

# Agile Toolkit Solution (ATS)

## Statement of Challenge

### 1. Background

The Centre of Expertise in Agile and Innovative Procurement (CoEAIP) from the Enterprise IT Procurement Directorate (EITP) within Shared Services Canada (SSC), requires an Agile Toolkit Solution (ATS) to assist CoEAIP in the dissemination of information related to the Agile Procurement Process (APP3.0) and Agile Procurement Learning Initiative (APLI).

SSC and the CoEAIP are committed to providing SSC employees with the knowledge needed to execute better buying approaches. As part of the deployment of APP3.0, CoEAIP has developed training curriculum within APLI, which includes modules specifically designed to assist Procurement Officers with the inclusion of multiple agile principles into their day-to-day procurement processes. Additionally, as the APP3.0 matures and is used by more buyers within EITP, a centralized location for the tools, templates and reference documents related to the program must be accessible and easy-to-navigate for interested parties.

SSC requires expertise to improve engagement and navigation of the Centre of Expertise in CoEAIP's SharePoint community site as well as make recommendations to improve user experience while accessing the APP3.0 Toolkit.

### 2. Problem Statement and Challenges

#### 2.1 Problem Statement

SSC lacks expertise to build and manage a SharePoint community site that enables Users to effectively find and share the tools, information and guidance related to the APP3.0 Toolkit.

#### 2.2 Challenges:

**2.2.1** Users (defined at 3.3 below) cannot easily find tools, documents, or templates (i.e., the APP3.0 toolkit) when running an agile procurement process or participating in APLI training

The APP3.0 toolkit is composed of more than 75 templates, documents and training located in multiple sources (such as the Government of Canada's official repository - GCDOCS, SharePoint, local desktops and locations that are external to SSC's network). It is difficult for Users to rapidly find the relevant information they need at any given stage of the design of the process. Additionally, Users with less experience in the Agile Procurement domain have additional difficulties navigating the Toolkit as they do not have sufficient knowledge to know what type of document they are searching for.

**2.2.2** EITP does not have in-house expertise to improve its existing application environment

SSC employees have access to many applications for improved collaboration, facilitation, and automation for information sharing, but EITP lacks the experience and knowledge with

SharePoint or its add-ons. EITP requires additional support to improve its existing infrastructure with software solutions to improve engagement and use of its toolkit.

**2.2.3 Document management of EITP’s current environment is very task-heavy with a high level of redundancy in document storage and information sharing tools**

Documents are manually uploaded to the repository found on EITP’s SharePoint as well as to EITP’s official document repository on GCDOCS). Updating documents, links, and other items is a manual process that requires constant oversight by EITP employees. Additionally, there is currently no way that EITP can evaluate the usage or “engageability” of the toolkit in an automated way.

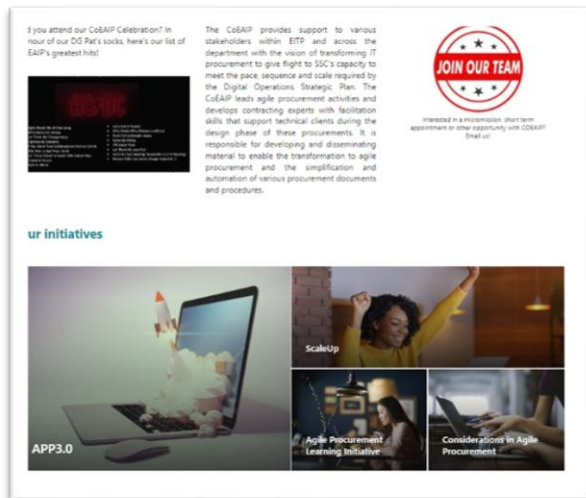
**3. Scope of the resulting Contract**

The scope of this Agile Procurement (AP) is to improve problem resolution and address the challenges incrementally. The problem statements stated above describes a multifaced situation. During the contracting stage, the contractor will contribute to resolve the problem incrementally and address the challenges. The proposed resolution method (RM) acquired under the AP may be made available to various sections of SSC. Therefore, the problem resolution will be progressive during the course of the contracting stage.

