

**RETURN BIDS TO:**  
**RETOURNER LES SOUMISSIONS À:**  
Bid Receiving - PWGSC / Réception des  
soumissions - TPSGC  
11 Laurier Street / 11, rue Laurier  
Place du Portage, Phase III  
Core 0A1 / Noyau 0A1  
Gatineau  
Québec  
K1A 0S5  
Bid Fax: (819) 997-9776

**LETTER OF INTEREST**  
**LETTRE D'INTÉRÊT**

Comments - Commentaires

Vendor/Firm Name and Address  
Raison sociale et adresse du  
fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution  
Procurement Strategies Division / Division des stratégies  
d'acquisition  
11 Laurier St. / 11, rue Laurier  
Place du Portage, 11C1  
Phase III, Tower C  
Gatineau  
Quebec  
K1A 0S5

|  |  |
|--|--|
| <b>Title - Sujet</b><br>TSPS 2013 Renewal  |  |
| <b>Solicitation No. - N° de l'invitation</b><br>E60ZN-13TSPS/A   | <b>Date</b><br>2013-02-22  |
| <b>Client Reference No. - N° de référence du client</b><br>E60ZN-13TSPS  | <b>GETS Ref. No. - N° de réf. de SEAG</b><br>PW-\$\$ZN-003-25481 |
| <b>File No. - N° de dossier</b><br>003zn.E60ZN-13TSPS  | <b>CCC No./N° CCC - FMS No./N° VME</b>                           |
| <b>Solicitation Closes - L'invitation prend fin</b><br><b>at - à 02:00 PM</b><br><b>on - le 2013-03-08</b>   |  |
| <b>Time Zone</b><br>Fuseau horaire<br>Eastern Daylight Saving<br>Time EDT  |  |
| <b>F.O.B. - F.A.B.</b><br><b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/> |  |
| <b>Address Enquiries to: - Adresser toutes questions à:</b><br>Michniewicz, Joe  | <b>Buyer Id - Id de l'acheteur</b><br>003zn                      |
| <b>Telephone No. - N° de téléphone</b><br>(819) 956-3233 ( )   | <b>FAX No. - N° de FAX</b><br>(819) 997-2229                     |
| <b>Destination - of Goods, Services, and Construction:</b><br><b>Destination - des biens, services et construction:</b>  |  |

Instructions: See Herein

Instructions: Voir aux présentes

|  |  |
|--|--|
| <b>Delivery Required - Livraison exigée</b>  | <b>Delivery Offered - Livraison proposée</b> |
| <b>Vendor/Firm Name and Address</b><br>Raison sociale et adresse du fournisseur/de l'entrepreneur  |  |
| <b>Telephone No. - N° de téléphone</b><br><b>Facsimile No. - N° de télécopieur</b>   |  |
| <b>Name and title of person authorized to sign on behalf of Vendor/Firm</b><br>(type or print)<br><b>Nom et titre de la personne autorisée à signer au nom du fournisseur/<br/>de l'entrepreneur ( taper ou écrire en caractères d'imprimerie)</b> |  |
| <b>Signature</b>   | <b>Date</b>                                  |

---

**REQUEST FOR INFORMATION REGARDING  
TASK AND SOLUTIONS PROFESIONAL SERVICES (TSPS) – TASKS  
BASED  
FOR  
PUBLIC WORKS AND GORVERNMENT SERVICES CANADA AND  
IDENTIFIED USERS  
TABLE OF CONTENTS**

|  |   |
|--|---|
| <b>A. 1 Background and Purpose of this Request for Information (RFI)</b> | 2 |
| <b>A. 2 Nature of Request for Information</b>                            | 3 |
| <b>A. 3 Nature and Format of Responses Requested</b>                     | 3 |
| <b>A. 4 Response Costs</b>   | 3 |
| <b>A. 5 Treatment of Responses</b>                                       | 3 |
| <b>A. 6 Contents of this RFI</b>   | 3 |
| <b>A. 7 Format of Responses</b>  | 4 |
| <b>A. 8 Enquiries</b>  | 4 |
| <b>A. 9 Submission of Responses</b>                                      | 4 |

Annex A: Request for Standing Offer and Request for Supply Arrangements (RFSO/RFSA) -  
draft

**REQUEST FOR INFORMATION REGARDING**

**TASK AND SOLUTIONS PROFESSIONAL SERVICES (TSPS)**

**FOR**

**PUBLIC WORKS AND GOVERNMENT SERVICES CANADA AND IDENTIFIED USERS**

**1. Background and Purpose of this Request for Information (RFI)**

The purpose of this RFI is to provide information to potential bidders to the changes planned to the TSPS Standing Offers and Supply Arrangements due to the Professional Services National Procurement Strategy. This RFI is also being published to consult the industry about the new categories added to TSPS, its definitions and resulting qualifications for expertise level of the consultants.

All potential bidders are provided with the following information in advance:

1. Provide a draft solicitation document open to industry comments;
2. General information about the next TSPS Renewal process for bidders;
3. Information concerning the migration of the Technical, Engineering and Maintenance Services (TEMS) (excluding the Telecommunications Services Stream) Supply Arrangement as a new stream of services into TSPS; and
4. Overview of the changes incorporated in this TSPS renewal solicitation.

It is anticipated that the next Task and Solutions Professional Services (TSPS) Request for Standing Offer (RFSO) Renewal and Request for Supply Arrangement (RFSA) Renewal will be published on the Government Electronic Tendering Service (GETS/MERX) with a tentative schedule as follows:

RFSO/SA Issued: March 2013  
RFSO/SA Closing: April / May 2013  
RFSO/SA Evaluations: May - August 2013  
RFSO/SA Issued: September / October 2013

A number of changes will affect the next TSPS renewal as a result of Public Works and Government Services Canada (PWGSC) Professional Services National Procurement Strategy. The details of the strategy can be found on MERX at <http://www.merx.com> under solicitation # E60ZH-110001/B. As also previously announced on the TSPS website, as a notice on : <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/avisnamsp-noticepsnps-eng.html>

## 2. Nature of Request for Information

This is not a bid solicitation. This RFI will not result in the award of any Standing Offers and Supply Arrangements. As a result, potential suppliers of any goods or services described in this RFI should not reserve stock or facilities, nor allocate resources, as a result of any information contained in this RFI. Nor will this RFI result in the creation of any source list. Therefore, whether or not any potential supplier responds to this RFI will not preclude that supplier from participating in any future procurement. Also, the procurement of any of the goods and services described in this RFI will not necessarily follow this RFI. This RFI is simply intended to solicit feedback from industry with respect to the matters described in this RFI.

