

Request for Proposals (RFP)

RFP # 2025-02-11-B IBM Watson Support

(A.C.C.E.S.) ACCESSIBLE COMMUNITY COUNSELLING AND EMPLOYMENT SERVICES (“ACCES”)

RFP Issued Date: February 11, 2025

RFP Closing Date: March 5, 2025 5:00 PM ET

RFP Objective

ACCES is requesting proposals from prospective proponents to qualify as a potential vendor for the provision of services to maintain and enhance a virtual attendant that is embedded on ACCES’ website and employed on ACCES’ Facebook Messenger app. The virtual attendant, or chatbot, is based on IBM Watson Assistant and Watson Discovery. Further details are described in Sections 2.1 and 2.2.

The goal of this RFP is to identify a potential vendor that meets the requirements of the service, which include quality of service and commercial conditions, such as price and payment terms.

The successful proponent will be invited to enter a Services Agreement for 12 months upon execution of the agreement. At ACCES’s discretion, the Service Agreement may be extended.

Table of Contents

SECTION 1 – ACCES OVERVIEW	2
SECTION 2 – DELIVERABLES AND EXPERIENCE	2
SECTION 3 – SUBMISSION INSTRUCTIONS	4
SECTION 4 – EVALUATION AND SELECTION	5
SECTION 5 – TERMS AND CONDITIONS	6

SECTION 1 - ACCES OVERVIEW

ACCES is a leader in connecting employers with qualified employees from diverse backgrounds. Over 56,000+ job seekers are served annually at seven locations across the Greater Toronto Area. As a not-for-profit corporation, ACCES receives funding from all levels of government, corporate sponsors, various supporters, and the United Way Greater Toronto.

For more information about ACCES, please visit www.accesemployment.ca.

SECTION 2 - DELIVERABLES AND EXPERIENCE

ACCES is requesting proposals from prospective proponents to qualify as a potential vendor for the provision of services to maintain and enhance a virtual attendant that is embedded on ACCES' website and employed on ACCES' Facebook Messenger app as described in Section 2.1. The successful proponent will be invited to enter a Services Agreement for 12 months upon execution of the agreement. At ACCES's discretion, the Services Agreement may be extended up to 3 years.

2.1. Project Overview

ACCES has a virtual attendant on its website that uses IBM Watson Assistant and IBM Watson Discovery technology to increase access to information and ACCES' programs. VERA (Virtual Employment and Resource Assistant) is a valuable gateway to our services, is available 24/7, reduces staff time spent on responding to routine inquiries, and allows users to self-register for events and log their interest in our programs for jobseekers or services for employers. We also deployed a smaller instance of VERA on our Facebook Messenger app to respond to the typical inquiries we receive through that channel. We continually make enhancements to VERA to improve its quality of service, and we are considering other use cases for this technology.

VERA is currently integrated with ACCES' primary stakeholder CRM (Salesforce) to provide a means of collecting client information and storing that data within the CRM, for event registration and/or contact backs. The vendor will be responsible for supporting VERA development and enhancements in collaboration with ACCES, who will be responsible for supporting complementary development and enhancements within Salesforce.

2.2. Scope of Work

- Monitor alerts and logs to ensure that all resources and service environments in the IBM Cloud are working properly (including development and production versions of Watson Assistant, Watson Discovery, etc.) Notify ACCES immediately, if there is an issue and provide options to restore functionality promptly.
- Support ACCES to maintain a subscription with IBM for these products.
- Ensure that all existing daily and monthly scripts have run correctly and if a script has not run, make prompt corrections in order to avoid data loss.
- Consult to understand our business objectives and requirements.

- Conceive and explain potential solutions to meet our objectives in a cost-effective manner, and which are sustainable and scalable.
- Provide effort estimates at the outset of the contract based on high level objectives provided by ACCES, in addition to providing estimates for ad hoc hours of support (e.g. time “bank” of hours).
- Hours that are unused per objective shall be carried forward or banked towards use on another project or initiative. ACCES may add additional ad hoc hours as needed.
- Develop approved solutions, according to agreed-upon timeframe, in a development VERA environment. Deploy approved change sets to a staging environment for ACCES to test. Make any additional changes, as directed, and deploy the approved changes to the production VERA environment.
- Coordinate weekly meetings (30 minutes) with the ACCES team to discuss progress on projects, and seek clarity on items, and provide a status on the hours consumed to date.
- Update a shared project board, which ACCES will provide, so that there is clear visibility on all upcoming, current and completed items.
- Provide guidance and share expert advice to ACCES on issues related to the IBM Cloud environment and any global changes that will or could impact our products.
- Proactively identify opportunities for improvement that would result in cost savings, time savings, or other efficiencies.
- Deliver training and documentation to ACCES’ Online Services team and/or other vendors, as needed so that we can perform some maintenance independently.
- Respond to major issues within 2 hours and minor items within 1 business day. Support shall be provided from Monday through Friday 9am – 6pm ET. Issue definitions are as follows:
 - o **Minor:** means other problems of a lesser severity than “critical” or “major” such as conditions that have little or no impairment on the function of the System (24hr response time)
 - o **Major:** means conditions that severely affect the primary functionality of the System and because of the business impact to ACCES, requires immediate corrective action, regardless of time of day or day of the week (2hr response time within 9am – 6pm ET)
- There may be times where we require off-hours support for planned deployments. These can be pre-arranged on a case-by-case basis.
- Vendor is expected to support integration with 3rd-party apps. While we do not expect vendor to support 3rd-party apps, we do expect them to work with 3rd-party apps vendors, as needed, to troubleshoot and resolve integration issues.