**4. EITP’s Current IT Environment**

**4.1 CoEAIP’s Infohub**

The APP3.0 Toolkit refers to all the material developed by SSC to support the APP3.0 and APLI to develop the agilist function. The toolkit is composed of more than 75 documents including templates, reference documents, presentations, and training. The material comprises the following formats: MS Word, MS Excel, MS PowerPoint, MS Forms, PDF, and hyperlinks internal and external to SSC.



CoEAIP currently uses an M365 SharePoint community site to house documents related to the APP3.0 toolkit that are meant to be shared with EITP employees. EITP has integrated the use of SharePoint lists, site pages, and other tools, but the functionality is basic and end users report some difficulty finding specific documents, especially those that are not yet housed on the Infohub site.

CoEAIP has had to rely on the expertise provided by SSC’s CIO team, but access to those services is restricted to specific issues related to the function of the site, rather than ongoing support and integration of improvements to the content.

The current community site is restricted to EITP employees owing to pre-existing reporting requirements of the APLI.

## 4.2 Available Software

SSC workstations come equipped with the following standard software and applications

- Microsoft 365 - which includes Word, Excel, Power Point, SharePoint, One Note Publisher and Outlook
- Microsoft Edge
- Cisco AnyConnect
- Cisco WebEx Suite
- Entrust Entelligence Security

Other standard software is available through SSC's Company Portal including:

- Adobe Reader
- Antidote
- Foxit PDF
- GCdocs Enterprise Connect
- Markido Engage
- Power BI Desktop

Non-standard software (including Freeware, Shareware, and Opensource) can be requested upon request and approval by SSC's Chief Information Office team.

## 5. User types

**Admin:** refers to EITP employees that are responsible for the maintenance of the CoEAIP Infohub and ATS. Admin (CIO Admin) may also refer to other SSC employees who are responsible for the rollout of M365 and its applications. CIO Admin have more experience and ability to modify the existing environment compared with EITP employees.

**User:** refers to SSC's representative that will use the Infohub. Typically, the user is either responsible for an agile procurement or is a student of the APLI. There are 3 levels of expertise of Agile Procurement at SSC that are developed via the APLI program:

Awareness – campaign that brings awareness of Agile Procurement to SSC employees via introductory training opportunities

Enablers – SSC buyers that integrate innovative agile procurement mechanisms competitive procurements but who have not acquired the skills and competencies to manage an entire Agile Procurement process.

Agilists – SSC buyers who use the APP3.0 framework as a systematic approach

Currently, the majority of CoEAIP's Infohub Users are at the Awareness level of the APLI program.

## 6. Work Location

The work will be conducted virtually through MS Teams or on-site at 400 Cooper, Ottawa, if required.

## 7. Language of Work

The Work will be performed in English.

## 8. Contracting Process

### 8.1 Types of Work Segments (WS)

WS-01 – ATS Strategy: The Contractor must provide the Agile Toolkit Solution (ATS) Strategy, a document that incorporates recommendations to improve the User experience of and reduce Admin workload in the management of CoEAIP’s current SharePoint community site, the CoEAIP Infohub and CoEAIP’s document repository, the APP3.0 Toolkit. The ATS Strategy must incorporate recommendations that will produce an information-sharing platform that fully addresses the challenges set out by Canada and resolves its problem. The Contractor will also provide the ATS Guide, a document that provides step-by-step instructions on how to implement the changes to CoEAIP’s Infohub and Toolkit. Based on the results of WS-01, Canada will decide whether to move to WS-02.

WS-02 – Implementation (optional): During the implementation phase, the Contractor will have access to SSC’s network to make improvements to the Infohub and Toolkit. During WS-02, the Contractor will implement the solution in accordance with the ATS Strategy, update the ATS Guide, and provide on-going support to EITP Admin in the management of the solution.

### 8.2 WS-01 – ATS Strategy

#### 8.2.1 Duration

The duration of WS-01 will be from contract award to March 31, 2023.

#### 8.2.2 Security

WS-01 does not require security clearances for the Contractor or its resources. The Bidder and its resources will not have access to Protected information or sites. Please see attachment B for more information.