## 3. Nature and Format of Responses Requested

Respondents are requested to provide their comments, concerns and, where applicable, alternative recommendations regarding how the requirements or objectives described in this RFI could be satisfied. Respondents are also invited to provide comments regarding the content, format and/or organization of any draft documents included in this RFI. Respondents should explain any assumptions they make in their responses.

## 4. Response Costs

Canada will not reimburse any respondent for expenses incurred in responding to this RFI.

## 5. Treatment of Responses

- (a) **Use of Responses:** Responses will not be formally evaluated. However, the responses received may be used by Canada to develop or modify procurement strategies or any draft documents contained in this RFI. Canada will review all responses received by the RFI closing date. Canada may, in its discretion, review responses received after the RFI closing date.
- (b) **Review Team:** A review team composed of representatives of the client (where applicable) and PWGSC will review the responses. Canada reserves the right to hire any independent consultant, or use any Government resources that it considers necessary to review any response. Not all members of the review team will necessarily review all responses.
- (c) **Confidentiality:** Respondents should mark any portions of their response that they consider proprietary or confidential. Canada will handle the responses in accordance with the *Access to Information Act*.
- (d) **Follow-up Activity:** Canada may, in its discretion, contact any respondents to follow up with additional questions or for clarification of any aspect of a response.

## 6. Contents of this RFI

- (a) This RFI contains a draft Request for Standing Offer and Request for Supply Arrangement (RFSO/SA). This document remains a work in progress and respondents should not assume that new clauses or requirements will not be added to any RFSO/RFSAs that is ultimately published by Canada. Nor should

respondents assume that none of the clauses or requirements will be deleted or revised. Comments regarding any aspect of the draft document are welcome.

## 7. Format of Responses

- (a) **Cover Page:** If the response includes multiple volumes, respondents are requested to indicate on the front cover page of each volume the title of the response, the solicitation number, the volume number and the full legal name of the respondent.
- (b) **Title Page:** The first page of each volume of the response, after the cover page, should be the title page, which should contain:
  - (i) the title of the respondent's response and the volume number;
  - (ii) the name and address of the respondent;
  - (iii) the name, address and telephone number of the respondent's contact;
  - (iv) the date; and
  - (v) the RFI number.
- (c) **Numbering System:** Respondents are requested to prepare their response using a numbering system corresponding to the one in this RFI. All references to descriptive material, technical manuals and brochures included as part of the response should be referenced accordingly.
- (d) **Number of Copies:** Canada requests that respondents submit one copies of their responses.

## 8. Enquiries

Because this is not a bid solicitation, Canada will not necessarily respond to enquiries in writing or by circulating answers to all potential suppliers. However, respondents with questions regarding this RFI may direct their enquiries in writing to:

Contracting Authorities: Josianne Courteau  
Sherrie Kingan;  
Kim Corriveau; and  
Joe Michniewicz  
E-mail Address: spts.tsp@tpsgc-pwgsc.gc.ca  
Facsimile: (819) 956-2229  
Address: 11 Laurier St,  
Place du Portage III, 11C1  
Gatineau, Quebec, K1A 0S5

## 9. Submission of Responses

- (a) **Time and Place for Submission of Responses:** Suppliers interested in providing a response should provide an answer by **email** to the Contracting Authority identified above by the time and date indicated on page 1 of this document.
- (b) **Responsibility for Timely Delivery:** Each respondent is solely responsible for ensuring its response is delivered on time to the correct location.
- (c) **Identification of Response:** Each respondent should ensure that its name and return address, the solicitation number and the closing date appear legibly on the outside of the response.



**BID SOLICITATION FOR  
TASK BASED  
SUPPLY ARRANGEMENTS AND STANDING OFFERS  
UNDER THE  
TASK and SOLUTIONS PROFESSIONAL SERVICES (TSPS)**

## TABLE OF CONTENTS

### COMPONENT I: REQUEST FOR BIDS

#### PART 1 - GENERAL INFORMATION

1. Introduction
2. Summary
3. Security Requirement
4. Debriefings
5. Key Terms

#### PART 2 - SUPPLIER INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions
2. Submission of Bids
3. Enquiries - Request for Bids
4. Applicable Laws

#### PART 3 - BID PREPARATION INSTRUCTIONS

1. Bid Preparation Instructions

#### PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures
2. Basis of Selection
3. Security Requirement
4. Financial Viability
5. Price Support

#### PART 5 - CERTIFICATIONS

1. Certifications to be submitted with the hard copy of the bid
2. Certifications Precedent to Issuance of a Standing Offer or Supply Arrangement

#### List of Attachments:

- Attachment A – Bidder Profile/Centralized Professional Services System (CPSS) Supplier Module – Enrollment**
- Attachment B – Supply Arrangement Technical Evaluation Criteria**
- Attachment C – Standing Offer Technical Evaluation Criteria**
- Attachment D – Standing Offer Financial Evaluation**
- Attachment E – Certifications/CPSS Supplier Module – Data Collection Component (DCC)**
- Attachment F – Technical Response Template/ CPSS Supplier Module – DCC**
- Attachment G – Financial Response Template/ CPSS Supplier Module – DCC**
- Attachment H – Standard Instructions – Competitive Requirements – Request for Standing Offers and Supply Arrangements**

## **COMPONENT II: SUPPLY ARRANGEMENT AND RESULTING CONTRACT CLAUSES**

### **PART 6A. SUPPLY ARRANGEMENT**

1. Arrangement
2. Security Requirement
3. Standard Clauses and Conditions
4. Term of Supply Arrangement
5. Authorities
6. Identified Users
7. Failure to Qualify
8. Priority of Documents
9. Certifications
10. Applicable Laws
11. Suspension or Cancellation by Canada
12. Aboriginal Business Certification (if applicable)
13. Delivery Requirements Outside CLCSAs
14. Environmental Considerations
15. Insurance requirement
16. Travel and Living
17. Regions and Metropolitan Areas

### **PART 6B. BID SOLICITATION**

1. Bid Solicitation Documents
2. Bid Solicitation Process

### **PART 6C. RESULTING CONTRACT CLAUSES**

1. General

#### **List of Annexes related to Component II:**

- Annex A SO/SA - Requirements for Services**
- Annex B SO/SA - TSPS Generic Security Requirements Check Lists (SRCLs)**
- Annex C SO/SA - Quarterly Usage Report Sample**
- Annex D SO/SA - Client Satisfaction Form**
- Annex E SA - Qualified Categories**
- Annex F SA – Insurance Requirements**

