

Automated Bidding Solution (ABS) Statement of Challenge

This document defines the Contractor's obligations and Canada's responsibilities under the resulting contract.

1. Background

Shared Services Canada (SSC) is looking for an Automated Bidding Solution (ABS) to support its Contract Simplification Strategy and [ScaleUp](#) pilot project. In fact, the solution will have an important contribution to the success of ScaleUp. ScaleUp is an initiative lead by SSC in collaboration with TECHNATION with the objective to facilitate the award of IT related goods, services and solutions contracts valued under \$238,000 to micro and small businesses¹ targeting Indigenous businesses and businesses owned or led by under-represented groups (women, visible minorities and persons with disabilities).

The Centre of Expertise in Agile and Innovative Procurement (CoEAIP) of SSC wants to standardize and simplify SSC's contractual documents and tools to improve efficiency and support the Government of Canada in its goal to modernize procurement.

Simplified procurement for stakeholders will be:

Equitable	Enable suppliers to better understand contracting documents and provide the same conditions to all suppliers
Consistent	Improved coherence of SSC contracting documents
Streamlined	Reduced lead time to issue contracts
Digital	Promotes electronic signature, paperless procurement and interactive tools
Open	Improved access including for SMEs and underrepresented groups to participate in government procurement

Currently, buyers manually construct contracts and there is no assembly system. Public Services Procurement Canada is launching a new suite of online procurement services called [CanadaBuys](#), which includes use of a web-based tool called SAP Ariba.

SSC uses a Procure-to-Pay (P2P) Solution, to electronically manage the procurement to payment processes and improved internal efficiencies by standardizing and streamlining the way we procure, pay, and interact with Suppliers. This is the first electronic procurement system with a Supplier self-service solution for Canada's procurement.

The P2P Solution modernizes business practices, expedites processing and payment, and increases transparency with Suppliers. It introduces an online collaborative format for purchasing with SSC and enables the consolidation of requirements and the optimization of procurement for SSC employees, management, and Suppliers.

Neither of these tools contain functionalities to allow bidders to easily submit bids online. These tools manage the financial workflow of procurement and allow for submission of static documents.

¹ Micro and Small Business means a business having fewer than 100 employees.

2. Problem Statement and Challenges

2.1 Problem Statement

Canada lacks the ability to automate the production and submission of bid submission documents.

2.2 Challenges specific to the Solution

- I. Documents required to submit bids are difficult to understand for Suppliers:**
Overly complex contractual documents and difficult to follow.
- II. Documents required to submit bids are labour intensive for Suppliers:**
The bid submission process is often based on submission of written documents where the bidders have to describe in writing their capacity.
- III. Configuration of Bid Submission document is labour intensive for buyers**
It takes time for buyers to configure a bid submission document for a given requirement.

3. Scope of the resulting Contract

The scope of the resulting contract is to resolve the problem and address the challenges identified in Section 2.

Evolving scope: Over the years, if the results of the solution are positive, it is possible that the problem statement will be updated to be used in other areas of expertise other than ScaleUp procurement.