#### 8.2.3 Key Steps and Deliverables

Key Steps	SSC Input	Contractor Obligations
	<b>During the course of the contract, SSC will</b>	<b>The contractor must perform the following tasks including but not limited to:</b>
Kick-off meeting	Provide a list of SSC attendees  Provide a walk-through of CoEAIP’s current Infohub page, and clarify contractor’s obligations under the contract when needed	Organize the meeting:  <ol style="list-style-type: none"><li>1. Send the invitation</li><li>2. Manage the discussion</li><li>3. Send written summary within 5 working days</li></ol>

<p>Strategy Development</p>	<p>Be available to provide supplier with insight into the CoEAIP environment</p> <p>Provide more information about CoEAIP's needs with respect to the Toolkit and Infohub.</p> <p>Engage with internal SSC experts with respect to security and capacity to order recommended applications.</p>	<p>Organize as-required meetings with EITP Admin to better understand the current Infohub and Toolkit to aid in the drafting of the ATS Strategy.</p> <p>The meeting frequency should be no more than twice weekly and duration for no more than 1 hour per meeting.</p>
<p>ATS Strategy and ATS Guide</p>	<p>Provide feedback on the draft ATS Strategy and ATS Guide</p> <p>Approve ATS Strategy and ATS Guide</p>	<p>Provide SSC with options to address the challenges using CoEAIP's existing IT environment and propose software solutions that could improve user experience in accessing the APP3.0 Toolkit and APLI program.</p> <p>Produce the draft ATS Strategy and ATS Guide</p> <p>Update and finalize ATS Strategy and ATS Guide</p>

Deliverables		Delivery Date
<b>The contractor must produce the following deliverables:</b>		
<b>ATS Kick-off Meeting</b>	The supplier must coordinate the meeting between SSC and its resource(s).	Within 2 business days of contract award
<b>Draft ATS Strategy</b>	<p>The supplier must present its draft ATS strategy to resolve the problem and address the challenges.</p> <p>The ATS Short-term Strategy must include as a minimum:</p> <ul style="list-style-type: none"> <li>• A work breakdown structure that describes the activities and the timelines required for improvement of CoEAIP's Infohub</li> <li>• Toolkit improvements including document repository management</li> <li>• Automation recommendations to reduce task redundancy</li> </ul>	March 17

	<ul style="list-style-type: none"> <li>Recommendation of software/applications required to implement the changes</li> </ul>	
<b>Final ATS Strategy</b>	<p>The supplier must present its strategy for producing the ATS to resolve the problem and address the challenges.</p> <p>The ATS Long-term Strategy must include as a minimum:</p> <ul style="list-style-type: none"> <li>A work breakdown structure that describes the activities and the timelines required for an ATS (which may or may not be SharePoint-based)</li> <li>Options and recommendations to resolve the problem and address the challenges</li> <li>Recommendation of software/applications that will help resolve the problem and address the challenges</li> </ul>	March 31, 2023
<b>ATS Guide</b>	<p>Based on the approved recommendations from the ATS Strategy, provide written step-by-step guidance on how to implement the changes that includes at least the following elements:</p> <ul style="list-style-type: none"> <li>instructions on how to share/upload images, documents, videos and other applications to the SharePoint site</li> <li>instructions on how to automate SharePoint reporting functions, management of repository and interactions between different applications</li> <li>best practices for creating engaging SharePoint community sites</li> <li>incorporation of recommended software/applications to improve usability</li> </ul>	<p>Within 5 business days of approval of the Draft ATS Strategy.</p> <p>Finalized by March 31, 2023</p>

**8.3 Moving from WS-01 to WS-02**

Should Canada choose to proceed with the implementation, Canada will use the Decision-Making Framework (see Section 10 below) as a guide for deciding which Contractor’s solution will be selected to move to WS-02.

**8.4 WS-02 – Implementation**

**8.4.1 Duration**

WS-02 will have a duration of one (1) year.