**Resulting Supply Arrangements will be issued in sequence under the E60ZN-13TSSA reference number.**

## **COMPONENT III - STANDING OFFER AND RESULTING CONTRACT CLAUSES**

### **PART 7A - STANDING OFFER**

1. Offer
2. Security Requirement
3. Standard Clauses and Conditions
4. Term of Standing Offer
5. Authorities
6. Identified Users
7. Call-up Procedures
8. Call-up Instrument
9. Limitation of Call-ups
10. Priority of Documents
11. Certifications
12. Applicable Laws
13. Confirmation of Qualification
14. Aboriginal Business Certification (if applicable)
15. Delivery Requirements Outside a CLCSA
16. Environmental Considerations
17. Travel and Living
18. Regions and Metropolitan Areas

### **PART 7B. RESULTING CONTRACT CLAUSES**

1. Requirement
2. Task Authorization
3. Standard Clauses and Conditions
4. Security Requirement
5. Term of Contract
6. Authorities
7. Payment
8. Invoicing Instructions
9. Certifications
10. Applicable Laws
11. Priority of Documents
12. SACC Manual Clauses
13. Reorganization of Identified User
14. Professional Services
15. Timely Problem Identification
16. Representations and Warranties
17. Transition Services at End of Contract Period
18. Identification Protocol Responsibilities

#### **List of Annexes related to Component III:**

**Annex A SO/SA - Requirements for Services**

**Annex B SO/SA - TSPS Generic Security Requirements Check Lists (SRCLs)**

**Annex C SO/SA - Quarterly Usage Report Sample**

**Annex D SO/SA - Client Satisfaction Form**

**Annex E SO - Qualified Categories and Rates**

**Annex F SO - Availability Confirmation Form**

**Resulting Standing Offers will be issued in sequence under the E60ZN-13TSPS reference number.**

## **PART 1 - GENERAL INFORMATION**

### **1. Introduction**

This bid solicitation has three components: a Request for Bids, a Supply Arrangement and a Standing Offer.

### **COMPONENT I – REQUEST FOR BIDS**

The Request for Bids is divided into five parts plus attachments as follows:

Part 1, General Information: provides a general description of the requirement;

Part 2, Bidder Instructions: provides the instructions applicable to the clauses and conditions of the Request for Bids;

Part 3, Bid Preparation Instructions: provides suppliers with instructions on how to prepare their bid to address the evaluation criteria specified;

Part 4, Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria which must be addressed in the bid, the security requirement, and the basis of selection; and

Part 5, Certifications: includes the certifications to be provided;

The Attachments to Component 1 include:

- Attachment A – Bidder Profile/Centralized Professional Services System (CPSS) Supplier Module – Enrollment
- Attachment B – Supply Arrangement Technical Evaluation Criteria
- Attachment C – Standing Offer Technical Evaluation
- Attachment D – Standing Offer Financial Evaluation
- Attachment E – Certifications/CPSS Supplier Module – Data Collection Component (DCC): Certifications
- Attachment F – Technical Response Template/ CPSS Supplier Module – DCC
- Attachment G – Financial Response Template/ CPSS Supplier Module – DCC
- Attachment H – Standard Instructions – Competitive Requirements – Request for Standing Offers and Supply Arrangements

### **COMPONENT II - SUPPLY ARRANGEMENT AND RESULTING CONTRACT CLAUSES**

Part 6: The Supply Arrangement is divided into three parts, plus annexes, as follows:

6A, Supply Arrangement: includes the Supply Arrangement (SA) with the applicable clauses and conditions;

6B, Bid Solicitation: includes the instructions for the bid solicitation process within the scope of the SA;

6C, Model Resulting Contract Clauses: includes general information for the conditions which will apply to any contract entered into pursuant to the SA.

The Annexes to Part 6 include:

Annex A SO/SA - Requirements for Services  
Annex B SO/SA - TSPS Generic Security Requirements Check Lists (SRCLs)  
Annex C SOSA - Quarterly Usage Report Sample  
Annex D SO/SA - Client Satisfaction Form  
Annex E SA – Qualified Categories  
Annex F SA – Insurance Requirements

### **COMPONENT III – STANDING OFFER AND RESULTING CONTRACT CLAUSES**

Part 7: The Standing Offer is divided into two parts, plus annexes, as follows:

7A Standing Offer: includes the Standing Offer from the Supplier and the applicable clauses and conditions;

7B Resulting Contract Clauses: includes the clauses and conditions which will apply to any contract resulting from a call-up made pursuant to the Standing Offer.

The Annexes to Part 7 include:

Annex A SO/SA- Requirements for Services  
Annex B SO/SA - TSPS Generic Security Requirements Check Lists (SRCLs)  
Annex C SOSA - Quarterly Usage Report Sample  
Annex D SOSA - Client Satisfaction Form  
Annex E SO - Qualified Categories and Rates  
Annex F SO – Availability Confirmation Form

## **2. Summary**

- 2.1 This solicitation is a Request for Bids to satisfy Canada's requirement for the provision of Task Based Professional Services to locations throughout Canada, excluding any locations in areas subject to any of the Comprehensive Land Claims Agreements.

Each bid may result in a Supply Arrangement (SA), a Standing Offer (SO), or both. All suppliers capable of meeting the requirements of this bid solicitation are invited to submit a bid for the Services in an arrangement for a Supply Arrangement or an offer for a Standing Offer, or both.

- 2.2 Existing SO and/or SA Holders

This document also allows Existing SO and/or SA Holders to provide their new rates. It also allows Existing SO and/or SA Holders to submit bids to enable them to qualify for those Regions, Metropolitan Areas and Categories for which they currently do not have a SO and/or SA.

Existing SO and/or SA Holders are not required to re-qualify for any Consultant Categories for which they already have a SO or SA although they must otherwise comply with the requirements of the renewal solicitation.

**As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.**

### 2.3 Streams

TSPS includes the following streams of services:

- Stream 1: Human Resource Services;
- Stream 2: Business Services / Change Management Services;
- Stream 3: Project Management Services; and
- Stream 4: Real Property Project Management Services.
- Stream 5: Technical Engineering and Maintenance Services (TEMS)

Each Stream is further subdivided into single "Categories".

Bids will be evaluated on a Category and Stream basis. It is not necessary to bid for all Streams or for all Categories in a Stream to be issued an instrument. Therefore, if a bidder wishes to submit a bid for services in only one specific Stream, it may do so; however, if a minimum response is required to obtain a Category or a Stream, then that minimum response must be provided in the bid.

