



Agile Procurement

CRA Digital Mailroom Project (Overview)

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DMP Requirement Overview

Digital mailroom solution was to provide a fully integrated and secure enterprise-wide service that includes the following capabilities:

- 1. Receive** - Paper correspondence is received, opened and, if required, sorted; digital correspondence is received and virus scanned;
- 2. Digitize and/or Scan** - Documents are converted to digital images;
- 3. Extract** - Data from the image is extracted through automation and/or manual keying and made available in a format ingestible by Agency systems;
- 4. Store** - The images are stored so that they may be accessed by program areas, and disposed of according to the associated disposition requirements; and
- 5. Notify** - Program areas are notified when data is available and submitters are advised that the Agency has received their correspondence.

Why Agile Procurement approach was selected ?

- Limited technical expertise in such a complex project - Engaging private sector in looking for a solution
- Promoting innovation and the “outside the box thinking”
- Supporting the results-driven process with clear deliverables

DMP Procurement Strategy

- 3-step collaborative procurement strategy:

- **Step 1:** Invitation to Qualify (ITQ)

Goal: to establish a pool of qualified vendors

- **Step 2:** Review and Refine Requirements (RRR)

Goal: to engage qualified vendors (Step 1) in developing a solution and to collaborate in drafting technical specs and a Statement of Work (SOW)

- **Step 3:** Request for Proposal (RFP) – Contract Award

Goal: to evaluate presented solution(s) and select a vendor from the pre-qualified pool (Step 1) whose solution offers the best value

Resultant Contract

- Contract's type: "as and when requested". Managed by Task Authorization (TA)
- Contract's period: 3 years, with options to extend the period of the agreement for up to seven years to be exercised in one-year increments at the discretion of the Agency.
- The contract includes multiple off-ramps aligned with the various decision points and phases of the project to be used at the discretion of the Agency without punitive financial consequences.

Benefits (Comparison)

Agile (used here)	Traditional (Potential)
Solution developed by the best experts in the field at no cost to the agency	Specs would have to be developed at the RFP phase at very high cost (using contractors)
Flexible contract with built-in off-ramps, milestone verifications and scalability	Difficult to build options after specs are set for the RFP
Highly competitive approach that resulted in the best possible solution	Technical specs developed at the RFP may not represent the best value

Lessons Learned

- Think about the “end-result” (solution) rather than “how to”
- Empower your team and streamline decision making process
- Collaborate regularly with stakeholders, including vendors, clients and legal counsel
- **Be flexible.** Don't discard ideas that may challenge the status quo
- Ensure transparency and fairness