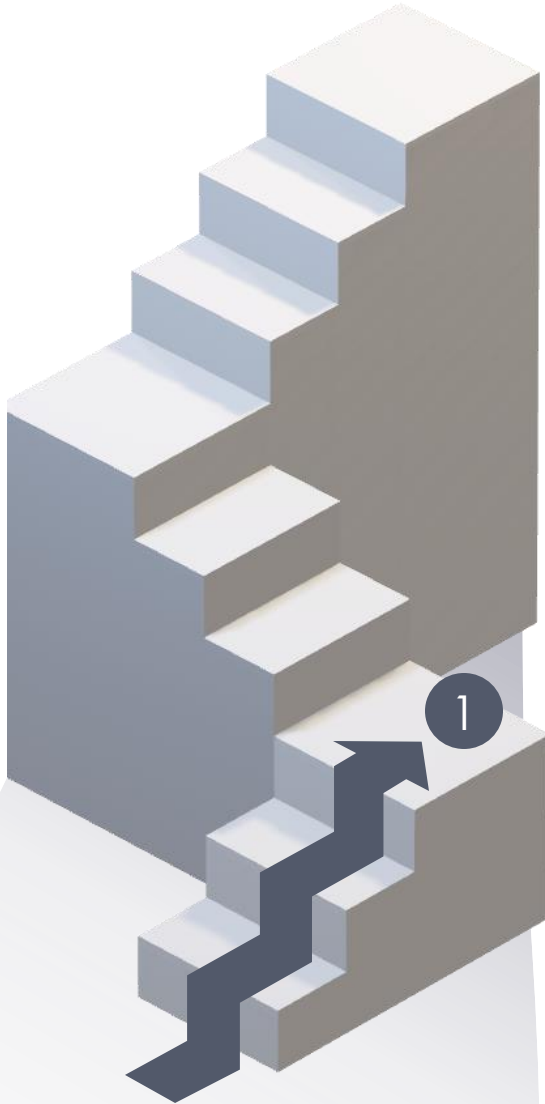
Question About the Procurement Process?
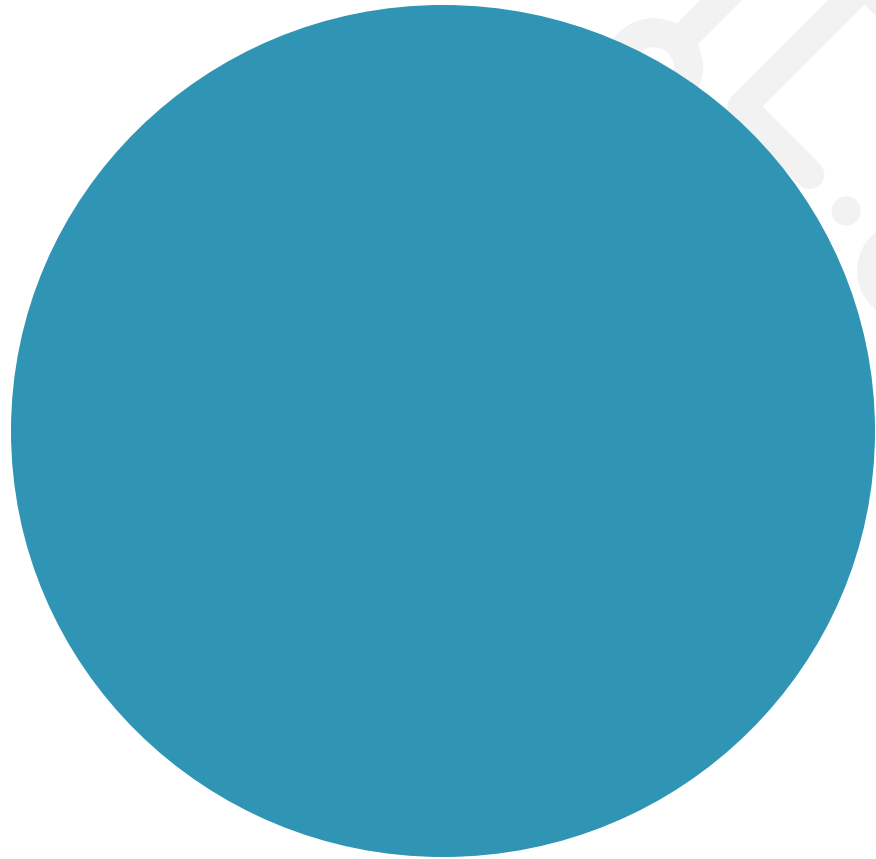
Please use the chat in MS Team...
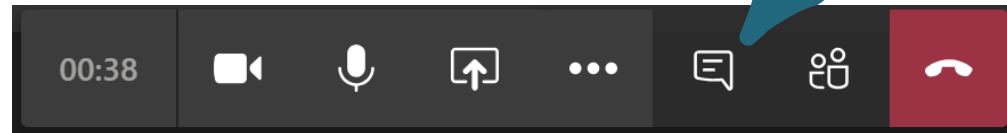
Appendix: Invitation to Refine Wave 1

Invitation to Refine Wave ①

The purpose of the one-on-one meetings with vendors as part of Invitation to Refine Wave 1 is to inform SSC of what is available on the market. This is not an evaluation process and participation in the one-on-one sessions is not a prerequisite to submitting an offer on this Challenge-Based Standing Offer Solicitation.

Draft: Agenda items

Introduction (5 minutes)

Presentation (40 minutes)
- Introduce the products and services you offer; talk about past collaboration successes with other large organizations.
- Describe how your professional service offering addresses our problem statement and challenges?
- Describe how your professional service offering addresses our requirements from the perspective of the personas or roles
- Describe how the professional service offering addresses concern around accessibility and official languages?

Closing thoughts for future discussions on this procurement process (Invitation to Refine),
    Are there areas in the MVR that could be enhanced or better described?
    Are there areas in the MVR that will be challenging to implement?

Questions (15 minutes)