

## State Board of Administration of Florida

### Robotic Process Automation (RPA) ITN for Consulting Services Responses to Requests for Clarification

#	Question	Response
1	Approximately how many SBA employees are expected/need to be trained on the RPA software?	At this time, it is unknown how many total employees will be need to be trained on the to-be selected RPA software. However, the goal would be for the selected respondent to train SBA staff in a train-the-trainer capacity so that the SBA can be self-sufficient once the contract terminates. That being said, the SBA has identified a team of <15 people who will be a part of the Production Pilot.
2	Does SBA currently have adequate IT staff to assist with set-up and maintenance of the RPA software, or will the vendor be expected to completely provide this support.	The SBA has staff available to assist with the set-up and maintenance of the RPA software, however, the respondent will have primary responsibilities to ensure the software is setup and configured properly.
3	As part of the enablement strategy, will SBA be providing developers to be incorporated into a blended team approach?	The intent is to have SBA IT staff and others members of the dedicated RPA team shadow the respondent's development and functional team and be incorporated into the overall project team. SBA's goal is to be self-sufficient and not have to rely on vendor staff once the initiative is complete.
4	Is there an estimated/expected timeline that SBA expects for all RPA setup, training, and processes to be automated?	At this time, there is no estimated timeline. The timing will be dependent on the services/offerings of the respondents to complete the scope of services provided in the ITN.
5	If a Cloud RPA solution were to be considered to be implemented, is there a preferred technology partner for Cloud services by SBA?	No, there is no preferred Cloud provider at this time.
6	Is SBA expecting to use RPA with other automation platforms, such as OCR, BPM, or AI functionality?	Currently the SBA does not utilize OCR or other AI functionality, however, the SBA's Enterprise Content Management solution (ApplicationXtender & Kofax) has the ability to provide OCR capabilities. That being said, for the purposes of the production pilot implementation, BPM or other AI functionality will not be in scope. This however does not mean that the SBA will not seek to leverage OCR, BPM or AI functionality in the future and consideration should be given by the respondents that AI and OCR may be utilized in the future.

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7	Is there an expectation for vendors to bring multiple RPA partnerships to the table for evaluation, such as UIPath, Blue Prism, Pega, Automation Anywhere, etc.?	As stated in Section 3.01 - Experience; qualified vendors must have significant experience and demonstrated results in "assisting in the evaluation of software solutions that may be specific to any RPA proposed initiative." Additionally, the SBA is seeking a vendor to help in the selection of an RPA tool that will best meet the needs of the SBA.
8	Evaluation Criteria - is there a detailed scoring matrix that provides additional detail for the larger scoring components?	No additional scoring matrix will be utilized in the evaluation of responses.
9	Section 4.04 states, in part, "The selected Respondent shall adhere to the Project Management Institute (PMI) standards and shall provide an "as-needed" Project Manager ..." Specifically, please clarify what is intended with "as-needed" Project Manager?	A Project manager will increase the likelihood this project will be successful. The SBA will have dedicated Project Management staff assigned to this project; the expectation is that respondents will have an assigned PM as well to support this initiative. There is not an expectation that respondents PM will need to be full time.
10	Not only can Case.one provide management and strategic consulting services to support the establishment of a RPA governance structure as well as automation of various repetitive tasks utilizing RPA technologies and provide all the deliverables per the scope of the ITN, but it can also provide the software for the RPA solution through its .One Suite. Would the SBA consider a proposal for a software solution that meets the requirements of the ITN or will it only consider proposals for consulting services?	Respondents should provide a response to the Scope of Services as identified in the ITN. RPA software will not be considered or evaluated as a criterion of this procurement. Please reference Section 4.01 - "The purchase of the RPA software will be performed outside the scope of this ITN through a separate solicitation. The SBA recognizes that Respondents to this ITN may be resellers of their own or other vendor RPA software. In such instances, Respondents will not be prohibited from participating in the separate solicitation of RPA software."
11	If the response to question 1 is yes, and the SBA will consider a proposal for a software solution and not just consulting services, can it provide an estimated basis for pricing, such as number of users, clients, workflows, documents, cases etc.?	No, please see answer above.
12	3.0.2 – Point-4 : The Respondent must have been in business for a minimum of five years providing required	The SBA will not evaluate any response that does not meet the qualifications outlined in section 3.02 of the ITN.