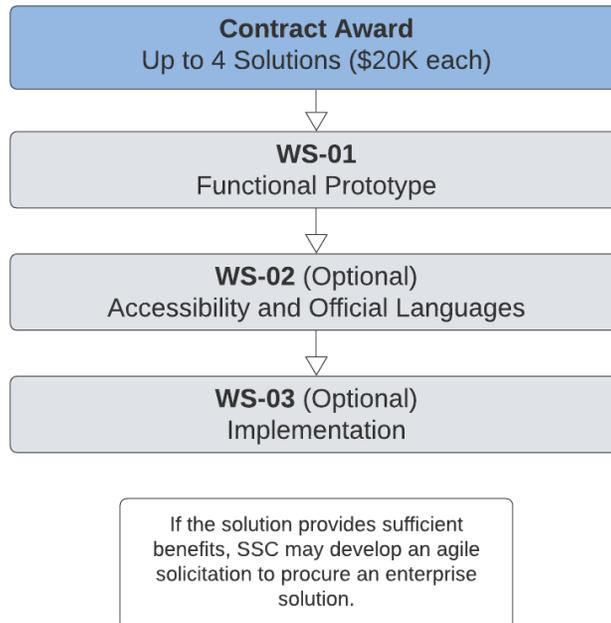
4. Contracting Process

4.1 Types of Work Segments (WS)

WS-01 – Prototype 1 – Functional Prototype: The Contractor must provide a solution prototype that meets the WS-01 MVR listed in section 8.2. Based on the results, one or more solutions will be chosen to move to WS-02.

WS-02 – Prototype 2 - Accessibility and Official Language: The Contractor must demonstrate that its solution meets the WS-02 MVR listed in section 8.3. Based on the results, one or more solutions will be chosen to move to WS-03.

WS-03 – Prototype 3 - Implementation: The Contractor must demonstrate that its solution meets the WS-03 MVR listed in section 8.4. The chosen solution(s) that has been customized to satisfy specific needs will then be further incrementally configured to add a “configuration by buyers” functionality and will be tested and used by buyers and suppliers for bid submission forms (BSF).



4.2 Work Location

The Work will be conducted in the Contractor’s premises and meetings will be held virtually.

4.3 Language of Work

The Work must be performed in one of the two official languages which will be the Contractor’s choice.

4.4 Configuration Specialist

The Contractor must provide the services of a Configuration Specialist who will be responsible for performing items identified in the key steps. In this case, Configuration Specialist and Contractor are referenced as being one and the same.

5. WS-01 – Prototype 1: Functional Prototype

5.1 Duration

WS-01 will have a duration of four (4) weeks.

5.2 Key Steps and Overview of Roles and Responsibilities

Participants are defined as users of the solution and could be comprised of members of the private sector as well as government employees.

The following key steps, roles and responsibilities will be applicable:

Key Steps	Canada will	Contractor must
1. Kick-off meeting	<ul style="list-style-type: none"> Provide the use case to be prototyped 	<ul style="list-style-type: none"> Organize the meeting. Confirm timelines and identify the collaboration approach
2. Use case instructions	<ul style="list-style-type: none"> Organize the collaborative sessions Finalize the use cases 	<ul style="list-style-type: none"> Provide input for the customization of the use cases
3. Communication Script	<ul style="list-style-type: none"> Provide feedback on the script 	<ul style="list-style-type: none"> Deliver and review the script
4. Configuration		<ul style="list-style-type: none"> Configure the solution based on the use case
5. Info-session	<ul style="list-style-type: none"> Identify a group of 10 participants to test the solution 	<ul style="list-style-type: none"> Provide prototype access to the 10 participants Deliver an info-session and provide its attendance report
6. Testing	<ul style="list-style-type: none"> Test the solution and provide feedback 	<ul style="list-style-type: none"> Provide support and answer questions to participants Refine the prototype
7. Results Report	<ul style="list-style-type: none"> Report on the performance of the solution 	
8. Assessment	<ul style="list-style-type: none"> Assess the solutions against the WS-01 MVR and determine which solutions move to the next WS 	

5.3 Deliverables

The following deliverables will be produced during WS-01.

Deliverables	Delivery Date
Contractor's deliverables	
Communication Script: Based on the use case developed at step 2 in section 5.2, the Contractor must develop an approach to transfer the use case info into the solution, provide a breakdown of the information and highlight the questions that will prompt the bidders' responses.	10 days after contract award
Functional Prototype: Based on the use case, the Contractor must deliver a prototype that meets the MVR.	12 days after contract award