2.3. Skills and Qualifications

Demonstrable skills and qualifications shall include, but are not limited to:

- Proven experience in IBM Watson solution design, implementation, and support.
- Proven experience with the integration of IBM Watson with Salesforce, websites and social media apps.
- Proven capabilities and skills in project management, product management, and change management.

- Experience working with both clients and other vendors using SDLC/DevOps techniques with shared code repositories, so as not to introduce conflicts between versions and features both in development and production. Sensitive to the common constraints and challenges within the non-profit sector, and ability to deliver scalable solutions that fit within those constraints to maximize long-term value.

2.4. Demonstration of Experience

Please provide three recent examples and three recent references (*APPENDIX C – References*) demonstrating relevant experience. Experience with the non-profit, public sector, higher education, and/or employment organizations is an asset.

SECTION 3 – SUBMISSION INSTRUCTIONS

3.1. Key Dates

Description	Date and Time
RFP Issue Date	Tuesday, February 11, 2025
Proponents' Questions Deadline	Tuesday, February 18, 2025
Last Day for Addenda/Responses to Proponents' Questions	Monday, February 24, 2025
Proposals Submission Deadline	Wednesday, March 5, 2025 5:00 PM
Proposals Review Period	Thursday, March 6 – Monday, March 10, 2025
ACCES Selection Committee to Meet with Top Proponents	Tuesday, March 11 – Friday, March 14, 2025
Contract Award	Week of March 17, 2025

3.2. Instructions to Submit a Proposal

1. Proposals must be submitted by 5:00 pm EST via email to procurement@accesemployment.ca. Proposals submitted after the submission deadline will be rejected.

The subject line of the e-mail should contain the proponent's name followed by **RFP # 2025-02-11-B IBM Watson Support**

2. Proposals must include all completed forms listed below to be evaluated. Failure to provide all of these documents will result in disqualification.
 - Appendix A – RFP Cover Page
 - Appendix B – Conflict of Interest Statement
 - Appendix C – References
 - Appendix D – GST/HST Registration - Confirmation of Exemption (*if Applicable*)

- Appendix E – Bid Form in .xlsx format
- Appendix G – Technical Submission Requirements

Important Note: The maximum size of an email that ACCES can receive is 10 MB. The proposal may be separated into sections and sent in multiple emails if necessary.

3.3. Amendment or Withdrawal of Proposal

- Changes to the submitted proposal can be made no later than the submission deadline and to be marked “FINAL PROPOSAL” in the email subject line.
- At any time throughout the RFP process, a proponent may withdraw a submitted proposal by sending a notice of withdrawal to procurement@accesemployment.ca.

3.4. Subcontractors (if applicable)

- The proponent must list any subcontractors they will use for delivering the services requested in this RFP. Subcontractors will not be hired without ACCES’s prior written approval.

3.5. Proposal Receipt

- ACCES will send an email confirmation upon receipt of a proposal.

SECTION 4 – EVALUATION AND SELECTION

4.1. Evaluation Process

ACCES will evaluate the proposals based on the following criteria.

Criteria	Weight
Company Profile (or Individual’s Profile): <ul style="list-style-type: none"> • include the company’s legal name and location (state/province of incorporation); HST number; number of years in business; primary contact details; number of employees/current staffing; financial stability or total revenue previous fiscal year; core competencies, services and products. • where additional companies will be subcontracted, a company profile and company experience must be completed for each firm. 	15%
Company Experience: <ul style="list-style-type: none"> • describe the proponent’s experience in delivering the services <ul style="list-style-type: none"> o Implementing and supporting IBM Watson Assistant in the context of AI chatbots o Integrating Watson Assistant chatbots with public websites and Salesforce 	30%

<ul style="list-style-type: none"> o Implementing Watson Assistant solutions that have a demonstrable benefit and notable achievements in efficiency, cost savings, time savings, or otherwise 	
Key Project Resources: <ul style="list-style-type: none"> • include a description of their knowledge, skills and experience relevant to the delivery of services. 	15%
Technical Submission Requirements <ul style="list-style-type: none"> • Knowledge and experience with maintaining, extending and deploying virtual assistants, particularly those that run on IBM Watson Assistant and IBM Watson Discovery technology. • Experience with virtual assistants that integrate with Salesforce (i.e., form submissions via custom API). 	20%
Pricing: <ul style="list-style-type: none"> • complete Bid Form (<i>APPENDIX E</i>) and attach it to the proposal in .xlsx format. 	20%

