



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