<p>Info-session: The Contractor must deliver an info session to participants identified by Canada that includes at least the following elements:</p> <ul style="list-style-type: none"> • Organize the session on MS Teams • Instructions for connecting to the solution • How to access the Technical Support/Help Line point of contact • Demonstration of their solution 	<p>15 days after contract award</p>
<p>Canada’s Deliverables</p>	
<p>Use Case and Instructions: Canada will provide a use case and instructions for the Contractor to build the prototype. The instructions will include a checklist of elements to be included in their prototype.</p>	<p>Use Case Instructions Draft: at Contract award Use Case Instructions: 5 days after contract award</p>
<p>Testing instructions: Canada will provide instructions and a marking grid to the participants.</p>	<p>15 days after contract award</p>
<p>Performance Report: Based on users testing, Canada will produce a Solution Performance report.</p>	<p>30 days after contract award</p>

5.4 Moving from WS-01 to WS-02

Solutions that meets the WS-01 MVR listed in section 8.2, will be invited to move to WS-02.

6. WS-02 – Prototype 2: Accessibility and official languages

6.1 Duration

WS-02 will have a duration of four (4) weeks.

6.2 Key Steps and Overview of Roles and Responsibilities

Participants are defined as users of the solution and could be comprised of members of the private sector as well as government employees.

The following key steps, roles and responsibilities will be applicable:

Key Steps	Canada will	Contractor must
<p>1. Kick off meeting</p>		<ul style="list-style-type: none"> • Organize the meeting • Confirm timelines, and identify the collaboration approach
<p>2. Configuration</p>	<ul style="list-style-type: none"> • Provide instructions for the configuration of the Prototype 	<ul style="list-style-type: none"> • Configure the prototype to meet the WS-02 MVR

3. Info-session	<ul style="list-style-type: none"> Identify a group of 10 participants to test the solution 	<ul style="list-style-type: none"> Provide prototype access to the 10 participants Deliver an info-session and provide its attendance report
4. Testing	<ul style="list-style-type: none"> Test the solution and provide feedback 	<ul style="list-style-type: none"> Provide support and answer questions to participants Refine the prototype
5. Results Report	<ul style="list-style-type: none"> Report on the performance of the solution 	
6. Assessment	<ul style="list-style-type: none"> Assess the solutions against the WS-02 MVR and determine which solutions move to the next WS 	

6.3 Deliverables

The following deliverables will be produced during WS-02.

Deliverables	
Contractor’s deliverables	
Functional Prototype: Based on the use case, the Contractor must deliver a prototype that meets the MVR.	12 days after option 1 is exercised
Info-session: The Contractor must deliver an info session to participants identified by Canada that includes at least the following elements: <ul style="list-style-type: none"> Organize the session on MS Teams Instructions for connecting to the solution How to access the Technical Support/Help Line point of contact Demonstration of their solution 	15 days after option 1 is exercised
Canada’s Deliverables	
Configuration Instructions: Canada will provide instructions for the Contractor to configure the prototype. The instructions will include a checklist of elements to be included in their prototype.	5 days after option 1 is exercised
Testing instructions: Canada will provide instructions and a marking grid to the participants.	15 days after option 1 is exercised

<p>Solution Performance Report: Based on users testing, Canada will produce a Solution Performance report.</p>	<p>30 days after option 1 is exercised</p>
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6.4 Moving from WS-02 to WS-03

Should Canada choose to proceed with the implementation, Canada will use this Decision-Making Framework as a guide for deciding which Contractor’s Solution(s) will be selected to move to WS-03.

Canada will confirm that the Contractor’s Solution(s) meet the MVR, and include the optional prototype capabilities, that the Contractor committed to delivering as part of the Contractor’s Solution. In addition, the choice of the Solution(s) to be implemented will be made on the basis of “best fit”. In order to determine the best fit, Contractor’s Solution(s) will be compared and ranked for each factor.

Canada may in its sole and absolute discretion, consider factors other than the one listed below, by ensuring the prototype(s) selected result in best value in regards of resolving the problem and addressing the challenges or, if appropriate, the optimal balance of overall benefits to Canada.