**8.4.2 Security**

SSC security requirement will be provided to the Contractor in accordance with the Security Requirement Checklist (SRCL) attached in Annex A for any resource requiring access to up to Protected B information. Please see attachment B for more information

### 8.4.3 Key Steps and Deliverables

Key Steps	SSC Input During the course of the contract, SSC will:	Contractor Obligations. The contractor must perform the following tasks including but not limited to:
Implementation the ATS	Identify EITP employees that will be trained by the contractor (Admin)  Provide User feedback on the useability of solution and the ATS Guide	Based on the approved ATS Strategy, configure, develop, and implement the ATS.  Test the ATS leveraging a pool of users identified by SSC.  Adjust and improve the ATS incrementally.  Provide SSC with an updated ATS Guide on how to implement and make changes to solution.  Provide an introductory video that highlights the functionality of the site aid Users navigation and engagement of the site.  Attend scheduled and ad-hoc meetings in support of the solution implementation.

Deliverables	Delivery Date	
<b>The contractor must produce the following deliverables:</b>		
<b>ATS Implementation Kick-off Meeting</b>	The Contractor must coordinate the meeting between SSC and its resource(s).	Within 5 business days of WS-02 contract amendment
<b>ATS Implementation</b>	The Contractor must implement the ATS to resolve the problem and address the challenges.  During implementation, the Contractor must: <ul style="list-style-type: none"> <li>• Implement changes to the Toolkit and Infohub that align with the recommendations from the ATS Strategy</li> <li>• Provide weekly update meetings where the Contractor:               <ul style="list-style-type: none"> <li>○ provides a walkthrough of the updates made</li> </ul> </li> </ul>	The ATS will be fully implemented by June 30, 2023

	<ul style="list-style-type: none"> <li>○ provides step-by-step guidance on how EITP Admin will manage the updated Toolkit and Infohub</li> <li>○ receives feedback and makes necessary adjustment to ATS based on that feedback</li> <li>○ provides updates to recommendations based on current market offerings</li> <li>● Work with CIO Admin to implement the more complex and challenging recommendations</li> <li>● Update the ATS Strategy to include additional improvements and recommendations that are discovered during implementation.</li> </ul>	
<b>ATS Release</b>	<p>After the Infohub has been updated in accordance with the ATS Strategy, the Contractor will provide a short video highlighting all the updates to the site as well as tips and tricks for Users to use the Infohub to its full potential. The video must include:</p> <ul style="list-style-type: none"> <li>● A synopsis of the site, including a brief description of each page.</li> <li>● Guidance features that aid in navigation</li> <li>● Other functionality that is exclusive to the SharePoint environment</li> </ul>	June 30, 2023
<b>ATS Guide</b>	<p>Based on the approved recommendations from the ATS Strategy, provide written step-by-step guidance on how to implement the changes that includes at least the following elements:</p> <ul style="list-style-type: none"> <li>● instructions on how to share/upload images, documents, videos and other applications to the SharePoint site</li> <li>● instructions on how to automate engagement analyses, management of repository and interactions between different applications</li> <li>● best practices for creating engaging SharePoint community sites</li> <li>● incorporation of recommended software/applications to improve usability</li> </ul> <p>The Contractor must update the ATS Guide to incorporate additional instructions or guidance that arise as a result of the implementation process.</p>	June 30, 2023



<b>ATS Maintenance</b>	After the ATS has been implemented, the Contractor must provide support to EITP Admin on an as-and-when-requested basis.	
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**9. Expectations**

**9.1 Definitions**

**CoEAIP Infohub:** The Centre of Expertise in Agile and Innovative Procurement (CoEAIP)’s SharePoint community site.

**APP3.0 Toolkit:** All the material developed by SSC to support the APP3.0 and APLI to develop the agilist function. The toolkit is composed of more than 75 documents including templates, reference documents, presentations, and training. The material comprises the following formats: MS Word, MS Excel, MS PowerPoint, MS Forms, PDF, and hyperlinks internal and external to SSC.

**Admin:** refers to EITP employees that are responsible for the maintenance of the CoEAIP Infohub and ATS. Admin may also refer to other SSC employees who are responsible for the rollout of M365 and its applications. These Admin have more experience and ability to modify the existing environment compared with EITP employees.

**User:** refers to SSC’s representative that will use the solution. Typically, the user is either responsible for a given agile procurement or who is a student of the Agile Procurement Learning Initiative (APLI).