4.2. Selection Process

- ACCES reserves the right to accept or reject any proposals.
- ACCES may request further information from the proponent or third parties to verify, clarify or supplement the information provided in the proposal. ACCES may reevaluate the proposal based on any such information.
- Top scoring proponents will be invited to interview with ACCES's Selection Committee.
- The evaluation process will consider a proposal that offers the best value and solution to ACCES, which may not necessarily be the lowest-priced proposal.
- The proponent that receives the highest score will be invited to enter into a contract with ACCES. If the highest-scored proponent declines the invitation to further participate, ACCES reserves the right to invite the next highest-scoring proponent to enter a contract instead.
- In the event of a tie score, ACCES's Selection Committee will consider all available tangible and intangible information, including but not limited to the information contained in the proposals, to arrive at the tiebreaking decision.
- ACCES will award the contract in writing.

SECTION 5 – TERMS AND CONDITIONS

5.1. Inquiries

- Proponents should e-mail all questions to: procurement@accesemployment.ca by the "Proponents' Questions Deadline" (*Section 3.1.*). ACCES will not respond to questions after this deadline.

- Inquiries deemed appropriate will be answered via addenda by the “Last Day for Addenda/Responses to Proponents’ Questions” (**Section 3.1.**). The addenda will be available online via the same bidding platform(s).

5.2. Blackout Period

- From the issuance of this RFP until the selected proponent executes an agreement, any contact regarding this RFP (other than as permitted in this RFP) with personnel employed by or contracted by ACCES is prohibited. During this time, proponents should not approach any ACCES personnel or contractor concerning this bidding, the contracting process, or their proposal.

5.3. Acknowledgment of Non-Binding Procurement Process

- This RFP is not intended to create any contractual or other legal obligations or duties whatsoever owed to any proponent or potential proponent by ACCES. Without restricting the generality of the foregoing, no contractual relations shall exist between ACCES and any proponent until the execution of an Agreement/Contract with that proponent.

5.4. Sample Services Agreement

- A sample Services Agreement (**APPENDIX F – Sample Services Agreement**) has been provided to outline ACCES’s standard terms and conditions, and it is not intended to be signed.

5.5. Insurance

- Even though ACCES does not identify any specific insurance requirements in this RFP, this shall not be construed as a waiver of the successful proponent’s responsibility to carry insurance that would be considered appropriate for a prudent person or business to carry while engaged in the activities and providing the Services, including liability insurance. For additional information on the insurance requirements, refer to (**APPENDIX F – Sample Services Agreement**).

5.6. Incidental Expenses, External Factors and Proposal Outcome:

- ACCES receives funding from various sources; therefore, all contracted services are subject to budget availability.
- ACCES as a non-profit organization under the **Broader Public Sector (BPS), Act 2010** is unable to reimburse the proponent for any incidental expenses such as food, hospitality, mileage, parking, photocopying, printing, etc.
- ACCES shall not be liable for any expenses incurred by any proponent, including the expenses associated with preparing the proposal.
- ACCES reserves the right to withdraw this RFP or terminate the resulting contract within the terms of the contract without penalty.

5.7. Conflict of Interest:

- Proponents may not have any personal or business interest that would present an actual, potential, or apparent conflict of interest with the performance of the contract to be awarded (*APPENDIX B – Conflict of Interest Statement*).

5.8. Publicity:

- Proponents should not use the award of a contract as part of any news release or commercial advertising without ACCES's prior written consent.

5.9. Disclosure of Confidential Information:

- Proposals should mark any confidential information. The confidentiality of such information will be maintained by ACCES, except as otherwise required by law or by order of a court or tribunal. Proponents are advised that their proposals will, as necessary, be disclosed on a confidential basis, to ACCES's staff to advise or assist with the RFP process, including the evaluation of proposals. If a proponent has any questions about the collection and use of personal information pursuant to this RFP, questions are to be submitted as per (*Section 5.1 "Inquiries"*).

5.10. Notification and Debriefing

- Once the contract has been awarded, the other proponents will be notified of the outcome of the RFP process via e-mail.
- Proponents may request a debriefing after receipt of notification of the outcome of the RFP process. All requests must be sent to procurement@accesemployment.ca and must be made within sixty (60) days of such notification.

5.11. Bid Dispute

- Any bid disputes should be submitted to procurement@accesemployment.ca within five (5) business days of receipt of the notice of award.
- The Selection Committee will review a bid dispute and take the appropriate remedial action, including, but not limited to, reinstating the proponent into the competition, or cancelling the RFP.
- The RFP award may be delayed because of a bid dispute.