The following factors will inform Canada’s decisions:

- Capacity of the solution to meet the MVR listed in section 8.
- Capacity of the solution to demonstrate non-compulsory requirements listed in section 9
- Easiness of use of the solution: the extent to which the solution is user centric.
- Level of participant satisfaction as measured by the **Solution Performance Reports** arising from WS-01 and WS-02.
- Capacity of the Contractor to be effective with regards to configuration of information on the smart enabled device (translation of the fields the Bidder has to fill to complete its bid on the mobile device).
- Capacity of the Contractor to be effective with regards to communication as demonstrated in their info session and the type of support they provided to the participants.
- Enterprise Costs such as costs of configuration, hosting, deployment, licences, and usage. Not only the costs of the contract but also the costs Canada may have to incur to implement the solution.

Canada may also remove one or more MVRs if **all** Contractors are not in a position to satisfy them.

If its solution has been chosen to move to WS-03, the Contractor will configure the solution for specific ScaleUp requirements on an as and when requested basis during WS-03. The Contractor will also develop the functionality that will enable the buyers to customize their solicitations under the solution on a case-by-case basis.

7. WS-03 – Prototype 3: Implementation

7.1 Duration

WS-03 will have a duration of one (1) year or as specified in the resulting contract.

7.2 Work Allocation Process (WAP)

The solution will be used to configure various bid submission forms (BSF) under ScaleUp.

The following key steps, roles and responsibilities will be applicable for each solicitation to be customized using the solution.

Key Steps	Canada will	Contractor must
1. Kick-off meeting	<ul style="list-style-type: none"> Identify and provide the procurement to be configured in a BSF and published 	<ul style="list-style-type: none"> Organize the meeting
2. Configuration		<ul style="list-style-type: none"> Configure and deliver the BSF
3. Validation of the Configuration	<ul style="list-style-type: none"> Provide feedback on the BSF customization 	<ul style="list-style-type: none"> Review and deliver the finalized BSF
4. Testing	<ul style="list-style-type: none"> Test the BSF 	<ul style="list-style-type: none"> Provide support services to resolve any issues
5. BSF availability	<ul style="list-style-type: none"> Coordinate the BSF publication and distribution to suppliers 	<ul style="list-style-type: none"> Make the BSF publicly available to suppliers.
6. Results report		<ul style="list-style-type: none"> Send survey on the solution usage to participating bidders Report on the solution performance based on the collected data
<i>The following steps will be applicable for additional configuration of the solution such as a functionality that enable Buyers to customize the solution</i>		
7. Refinement meeting	<ul style="list-style-type: none"> Identify refinements for the solution 	<ul style="list-style-type: none"> Organize the meeting
8. Configuration		<ul style="list-style-type: none"> Configure the solution and provide access to Canada
9. Validation of the Configuration	<ul style="list-style-type: none"> Provide feedback on the configuration 	<ul style="list-style-type: none"> Incorporate the changes requested by Canada and deliver the finalized configuration.
10. Testing	<ul style="list-style-type: none"> Test new functionalities Mobilize buyers that will configure the solution for their specific requirements 	<ul style="list-style-type: none"> Provide support services to resolve any issues
11. Additional functionality availability		<ul style="list-style-type: none"> Make the newly configured functionalities available to Canada's identified buyers
12. Results Report	<ul style="list-style-type: none"> Collect lessons learned about the added 	<ul style="list-style-type: none"> Send survey on the solution usage to participating Buyers

	functionalities performance	<ul style="list-style-type: none"> Report on the solution performance based on the collected data regarding the added functionality
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7.3 Deliverables

The deliverables and delivery dates for WS-03 will be specified at that stage.

8. Minimum Viable Requirements (MVR)

This section describes the expected minimum capabilities of the solution that must be demonstrated and may evolve as required. The solution must continue to meet all previous MVR throughout the next WS.

- the functional requirements: what the solution must do at all times and must be able to do when prompted; and
- the non-functional requirements: how the solution must interact with the environment and other devices.

8.1 User types

Bidder refers to a vendor submitting a bid using the Automated Bidding Solution

Buyer refers to Canada's representative responsible for a given procurement, that will customize a given solicitation on the solution

User refers to the Bidder and/or the Buyer

8.2 WS-01 MVR

A. Bidding on the phone / tablet

- A.1. The solution must enable the Bidder to enter information from a smart enabled device.
- A.2. The solution must enable the information to be displayed in the proper resolution and format of the device being used. The Bidder must not have to manipulate the image or screen to be able to read the information provided.