**Instruments resulting from this Request for Bids will not be used for staffing or for Temporary Help Services (THS) requirements.**

Until such time as PS Online is replaced by ProServices, the framework established under this Request for Bids will allow Identified Users to contract for some services below the Professional Services (PS) On-line maximum dollar threshold, Identified Users are encouraged to utilize the PS On-line application for requirements valued at or below its dollar value limit. (PS On-line URL: <http://www.tpsgc-pwgsc.gc.ca/app-acq/sp-ps/index-eng.html>)

After issuance of the ProServices Supply Arrangements, all SA requirements estimated below the NAFTA threshold for Services must be conducted using ProServices. Currently, the NAFTA threshold for Services is \$78,500 and is revised periodically. Refer to section 1.25.5 of the PWGSC Supply Manual for further information (<https://buyandsell.gc.ca/policy-and-guidelines/supply-manual/section/1/25/5>).

### 2.4 The Period of the Instruments

The Standing Offer and the Supply Arrangement will remain valid for a period of 18 months or until such time as Canada no longer considers them to be advantageous to use them. The period for awarding Call-ups against the Standing offer and contracts under the Supply Arrangement begins on the start date of the Standing Offer and the Supply Arrangement.

### 2.5 Identified Users

Any resulting instruments may be used by any government department or Crown Corporation as described in the *Financial Administration Act* (as amended from time to time) or any other party for which the Department of Public Works and Government Services may be authorized to act from time to time under section 16 of the Department of Public Works and Government Services Act (each "Identified User").

## 2.6 Bid Solicitation

***As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.***

It is intended that this bid solicitation follow the guidelines set out by PWGSC's Professional Services National Procurement Strategy; however those guidelines are not incorporated into this document. The bid solicitation documents contain all the requirements relating to this bid solicitation. Any other information or documentation provided to or obtained by a bidder from any source is not relevant.

In as much as possible, PWGSC will issue a bid solicitation intended to replace the Supply Arrangements and Standing Offers for the Services on an annual basis, although PWGSC reserves the right to choose to proceed with a different procurement vehicle for the requirement if it considers such action appropriate. Each such re-competition (a "renewal bid solicitation") requires all bidders, including those who may have received instruments under the previous solicitation, to submit a bid in response to the renewal bid solicitation in order to continue to provide services under its resulting Standing Offers and Supply Arrangements. The terms and conditions of each renewal bid solicitation may add, modify or remove Categories/Streams, and may otherwise modify the requirements of the previous bid solicitation. As such, each renewal bid solicitation stands alone, separate and apart from any previous bid solicitation. While some aspects of a bidder's bid may incorporate by reference information already in the possession of Canada, all the requirements of a renewal bid solicitation must be met by each bidder by the renewal bid solicitation closing date.

Bidders must submit offers for a Standing Offer in accordance with the terms of each renewal solicitation and no such offers may be submitted after the renewal closing date until the next renewal solicitation is solicited. However, Bidders may submit an arrangement for a Supply Arrangement at any time by responding to the most recent refresh terms and conditions posted on GETS.

Canada may issue supply arrangements to bidders who qualify throughout the entire period of the Supply Arrangement. Evaluations of such arrangements will be processed on a quarterly basis, with targeted schedules identifying the closing dates for each quarterly evaluation cycle.

Refer to Component II, Part 4.2 for more information on the Supply Arrangement refresh schedule.

## 2.7 Trade Agreements

The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO\_AGP), the North American Free Trade Agreement (NAFTA), the Agreement on Internal Trade (AIT), the Canada – Chile Free Trade Agreement (CCFTA), the Canada – Peru Free Trade Agreement (CPFTA), the Canada – Colombia Free Trade Agreement (CCoIFTA), and the Canada – Panama Free Trade Agreement (CPanFTA), if it is in force.

## 2.8 Designation as Set-Aside

Part of this procurement may be designated by one or more Identified Users as set-aside under the federal government's Procurement Strategy for Aboriginal Business (PSAB). In these specific cases, (i) the procurement is set aside from the international trade agreements under the provision each has for set-asides for small and minority businesses, and (ii) as per Article 1802 of the AIT, the AIT does not apply.

In order to be considered as an Aboriginal Business under the PSAB, the Bidder must complete the Aboriginal Business certification contained in the Data Collection Component of the CPSS.

#### 2.9 Comprehensive Land Claim Agreements

The resulting SAs and SOs are not to be used for deliveries within a Comprehensive Land Claims Settlement Area (CLCSA). All requirements for delivery within a CLCSA are to be submitted to the Department of Public Works and Government Services for individual processing.

### 3. Security Requirement

There is a security requirement associated with the requirement of the Standing Offer and Supply Arrangement. For additional information, see Part 4 - Evaluation Procedures and Basis of Selection, Part 6A - Supply Arrangement and Part 7A – Standing Offer.

### 4. Debriefings

After issuance of an instrument, Bidders may request a debriefing on the results of the Request for Bids process. Suppliers should make the request to the Standing Offer or Supply Arrangement Authority within 15 working days of receipt of the results of the Request for Bids process. The debriefings may be in writing, by telephone or in person.

***As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.***

### 5. Key Terms

- 5.1 TASK BASED PROFESSIONAL SERVICES:** are services related to a particular activity or initiative that are required to address a specific professional services need, which are usually associated with a specified set of responsibilities. Professional services are purchased typically on a per diem basis and are related to a particular activity or initiative. Tasks can be for short or long periods of time and can be subsets of a larger project. Deliverables are well defined, often with specific timelines. Identified Users are looking for a consultant with direct or specialized knowledge and sufficient expertise to accomplish the work.
- 5.2 NEW BIDDER** refers to a bidder that was not issued a SO under TSPS refresh solicitation E60ZN-110001/A and/or a bidder that was not issued a SA under TSPS refresh solicitation E60ZN-090002/B.
- 5.3 EXISTING OR CURRENT SO and/or SA HOLDER** refers to a bidder that was issued a SO and/or SA under TSPS solicitation E60ZN-110001/A or TSPS solicitation E60ZN-090002/B.
- 5.4 Centralized Professional Services System or CPSS:** web-based system created as part of PWGSC's Professional Services National Procurement Strategy to support a single portal for professional services. It contains information on methods of supply, which will include TSPS, and reflects standardized business rules. CPSS is comprised of a **Supplier Module**, a **Client Module** and a **Maintenance Module**. The Client Module is used by Government of Canada personnel to process procurement functions. The Maintenance Module is used to administer CPSS and the methods of supply it contains. The Supplier Module allows a supplier through a Main Supplier Contact (as defined below) to:

- (i) create and manage **Contacts** (Contacts are supplier personnel who, using credentials received in response to actions by the Main Supplier Contact are able to input data for the supplier into the Data Collection Component, and view data displayed in the Client Module for use by Government of Canada personnel);
- (ii) input and submit data as part of a solicitation process;
- (iii) track the progress/status of data input against bid solicitation(s) and retrieve the data for use in other solicitations;
- (iv) modify an arrangement as permitted by a solicitation's terms; and
- (v) view information pertaining to that supplier and edit certain elements of that supplier's profile.

