



# SHARED SERVICES CANADA

## Challenge-Based Solicitation (CBS)

For

## Robotic Process Automation (RPA) – Professional Services

Solicitation No.	2BS-1-91027/C	Date	2022-04-14
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### What We Heard Report

Under Agile Procurement Process 3.0 (APP3.0), Shared Services Canada (SSC) is piloting an improved model of engagement with the private sector. The goal is to collect supplier feedback throughout the procurement process and to quickly refine procurement elements, as necessary. SSC is committed to listening to suggestions from vendors with an open mind and reporting back to them in a transparent way.

Where We Heard	Evaluation Criteria Survey for Professional Services
When We Heard	March 17 <sup>th</sup> , 2022 – March 30 <sup>th</sup> , 2022

Thank-you for your feedback and questions about the Agile Procurement Process and various requirements.

<b>Key Findings</b>	<p>Thank-you to industry for providing feedback on the Professional Services Evaluation Criteria. Canada received a total of 10 survey responses after sending out a friendly reminder to firms and posting the survey notice on Buy and Sell.</p> <p>Most survey participants found they could pass the evaluation criteria ensuring a healthy eco-system.</p> <p>The main concerns identified by vendors were:</p> <ul style="list-style-type: none"><li>- Understanding Canada's rationale and the efficacy for the evaluation criteria of Building a Community of Experts (60% of respondents indicated the criterion was useful),</li><li>- Clarity of scoring for each criteria and overall weighting for criteria (70% of respondents indicated criteria are clear; however 60% of respondents wanted more clarity on scoring for building a community of experts),</li><li>- Sufficient amount of time for virtual demonstrations (63% of respondents in favour of time allocation), and</li><li>- Understanding why Work Segments are not being evaluated.</li></ul> <p>As a result of these key findings, we are making some changes to the Evaluation Criteria and more details can be found below in this report.</p>
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### Theme: Build a Community of Experts

#### What We Heard - 1

Why is the firm's capacity to *build a community of experts* a mandatory criterion? What value does this criterion bring?

#### SSC's Remarks - 1

This criterion was suggested by vendors last summer. We liked the idea of identifying RPA firms that are strategically committed to and have expertise in the field. We think this commitment and expertise is so essential that we made this a mandatory question.

Feedback indicated that we limited our definition of outreach to event based activities. Additional suggestions included other types of outreach methods such as newsletters or blogs and extending the timeframe from 3 years to 4 years due to COVID restrictions. We hope to see small and medium enterprises participating in our RPA Professional Services ecosystem.

To reiterate the purpose of this question is to identify and evaluate RPA firms, not individuals (RPA resources) who are strategically committed and have expertise in the RPA field.

### Theme: Scoring and Weights

#### What We Heard - 2

The scoring method and values for each evaluation question appear to be inconsistent with our desired outcome.

#### SSC's Remarks - 2

Thank-you for sharing feedback, highlighting confusion, and suggesting ideas.

Canada will be making the following changes to the scoring and weights for each question or section of the Evaluation Criteria.

1. In the section for *Building a Community of Experts*, we are eliminating the complex point system for the type of role at an event, such as presenter, organizer or led the event. A simplified scoring metric will replace the current evaluation.
2. We expanded the event definition to include specific activities such as blogs and newsletters and Videos that focus on RPA.
3. In an effort to simplify scoring, we will introduce weighting.

Interested partners will first need to get a minimum pass mark of 60% for the written submission. Those who receive the minimum pass mark will be invited to a virtual demonstration.

In the virtual demonstration we are working on the weighting of each section; however, an overall pass mark of 60% for the virtual demonstration will be required.

Overall, realizing benefits for clients will be weighted more heavily and the remaining three criteria: Building a community of experts, HR approach, and Buy-In & Adoption are weighted equally. Please refer to the evaluation criteria in the forthcoming CBSOS amendment for full details.

### Theme: Time Allocation for Virtual Demonstration



<b>What We Heard - 3</b>	We received feedback asking for more time or redistributing the amount of time to address the evaluation criteria.
<b>SSC's Remarks - 3</b>	<p>The Technical Authority and the Agile Procurement team agreed to additional time for the Virtual Demonstration. We look forward to your concise and descriptive presentations.</p> <p>We are making the following changes based on your request to redistribute and increase the amount of time for the Virtual Demonstration:</p> <ol style="list-style-type: none"><li>1. The Evaluation Criteria will no longer prescribe the time for each section.</li><li>2. Vendors will have 90 minutes to respond to the 3 criteria in the virtual demonstration portion of the evaluation. There will be no separate time for questions and answers as the team will ask questions of clarity as needed during the presentation.</li></ol> <p>The Evaluation Criteria initially prescribed 20 or 30 minutes per section; with the new changes, PS firms have flexibility and can decide how to use their time effectively.</p>
<b>Theme: Evaluation of Work Segments</b>	
<b>What We Heard - 4</b>	Vendors asked why work segments were not being evaluated.
<b>SSC's Remarks - 4</b>	<p>Because the needs of each department will vary, the work segments represent a framework on which Government of Canada departments can base their call up request.</p> <p>The intent is to further evaluate vendors technical capabilities on a per Call-up Basis with criteria specific to the Call-up. This approach allows vendors to be evaluated more directly in relation to the work being requested. Likewise pricing will be requested on a per Call-up Basis.</p> <p>The Competitive Call-up Allocation Methodology will be decoupled from the close date of the CBSOS so that it can be developed with adequate consultation from Offerors. It will then be amended into Standing Offers following initial Standing Offer Award.</p> <p>The intention is to create a RPA Professional Services ecosystem of vendors that can fulfill various RPA professional services needs independent of technical solution platforms. The standing offer evaluation criteria is being used to assess the capacity of firms to meet RPA professional services needs; whereas, the call up will be used to identify factors and skills pertinent to work segments and tasks completed by firms or individual resources.</p> <p>Departments may choose to assess experience in a specific work segment or with a specific platform; however, the team's intention based on vendor feedback is to create a professional services eco-system where the work of vendors can stand independent of defined work or technical solutions.</p>