



SHARED SERVICES CANADA
Challenge-Based Standing Offer Solicitation (CBSOS)
For
Robotic Process Automation (RPA) Professional Services (PS)

Solicitation No.	2BS-1-91027C	Date	May 20, 2022
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What We Heard Report AND Questions and Answers

Under Procurement Process 3.0, 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.

What We Heard No.	3
Where We Heard	ITR Wave 2
When We Heard	April 2022

What We Heard - 1	Payment There seems to be some confusion regarding the payment methods.
SSC's Remarks - 1	The CBSOS includes the option for Client Departments to request: <ul style="list-style-type: none">• Fixed Price based price submissions, (Type 1 Call-up)• Per Diem based price submissions, or (Type 2 Call-up)• A combination of Fixed Price and Per diem as specified in the Call-up (Type 3 Call-up) Note: Type 4 Call-ups are intended for Solution Improvement and will be further clarified below, and payment aspects will be defined and incorporated per Solution Improvement.



What We Heard - 2	Type 4 Call-ups
There seems to be some confusion regarding Type 4 Call-ups.	
SSC's Remarks - 2	The intent of this procurement vehicle is to provide professional services that respond to the problem statement. As the needs of the problem statement may not be static, Type 4 Call-ups exist to allow Offerors to propose additional Professional Services work categories or Professional Services Work Segment elements that may be required to keep pace with the evolution of RPA technology.

What We Heard - 3	Thresholds to Qualify
We have heard concerns that neither the Work Streams or the Resource Categories are being evaluated as a criterion under the CBSOS.	
SSC's Remarks - 3	Canada's intention under this process is to evaluate Firms that are capable in the RPA Space. We feel that by Evaluating a firm's track record to: <ul data-bbox="253 1031 1419 1171" style="list-style-type: none">• committing to building knowledge in the community of RPA experts,• demonstrating their ability to realize benefits for clients using RPA technology,• and demonstrating capacity for change management to ensure that adoption of the new technology is successful, is-sufficient to determine a firm's qualifications to deliver in the RPA space. While we did Further as we are interested in firms' capacity to continually renew itself, we are also interested in evaluating how vendors attract, retain and develop talent, given that based on earlier vendor feedback, RPA is an emerging technology with a limited pool of resources.

What We Heard - 4	Evaluation of Experience Vs Capacity and Potential
We did hear recommendations from Vendors concerned that the evaluation criteria may not evaluate the past experience sufficiently to result in a pool of dedicated RPA Professional Services Suppliers.	
SSC's Remarks - 4	



The Evaluation Criteria were drafted with the following principals in mind and include an effort to ensure SME participation.

- Develop an outcome-based evaluation system which has less to do with the number of years and scale of the project then the result.
- Develop an ecosystem of companies with specific RPA professional services experience (as opposed to professional services writ large)
- Create an ecosystem that holds both SME and Large-scale companies since this is a growing field because today's SMEs companies will be tomorrow's large companies.
- Evaluate the firms' experience with RPA; leaving the departments to assess their best fit at the Call-up Stage.

While some recommendations were sound, given the principles above, they may be further considered at the Call-up Stage.

What We Heard - 5

CBSOS Evaluation Vs. Call-up Methodology

SSC's Remarks - 5

While we did receive many good suggestions on how to evaluate the Work Stream and Resource Categories, it is Canada's intent to design a Call-up Allocation Methodology that assesses those aspects more specifically at the Call-up stage, so that they can be directly linked to the work defined at Call-up.

What We Heard - 6

Distribution of Points in the Evaluation

SSC's Remarks - 6

We have had questions from Vendors as to the weighted distribution of points in the evaluation criteria of the CBSOS. Canada has distributed points in accordance with the importance we place on each criterion. For example, the Ability to Realize Benefits is weighted most importantly given that ultimately, we are measuring a firm's ability to deliver.



What We Heard - 7

Diversity

We have heard from Vendors that there is an opportunity through this procurement to promote Canadas policies on building the capacity of underrepresented groups.

SSC's Remarks - 7

As a response we have added language to criteria 3.4 *Other Factors of Talent Recruitment, Retention and Diversity of Underrepresented Groups*, to give Vendors the opportunity to showcase how they meet these elements. Whereas Canada is not interested. Note: Canada is interested in overall policies and strategies for recruitment and retention in relation of underrepresented groups, not information on specific individuals.

What We Heard - 8

Small Medium Enterprises

We have had questions as to how this procurement promotes Small and Medium Enterprises.

SSC's Remarks - 8

Through this procurement Canada has listened to the feedback from industry and as a result has made efforts to avoid criteria that may restrict SMEs from participating or qualifying in this vehicle. Further, Canada may design elements of the Call-up process to further promote SMEs and other Underrepresented groups.

What We Heard - 9

Request to Remove Quarterly Usage Reports

We have heard from vendors that they would like to remove the burden of Quarterly usage reports.

SSC's Remarks - 9

While Agile attempts to remove bureaucracy at all steps, we require this information for two reasons. First, SSC intends to sub delegate call-ups authority to Client departments. With numerous departments and a smaller, limited number of Vendors, it is more feasible to have vendors report on usage.



Second as this Agile tool is a new type of process and vehicle, Canada has a need to understand usage, which will come from the Quarterly Usage Reports.

What We Heard - 10

Turn-around Time for Presentations for Evaluations

We heard from Vendors that the time between when vendors are given notice that they have been successful in passing the written portion of the evaluation to when they are expected to provide a demonstration was too short.

SSC's Remarks - 10

In response Canada acknowledges that it takes time to align schedules. As such we are extending the minimum time notice given to vendors before they present from 24 hours to 5 calendar days.

Questions & Answers

Question - 1

Q1: For Criteria #1, Does an "event" refer to a single instance on a single day, or would an on-going community engagement, such as a bi-weekly mentoring/training session, or multi-day event (such as hackathon), be considered an event and all hours put towards it can be captured for the one "event" entry.

SSC's Answer - 1

A1: The distinction is linked to the separation of events. A multi day event with no separation is considered one event. In contrast each instance of a recurring event, such as a weekly or quarterly event is considered a separate event.

Also not included are:

- Mentoring (one on one)
- Paid delivery of Instruction or coursework



Question - 2

Q2: For Criteria 2, does a single project/client engagement have to be used to provide evidence for all sub-criteria listed, or can we mix and match projects/clients to demonstrate the sub-criteria if required.

SSC's Answer - 2

A2: To score the maximum points the Offeror would need to present up to 3 separate projects, and within those projects demonstrate how each project addresses each criterion by:

- identifying the goal of the project,
- highlighting qualitative and quantitative outcomes achieved,
- demonstrating the capacity of the vendor to **meet** or **exceed** the goals of the client through the use of its professional services, and
- illustrating which **Trade-offs** were minimized and how benefits were realized.

Further the vendor is not required to describe every item listed under the bullets titled 'Examples of Evidences' for 'Meeting' or 'Exceeding' goals or 'minimizing Trade-offs' at bullets 2.1.1 and 2.1.2. These are stated as examples to guide vendors in the types of evidence that Canada is expecting to see in order to award points.

Question - 3

Q3: Do we want to incorporate 3rd Party Reviews as a means of evaluating firms?

SSC's Answer - 3

A3: While we do appreciate this suggestion, at this point we do not feel that using 3rd party reviews would capture the full scope of professional services firms capable of performing the work, specifically in the Canadian Market in addition to SME's.