**5.5 Data Collection Component or DCC:** a part of the CPSS Supplier Module that replaces the concept of "Response Templates" that have been used in other professional services solicitations for TSPS. The DCC will display information on methods of supply in a "dashboard" format, providing both information that has been submitted by a supplier and information on upcoming and closed solicitations for professional services.

Each supplier must enroll and identify a **Main Supplier Contact or MSC**. The MSC will receive credentials that enable the MSC to access the Supplier Module, as defined in Article 5.4 above. Enrollment is conducted on-line and can be initiated by a supplier at any time, with a typical response time of minutes to receive credentials, where all the necessary information is received by Canada. Instructions for enrollment in the CPSS Supplier Module and other support on the use of the DCC are available at:

<http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spc-cps-eng.html>

When participating in any solicitation process that involves the use of the DCC, suppliers are responsible for the input of accurate data. Suppliers must also safeguard the credentials released to the MSC and supplier's Contacts that enable access to the Supplier Module. Canada will not delay or cancel any solicitation or Call-up process due to a supplier's inability to access, modify or validate such credentials, or because of any claim that such credentials were used without proper authorization.

While suppliers normally have the option to submit their tender to Canada in writing directly, by mail or by other means, due to the unique nature of this solicitation, certain aspects of a bidder's bid must be submitted only by electronic transmission, (see Part 3 - Bid Preparation Instructions).

Therefore, in order to respond to this bid solicitation, a supplier must enroll in the CPSS Supplier Module and input data in the DCC, as described above. Should a supplier have questions or concerns regarding enrollment or any other aspect of the electronic transmission of data through the DCC, the supplier is encouraged to submit these questions or concerns as early as possible in the bid solicitation period, in accordance with the Article titled "Enquiries - Request for Bids".

## **PART 2 - SUPPLIER INSTRUCTIONS**

### **1. Standard Instructions, Clauses and Conditions**

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the [Standard Acquisition Clauses and Conditions](http://ccua-sacc.tpsgc-pwgsc.gc.ca/pub/acho-eng.jsp) Manual (<http://ccua-sacc.tpsgc-pwgsc.gc.ca/pub/acho-eng.jsp>) issued by Public Works and Government Services Canada.

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation (including its attachments) and accept the clauses and conditions of the Standing Offer, Supply Arrangement and resulting contract(s).

#### **1.1 Standard Instructions**

Standard Instructions - Competitive Requirements - Request for Supply Arrangements and Standing Offers, included at Attachment H, form part of this bid solicitation.

#### **1.2 SACC MANUAL CLAUSES**

M0019T(2007-05-25) Firm Price and/or Rates

M0222T(2010-01-11) Evaluation of Price

#### **1.3 BID PARTICIPATION**

Although this solicitation may result in a Bidder receiving a Standing Offer, a Supply Arrangement, or both, a Bidder's bid must contain its response to all the requirements of this bid solicitation. The bid may include an offer for an Standing Offer and/or an arrangement for a Supply Arrangement in some or all Tiers, Regions, Metropolitan areas, Streams and/or Categories; however, a Bidder may not submit a second bid for the same Tier, Region, Metropolitan areas, Streams and/or Categories.

One legal entity may participate in the submission of:

- (i) one bid from the legal entity alone, or
- (ii) one bid from the legal entity and one bid submitted in a joint venture, or
- (iii) two bids submitted in joint venture.

More than two bids generated from the same legal entity is not permitted in response to this solicitation. If a legal entity participates in more than two bids, Canada will choose in its discretion which two bids to consider. If a legal entity chooses to participate in two bids, each bid must be a physically separate document, clearly marked as a separate bid. Each bid will be evaluated independently without regard to other bids submitted and, therefore, every bid submitted must be complete.

#### **1.4 Set-aside for Aboriginal Business**

- a) This procurement in whole or in part, may be set aside as set aside for Aboriginal business under the federal government's Set-aside Program for Aboriginal Business. In order to be considered as an Aboriginal Business, Suppliers must complete and sign the certification entitled "Set Aside for Aboriginal Business " at Part 5 – Certifications.
- b) By executing the certification, the Supplier warrants that it is an Aboriginal business as defined in the Set-aside Program for Aboriginal Business.

***As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.***

## **2. Submission of Bids**

While Bidders normally have the option to submit their bid to Canada in writing directly, by mail, or by other means, due to the unique nature of this solicitation, bids must be submitted only in the following manner:

- (i) physically to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated on page one of the bid solicitation for the elements of the bid that must or may be submitted in Print; and
- (ii) electronically through the Data Collection Component of CPSS by the date and time as indicated on page one of the bid solicitation for the bid elements that must or may be submitted by electronic transmission.

Refer to the "Bid Submission Grid" in Part 3 for detailed bid submission information.

## **3. Enquiries - Request for Bids**

All enquiries must be submitted in writing to the Standing Offer/Supply Arrangement Authority no later than 15 calendar days before the bid solicitation closing date. Enquiries received after that time may not be answered.

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the questions or may request that Bidders do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

## **4. Applicable Laws**

A Standing Offer and any contract resulting from the Standing Offer, as well as a Supply Arrangement and any contract awarded under it, must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of the arrangement, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice in Attachment A - Bidder Profile. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidder.

## PART 3 - BID PREPARATION INSTRUCTIONS

### 1. Bid Preparation Instructions

***As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.***

Canada requires that suppliers provide their bid in hard copy and as electronic submission as identified in the Bid Submission Grid below.

**Section I Technical Bid:** To the PWGSC Bid Receiving Unit, one Print copy of the Technical Bid as detailed in Attachment B and Attachment C, except where identified in the Bid Submission Grid (below) as being required to be submitted through the Data Collection Component (DCC) of the Supplier's Module of the CPSS.

**Section II Financial Bid:** Through the DCC of the Supplier's Module of the CPSS, the entire Financial Bid for the RFSO. Only information submitted through the DCC will be considered for the Financial Bid.

**Section III Certifications:** For the Certifications as detailed in Component I, Part 5 and Attachment E, a Print copy of the Certification or submission through the DCC, as specified in the Bid Submission Grid at article 1.3 of Part 3 below.

Where information is required to be submitted in both Print copy and via the DCC, if there is a discrepancy between information received via the Data Collection Component and the Print (hard) copy, the Print copy will take precedence.

#### 1.1 Format Instructions

Canada requests that suppliers follow the format instructions described below in the preparation of the bid.

- (a) use 8.5 x 11 inch (216 mm x 279 mm) paper or 8.5 x 14 inch (216mm x 356 mm) paper;
- (b) use a numbering system that corresponds to that of the Request for Bid.