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	services and/or related services Though we have been in quality engineering services for 30+ years, our RPA experience is 3+ years. Is this acceptable?	
13	3.0.2 – Point-5 : The Respondent must have provided similar consulting services for public pension funds, investment management providers or financial institutions We have worked with many banks and financial institutions including trusts and investment companies. Though we can quote, all of them are not referable. Is this acceptable?	Respondents need not provide references of all RPA clients. However, it is required that references are provided to the SBA to demonstrate respondent’s ability and experience required to deliver the proposed services. The SBA will not contact respondent’s references without providing notification to the respondent first.
14	What is the current RPA tool?	Please reference Section 4.01 - <i>"The purchase of the RPA software will be performed outside the scope of this ITN through a separate solicitation. The SBA recognizes that Respondents to this ITN may be resellers of their own or other vendor RPA software. In such instances, Respondents will not be prohibited from participating in the separate solicitation of RPA software."</i>
15	What is the level of technical knowledge does SBA employees have?	SBA staff is fully capable of developing, maintaining, and supporting an RPA implementation once training has been provided by the successful respondent.
16	The proposed solution may have a low/no code and hence would not require source control management. Hence this requirement may not be required. Please confirm	At this time, the SBA is not evaluating RPA Tools/Software.
17	Is this a billed role, if not what is the expected time per month by this PM?	Vendors are requested to provide a fixed-price cost for the scope of services provided in the ITN. A Project manager will increase the likelihood this project will be successful. The SBA will have dedicated Project Management staff assigned to this project; the expectation is that respondents will have an assigned PM as well to support this initiative. There is not an expectation that respondents PM will need to be full time.

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18	Is only a rate card for various levels/rates expected at this stage, as we do not have a firm scope to propose a fixed price at this point of time (both onsite /offshore?)	Vendors are requested to provide a fixed-price cost for the scope of services provided in the ITN. As part of this solicitation and any subsequent contract resulting from this solicitation, no off shore work is to be provided.
19	Should this be only onsite resources or is SBA open for onsite-offshore model. We can share sample profiles at this point of time - hope this is fine.	As part of this solicitation and any subsequent contract resulting from this solicitation, no offshore work is to be provided.
20	The list of deliverables in Section 4.03 Anticipated Deliverables does not contain a deliverable associated with "Pilot Bot(s) Implementation". Can you please clarify?	The Production Pilot is considered a deliverable as outline in section 4.02.
21	Does the SBA anticipate implementing technologies in addition to RPA (e.g., OCR, machine learning or system changes) for the RPA Production Pilot?	Currently the SBA does not utilize OCR or machine learning, however, the SBA's Enterprise Content Management solution (ApplicationXtender & Kofax) has the ability to provide OCR capabilities. That being said, for the purposes of the production pilot implementation, machine learning will not be in scope.
22	Does the SBA intend for the responders to include this information in the proposal AND include redacted version that omits the stated "trade secrets"? Just including information directly in the attachment might not be easy for reviewers to follow responses. Please advise	Please reference 6.09 Disclosure of Response Contents - A redacted version of the response is not required.
23	When would the RPA pilot likely start? Knowing the timelines would help us in resource planning.	At this time, there is no estimated timeline. The timing will be dependent on the services and offerings of the respondents to complete the scope of services provided in the ITN.
24	Can we assume that SBA will provide necessary test data (specific for the identified processes) for automation during the Pilot phase.	Yes.
25	We understand that the fee proposal needs to be on a fixed price basis. However we are unsure of the complexity, choice and the final number of processes at	Yes.

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	<p>this point in time. We can gauge the complexity based on our experience of buy side processes and submit a fee proposal based on that understanding. We can subsequently seek more clarity during the interview/presentation process, based on which we can adjust our fee proposal. Would this understanding be correct?</p>	
26	<p>Does SBA require the respondents to be on site during the entire length of the contract? Or can the work be done off site as well. This will affect our fee proposals. In addition, we assume that travel and expenses will be part of the fixed fee proposals. Would this understanding also be correct?</p>	<p>The SBA is comfortable with an on/off site resource model (no offshore) as it relates to project resources. The SBA will evaluate each respondent based the services being offered that will best meet the needs of the SBA and the scope of services outlined in the ITN. Any travel and expenses must be included in the vendors overall fixed fee proposal.</p>
End		