**9.2 WS-01: ATS Strategy**

The ATS Strategy must:

1. Address the challenges by improving CoEAIP’s existing platforms (Infohub, GCDOCS, SharePoint, etc)
2. Be structured in accordance with the APP3.0 workflow and link to the APLI program.
3. Improve accessibility of the Infohub in accordance with established accessibility standards.

Admin

1. Show the Admin how to modify, remove and add content of the Toolkit.
2. Reduce task redundancy related to document management and engagement analyses.
3. Provide the Admin with how-to and step-by-step guides to implement changes to the Solution.
4. Allow the Admin to upload and download documents in the following file formats: PDF, DOC, XLS, PPTX, MP4, and JPEG or PNG or GIF.
5. Incorporate existing applications and applications that are readily available to SSC employees.

User

1. Improve User navigation compared with current Infohub.

2. Improve User engagement compared with current Infohub.

### **9.3 WS-02: ATS Implementation**

The ATS must:

1. Implement recommendations from the approved ATS Strategy.
2. Establish standards for the Toolkit repository (on existing platforms, i.e., SharePoint and GCDOCS) management.
3. Implement protocols for updating information in the toolkit.
4. Automate portions of the Infohub site management including site registration, site analytics, and repository maintenance.
5. Align with official language and accessibility requirements in accordance with the Official Languages Act and Accessibility Act.

Admin

1. Allow the Admin to modify, remove and add content of the Toolkit.
2. Reduce task redundancy related to document management and engagement analyses.
3. Provide the Admin with how-to and step-by-step guides to implement changes to the Solution.
4. Allow the Admin to upload and download documents in the following file formats: PDF, DOC, XLS, PPTX, MP4, and JPEG or PNG or GIF.
5. Incorporate existing applications and applications that are readily available to SSC employees.
6. Enable the Admin to create prompting questions and proposed multiple choice answers that link them to specific material from the Toolkit
7. Enable the Admin to upload documents in one location to display across multiple pages.

User

1. Allow the User to choose between direct access to the toolkit or guided access by answering prompted questions to direct them to the material.
2. Allow User to access and download the material contained in the toolkit by keywords, topics, stages and by clicking on a workflow image.

## **10. Decision-making Framework**

Canada will confirm that the Contractor's ATS meets the Expectations that the Contractor committed to delivering as part of the Contractor's solution. In addition, the choice of the Solution 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 ATS-selected results 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:

- The ATS Strategy demonstrates the capacity of the solution to meet the Expectations listed in section 10.
- Easiness of use of the solution: the extent to which the solution is user-centric
- Capacity of the Contractor to be effective with regards to describing how implementation will proceed
- Recommendations are achievable and manageable by EITP Admin after receiving guidance
- Capacity of the Contractor to be effective with regards to communication as demonstrated in their weekly working sessions with EITP and the type of support they provide to the participants.
- Enterprise Costs such as costs of configuration, hosting, deployment, licenses, and usage. Not only the costs of the contract but also the costs Canada may have to incur to implement the solution.

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

If its solution has been chosen to move to WS-02, the Contractor will configure the solution for the InfoHub requirements and provide ongoing support to EITP in the site maintenance on an as-and-when-requested basis during WS-02.

## **11. Options**

The following options may only be exercised by the Contracting Authority and will be evidenced, for administrative purposes only, through a contract amendment. The Contracting Authority may exercise the option by sending a written notice to the Contractor at any time. The options may be exercised multiple times.

### **11.1 Option 1: WS-02**

During the execution of Option 1, Canada will require the Contractor to implement the ATS based on the recommendations provided during WS-01.

### **11.2 Option 2: Improvements to other SharePoint Community Sites (Additional WS-01)**

During the execution of Option 2, Canada will require the Contractor to provide a Strategy, Guide and Implementation plan for different community that are currently in use or are under development by EITP employees.

### **11.3 Option 3: Implementation of Solution for other SharePoint Community Sites (Additional WS-02)**

During the execution of Option 3, Canada will require the Contractor to implement the recommendations from the new Strategy and create and update the Guide in accordance with the needs of the users and Admin for the site.