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process [Policy on Green Procurement](http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, suppliers are encouraged to:

- 1) use paper containing fibre certified as originating from a sustainably-managed forest and/or containing minimum 30% recycled content; and
- 2) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duo tangs or binders.

***As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.***

### **1.2 Data Collection Component of the Supplier's Module of the CPSS**

Bidders must submit their financial bids and most of their technical bids as specified in this Part 3 through the Data Collection Component of the Supplier's Module of CPSS.

***Prospective bidders may enroll in CPSS at anytime. Steps 3 to 5 below may only be completed once the official RFSO/SA has been advertised on MERX (estimated to be March 2013).***

To access the Data Collection Component:

1. Access the following CPSS link: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spc-cps-eng.html>
2. Enroll or login to the system. Bidders must contact CPSS directly for enrollment questions or assistance.
3. Access this solicitation's Data Collection Component through the "Dashboard"
4. Enter all the required data into the Data Collection Component
5. Print the required parts of the Data Collection Component and submit with the hard copy of the bid by the closing date, time, and location indicated on page one (1) of this solicitation. The Data Collection Component allows bidders to re-submit the electronic copy of the bid, replacing that bidder's previous electronic copy of the bid up until the closing date and time of this bid solicitation.

***As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.***

### **1.3 Bid Submission grid**

The purpose of the following grid is to assist Bidders with their bid preparation and bid submission. As the status and circumstances of each bidder is unique, it is the responsibility of each bidder to read all documents related to this solicitation, and to ensure that all mandatory criteria, Certifications, and elements required for bid validity are met in their bid submission. Where in the Submission Grid the symbol "&" is used, it means that the Bidder must submit the information requested through both methods.

**The following terms are used below:**

**TEMS:** refers to all Streams of the TEMS SA, excluding the Telecommunications Stream.

**DCC:** indicates that the Bidder must input information, as applicable, into the "Data Collection Component: Suppliers' Module of CPSS".

**Print:** Indicates that Bidder must print and sign the certification and submit it with the hard copy of the bid to the Bid Receiving Unit by the submission due date.

**ADD:** Indicates that additional documentation is required to be submitted with the hard copy of the Bid to the Bid Receiving Unit no later than the bid closing date.

**As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.**

**BID SUBMISSION GRID**

| Column A                                   | Column B  | Column C  | Column D  | Column E   | Column F   | Column G   |
|--|---|---|---|--|--|--|
|  | <b>New TSPS Bidder</b><br>(Bidder is not a current TSPS Holder) | <b>Existing TSPS Holder:</b><br><br>The Bidder is <b>NOT</b> changing the Technical Offer already on file from the previous TSPS Solicitation | <b>Existing TSPS Holder:</b><br><br>The Bidder <b>IS</b> applying for additional Tier(s) and/or, Category(ies), or is otherwise modifying their Technical Offer already on file from the previous TSPS Solicitation | <b>TEMS Holders</b> (The Bidder is <b>NOT</b> a current TSPS Holder) | <b>Current TSPS Holder who is also a TEMS Holder:</b><br><br>The Bidder is <b>NOT</b> applying for additional Tier(s) and/or Category(ies), etc. | <b>Current TSPS Holder who is also a TEMS Holder:</b><br>The Bidder <b>IS</b> applying for additional Tier(s) and/or, Category(ies. ), or is otherwise modifying their Technical Offer already on file from the previous TSPS Solicitation |
| <b>Section I Technical Bid</b>             |   |   |   |  |  |  |
| Region & Metropolitan Area selection       | DCC   | DCC   | DCC   | DCC  | DCC  | DCC  |
| Mandatory M.1 – all streams                | DCC & ADD   | Grandfather Cert.   | Grandfather Cert.   | DCC  | Grandfather Cert.  | Grandfather Cert.  |
| Mandatory M.2 – all streams                | DCC & ADD   | Grandfather Cert. & DCC   | Grandfather Cert. & DCC & ADD   | DCC  | Grandfather Cert. & DCC  | Grandfather Cert. & DCC & ADD  |
| Mandatory M.3 – all streams                | DCC & ADD   | Grandfather Cert. & DCC   | Grandfather Cert. & DCC & ADD   | DCC  | Grandfather Cert. & DCC  | Grandfather Cert. & DCC & ADD  |
| Migration of Applicable TEMS               | No  | No  | No  | Yes  | Yes  | Yes  |
| <b>Section II Financial Bid</b>            |   |   |   |  |  |  |
| Financial Offer (*for the RFSO only)       | DCC   | DCC   | DCC   | DCC  | DCC  | DCC  |
| <b>Section III Certifications</b>          |   |   |   |  |  |  |
| Bidder's Statement                         | DCC & Print (Attachment E)                                      | DCC & Print (Attachment E)  | DCC & Print (Attachment E)  | DCC & Print (Attachment E)   | DCC & Print (Attachment E)   | DCC & Print (Attachment E)   |
| Grandfather Certification                  | N/A   | DCC & Print (Attachment E)  | DCC & Print (Attachment E)  | N/A  | DCC & Print (Attachment E)   | DCC & Print (Attachment E)   |
| FCP EE Certification                       | DCC   | Grandfather Cert.   | Grandfather Cert. or DCC  | DCC  | Grandfather Cert.  | Grandfather Cert. or DCC   |
| Work Force Reduction Program Certification | DCC   | Grandfather Cert.   | Grandfather Cert. or DCC  | DCC  | Grandfather Cert.  | Grandfather Cert. or DCC   |
| Former Public Servant Certification        | DCC   | Grandfather Cert.   | Grandfather Cert. or DCC  | DCC  | Grandfather Cert.  | Grandfather Cert. or DCC   |
| Aboriginal Business Certification          | DCC   | Grandfather Cert.   | Grandfather Cert. or DCC  | DCC  | Grandfather Cert.  | Grandfather Cert. or DCC   |
| Code of Conduct Certification              | DCC   | DCC   | DCC   | DCC  | DCC  | DCC  |

**1.4 Section I: Technical Bid**

Bidders must identify in their bid the Categories, Stream(s), Regions, Metropolitan area(s) and Tier(s) for which they wish to be considered.

In the technical Bid, suppliers should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work. The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In

order to facilitate the evaluation of the bid Canada requests that Bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, Bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

This bid solicitation will award offers and arrangements based upon an evaluation that does not assess the personnel that may be provided by the bidder after the award of a Standing Offer or Supply Arrangement. As it does not require the submission of individual resources, resumes are not requested and should not be submitted with a Bidder's bid.

#### **1.5 Section II: Financial Bid**

***As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.***

A financial bid must be submitted for a bid containing an offer for a Standing Offer.