B. Supportive documents attached to bid

- B.1. The solution must allow the Bidder to attach PDF documents with their bid
- B.2. The solution must allow Users to insert hyperlinks

C. Response Mechanisms

- C.1. The solution must include the following response mechanisms
 - A. multiple-choice answers
 - B. open-field answers
 - C. self-assessment scoring
- C.2. The solution must have the functionality to save progress made by supplier when responding
- C.3. The solution must be have the functionality to provide feedback to suppliers (such as compliant, non-compliant, missing information)

D. Creation of the virtual bid

- D.1. The solution must allow for the use of digital signatures
- D.2. The solution must generate the bid in PDF
- D.3. The solution must confirm to the Bidder that the bid was uploaded successfully

E. Access

- E.1. The solution must provide an uninterrupted automated bidding platform to suppliers (24 hours a day, 7 days a week)
- E.2. The solution must accept responses submitted from suppliers using a Supplier Unique Identifier (SUI) provided by Canada to allow bid submission without any protected information.
- E.3. The solution must provide an open and free access to the Bidder
- E.4. The solution must allow for the Bidder to submit a bid without having register

8.3 WS-02 MVR

F. Official Languages

- F.1. The solution must allow Users must to enter customizable text on dashboards and in reports in either official language (English or French);
- F.2. The solution must include functionalities that allow users to fully work in either official language;
- F.3. The solution must allow Users to toggle between both official languages from any given page;
- F.4. The solution must allow Users to set their preferred official language for the interface;
- F.5. The solution must allow Users to select their preferred official language prior to launching;
- F.6. The solution must generate e-mails to Users in both official languages, as applicable;
- F.7. The solution's support services (telephone, e-mail, Web) must be available in both official languages; and
- F.8. The solution's training material and instructions must be available in both official languages.

G. Accessibility

- G.1. All Information and Communication Technology (ICT) components of the Solution must conform with the relevant accessibility requirements of EN 301 549 (2018). These components include, but are not limited to, web-based dashboards, reports produced by the software, product documentation, and support services;
- G.2. Information presented through visualizations, graphs and dashboard widgets for example, must be made available through non-visual means. Providing an alternate output, which presents the information textually, is sufficient to meet this requirement. The text version must provide the same information as the visualized version.
- G.3. Where documents are provided in more than one format, for example, a report provided in both PDF and Excel format, at least one of the formats must be accessible. The accessible version must provide the same information as the inaccessible version, and a notice must be posted indicating which format is accessible.

8.4 WS-03 MVR

H. Functionality information

- H.1. The solution must store the Bidder's information for the posting duration (1-3 months)
- H.2. The solution must send the electronic bids within one hour after bid closing to the buyers
- H.3. The solution must enable the buyer to confirm receipt of the bid
- H.4. The solution must send notification to the Bidder that its bid was received
- H.5. The solution must delete the bid after receiving confirmation of receipt from the buyer

I. Configuring the bidding form

- I.1. The solution must allow the Buyer to configure the procurement on desktop and smart enabled devices.
- I.2. The solution must be have the functionality to reflect the bidding form information that has been entered on a desktop and provide a preview of what it might look like on a smart enabled device.

9. Non-Compulsory requirements

The following non-compulsory requirements are not mandatory. They will be considered at the stage of making the choice of the solution that will be implemented and could potentially be considered during WS-02.

- 1) The solution should have interactive technical support.
- 2) The solution should have mechanisms that enable Canada to interact / collaborate with suppliers anonymously
- 3) The solution should provide analytics on suppliers' access and time spent in a specific form (including but not limited to how many have opened, viewed and submitted responses).
- 4) The solution should offer to the supplier the ability to fill-out a configurable satisfaction survey and provide analytics to Canada.