Bidders must submit their financial bid through the Data Collection Component, in accordance with this solicitation. The total amount of Goods and Services Tax or Harmonized Sales Tax must be shown separately, if applicable. Unless otherwise indicated, Bidders must include a firm, all-inclusive rate quoted in Canadian dollars in each cell requiring an entry in the Data Collection Component.

A financial bid must be completed for each Region and Metropolitan Area (if applicable) for which the Bidder is proposing to offer a Category.

#### **1.6 Section III: Certifications**

Bidders must provide all of the certifications required under Part 5.

## **PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION**

### **1. Evaluation Procedures**

- (a) Bids will be assessed in accordance with the entire requirement of the Request for Bids including the technical and RFSO financial evaluation criteria. There are several steps in the evaluation methodology, which are described below. Even though the evaluation and selection will be conducted in steps, the fact that Canada has proceeded to a later step does not mean that Canada has conclusively determined that the Bidder has successfully passed all the previous steps. Canada may conduct steps of the evaluation in parallel.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids. Canada may hire any independent consultant, or use any Government resources, to evaluate any bid. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.
- (c) If Canada seeks clarification or verification from the Bidder about its bid, the Bidder will have two working days (or a longer period if specified in writing by the Offer/Arrangement Authority) to provide the necessary information to Canada. Failure to meet this deadline will result in the bid or a part thereof being declared non-responsive, unless the Offer/Arrangement Authority grants an extension in his or her sole discretion.
- (d) As a result of PWGSC's Professional Services National Procurement Strategy, the TEMS SA (excluding Telecommunications Stream) scheduled to be sunset once the evaluations of this renewal bid solicitation have been completed. Information concerning this migration is specified in Attachment B and Attachment C of this bid solicitation

#### **1.1. Technical Evaluation**

The technical evaluation criteria for the provision of the Services under the Standing Offer are included in Attachment C – Standing Offer Technical Evaluation Criteria.

The technical evaluation criteria for the provision of the Services under the Supply Arrangement are included in Attachment B – Supply Arrangement Technical Evaluation Criteria.

#### **1.2 Financial Evaluation**

The financial evaluation criteria for the provision of the Services under the Standing Offer are included in Attachment D – Standing Offer Financial Evaluation. No financial evaluation of bids is required to be issued a Supply Arrangement.

***As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.***

### **2. Basis of Selection**

All elements of the bid solicitation that are mandatory requirements are identified specifically with the words “must” or “mandatory”. Bids that do not comply with each and every mandatory requirement applicable to the offer and/or arrangement will be considered non-responsive for that offer and/or arrangement. The evaluation steps are as follows:

#### **(a) Step 1 – Technical Evaluation:**

PWGSC will verify that a bid includes all applicable certifications and other documentation requested under the solicitation and that such information is complete. Each bid will be reviewed

to determine if it contains an arrangement for a Supply Arrangement that meets the mandatory requirements of Attachment B - Supply Arrangement Technical Evaluation Criteria and to determine whether it contains an offer for a Standing Offer that meets the mandatory requirements set out in Attachment C - Standing Offer Technical Evaluation Criteria

Within each bid, an arrangement must comply with the requirements of the bid solicitation and meet all mandatory requirements of Attachment B to be declared responsive to the requirement for a Supply Arrangement. Arrangements that do not meet the mandatory requirements will be considered non-responsive and will be given no further consideration. Suppliers who meet the Mandatory Criteria of Tier 2 will be considered to have met the Mandatory Criteria of Tier 1 if they have indicated in the DCC whether they wish to provide for both tiers.

Within each bid, an offer must comply with the requirements of the bid solicitation and meet all mandatory requirements of Attachment C to be declared responsive to the requirement for a Standing Offer. Offers that do not meet the mandatory requirements will be deemed non-responsive and will be given no further consideration.

**(b) Step 2 – Evaluation of Financial (Standing Offer Only):**

Each offer meeting the mandatory requirements for the Standing Offer technical evaluation will be evaluated in accordance with the financial requirements identified in Attachment D – Standing Offer Financial Evaluation.

**(c) Step 3 – Selection and Issuance of Supply Arrangements and Standing Offers**

The Supplier Selection will be conducted per Tier, Region and Metropolitan Area, for each specific Category and Level of Expertise.

Each technically responsive arrangement will be recommended for the issuance of a Supply Arrangement on the terms stated in Component II.

Each technically and financially responsive offer will be recommended for issuance of a Standing Offer on the terms stated in Component III.

Where an Aboriginal Bidder qualifies for both an Aboriginal and Non-Aboriginal Standing Offer, only one Standing Offer will be awarded.

Where an Aboriginal Bidder qualifies for both an Aboriginal and Non-Aboriginal Supply Arrangement, only one Supply Arrangement will be awarded

***As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.***

**3. Security Requirement**

- 3.1 Before issuance of a Standing Offer or a Supply Arrangement the Bidder must hold a valid organization security clearance as indicated in Part 6A – Supply Arrangement or Part 7A – Standing Offer, as applicable.
- 3.2 Canada will not delay the issuance of any Standing Offer or Supply Arrangement to allow Bidders to obtain the required clearance. However in respect of a Supply Arrangement, should a Bidder receive its required clearance while all other requirements of the bid solicitation have been met and its bid is still valid, Canada will consider awarding a Supply Arrangement to that Bidder.

- 3.3 Bidders who have not yet received their DOS clearance from CISD by the date that the Offer/Arrangement Authority has issued any Standing Offer as a result of this solicitation will be considered non-responsive to this bid solicitation's requirements for the issuance of a Standing Offer.
- 3.4 Bidders may request that the Standing Offer or Supply Arrangement Authority consider security sponsorship of their candidacy to upgrade it to the next security level that is above the Bidder's current security level or to seek initial DOS clearance. Such sponsorship is only available for one level of upgrade at a time. This request may be made at any time before or after bid closing by sending the request via email to the attention of the Standing Offer or Arrangement Authority.
- 3.5 For additional information on security requirements, bidders should consult the "Security Requirements for PWGSC Bid Solicitations - Instructions for Bidders" (<http://www.tpsgc-pwgsc.gc.ca/app-acq/lc-pl/lc-pl-eng.html#a31>) document on the Departmental Standard Procurement Documents Web site.
- 3.6 Joint Venture (JV):  
Each member of a JV Supplier must satisfy the requirements described in the resulting SA Article entitled "Security Requirement". For any given Contract, the highest level of corporate security attainable by such a JV Supplier through Canadian Industrial Security Directorate (CISD) of PWGSC is the lowest level held by any single member of the JV at the time of issuance relating to that particular Contract. For example, a JV with 5 members is comprised of 4 members holding a valid Facility Security Clearance (FSC) at the Secret level and 1 member holding a valid Designated Organizational Screening (DOS) level. The highest corporate security level for which the JV would be considered under this SA framework would be DOS until such time as the member holding a valid DOS clearance has requested sponsorship via the SA Authority and obtained a valid FSC at the Secret level, as issued by CISD.

#### **4. Financial Viability**

- 4.1 The Bidder must be financially viable to fulfill this requirement. To determine the Bidder's financial viability, the Standing Offer or Supply Arrangement Authority may, by written notice to the Bidder, require the submission of some or all of the financial information detailed below during the evaluation of bids. The Bidder must provide the following information to the Standing Offer or Supply Arrangement Authority within fifteen (15) working days of the request or as specified by the Standing Offer or Supply Arrangement Authority in the notice:
- (a) Audited financial statements, if available, or the unaudited financial statements (prepared by the Bidder's outside accounting firm, if available, or prepared in-house if no external statements have been prepared) for the Bidder's last three fiscal years, or for the years that the Bidder has been in business if this is less than three years (including, as a minimum, the Balance Sheet, the Statement of Retained Earnings, the Income Statement and any notes to the statements).
  - (b) If the date of the financial statements in (a) above is more than five months before the date of the request for information by the Standing Offer or Supply Arrangement Authority, the Bidder must also provide, unless this is prohibited by legislation for public companies, the last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement), as of two months before the date on which the Standing Offer or Supply Arrangement Authority requests this information.

- (c) If the Bidder has not been in business for at least one full fiscal year, the following must be provided:
    - (i) the opening Balance Sheet on commencement of business (in the case of a corporation, the date of incorporation); and
    - (ii) the last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement) as of two months before the date on which the Standing Offer or Supply Arrangement Authority requests this information.
  - (d) A certification from the Chief Financial Officer or an authorized signing officer of the Bidder that the financial information provided is complete and accurate.
- 4.2 If the Bidder is a joint venture, the financial information required by the Standing Offer or Supply Arrangement Authority must be provided by each member of the joint venture.
- 4.3 If the Bidder is a subsidiary of another company, then any financial information in 1. (a) to (d) above required by the Standing Offer or Supply Arrangement Authority must also be provided by the ultimate parent company. Provision of parent company financial information does not satisfy the requirement for the provision of the financial information of the Bidder, and the financial viability of a parent cannot be substituted for the financial viability of the Bidder itself.
- 4.4 **Financial Information Already Provided to Public Works and Government Services Canada (PWGSC):** The Bidder is not required to resubmit any financial information requested by the Standing Offer or Supply Arrangement Authority that is already on file at PWGSC with the Contract Cost Analysis, Audit and Policy Directorate of the Policy, Risk, Integrity and Strategic Management Sector, provided that within the above-noted time frame:
- (a) the Bidder identifies to the Standing Offer or Supply Arrangement Authority in writing the specific information that is on file and the requirement for which this information was provided; and
  - (b) the Bidder authorizes the use of the information for this requirement.
- It is the Bidder's responsibility to confirm with the Standing Offer or Supply Arrangement Authority that this information is still on file with PWGSC.
- 4.5 **Other Information:** Canada reserves the right to request from the Bidder any other information that Canada requires to conduct a complete financial viability assessment of the Bidder. The Bidder also understands that, if it is issued a Supply Arrangement, a complete financial capability review of the Supply Arrangement Holder may also be conducted at the time individual bid solicitations are issued under the Supply Arrangement.
- 4.6 **Confidentiality:** If the Bidder provides the information required above to Canada in confidence while indicating that the disclosed information is confidential, then Canada will treat the information in a confidential manner as permitted by the Access to Information Act, R.S., 1985, c. A-1, Section 20(1) (b) and (c).
- 4.7 Before the issuance of a Standing Offer or Supply Arrangement, a bidder must not be bankrupt, under the protection of any bankruptcy legislation, or have had its activities rendered inoperable for a period of one month or more. If this requirement is not met at the time of issuance of any Standing Offer or Supply Arrangement under this bid solicitation, a bidder's bid will be considered non-responsive.
5. **Price Support**

Canada may require price support to be submitted to supplement the bid to assist Canada in determining whether the Offer represents good value to Canada. Price support may include but is not limited to:

- (a) a current published price list and the percentage discount available to Canada;
- (b) two paid invoices from the past three years, for professional services similar to the ones listed under Annex A SO/SA – Requirements for Services.

It is the sole responsibility of the Bidder to demonstrate and clearly support its rate(s) to the satisfaction of PWGSC.

## **PART 5 - CERTIFICATIONS**

Bidders must provide the required certifications to be issued a Standing Offer or Supply Arrangement (SA). Canada will declare an arrangement or offer non-responsive if the required certifications are not completed and submitted as requested.

Compliance with the certifications Bidders provide to Canada is subject to verification by Canada during the bid evaluation period before issuance of a SO or SA and after such issuance. The Standing Offer or Supply Arrangement Authority will have the right to ask for additional information to verify suppliers' compliance with the certifications before such issuance. The bid will be declared non-responsive if any certification made by the Bidder is untrue, whether made knowingly or unknowingly. Failure to comply with the certifications or to comply with the request of the Standing Offer or Supply Arrangement Authority for additional information will also render the bid non-responsive.

Joint Venture (JV) Arrangements:

Except where expressly provided otherwise, any certifications required to be made by the Supplier must be made by the lead member on behalf of the JV.

### **1. Certifications to be submitted with the hard copy of the Bid:**

The following certifications must be signed and submitted with the hard copy of the bid to the Bid Receiving Unit by the date, time, and location indicated on page one of this solicitation.

- (i) the Grandfather Certification (existing SO/SA Holders only) - see Attachment E of this bid solicitation; and
- (ii) the Bidder's Statement (All bidders) - see Attachment E of this bid solicitation.

### **2. Certifications Precedent to Issuance of a Standing Offer or Supply Arrangement**

The following certifications should be provided through the Data Collection Component, but may be submitted afterwards either electronically or in hard copy. If any of these required certifications is not completed and submitted as requested, the Standing Offer or Supply Arrangement Authority will so inform the Supplier and provide the Supplier with a time frame within which to meet the requirement. Failure to comply with the request of the Standing Offer or Supply Arrangement Authority and meet the requirements within that time period will render the bid non-responsive.

***As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.***

#### **2.1 Code of Conduct and Certifications – Related Documentation**

By submitting an offer or arrangement the Bidder certifies for himself and his affiliates their full compliance with the Code of Conduct and Certifications clause of Attachment H, section 01 of the Standard Instructions – Request for Standing Offers and Supply Arrangements – Competitive Requirements. The related documentation therein required will assist Canada in confirming that the certifications are true.

#### **2.2 Federal Contractors Program - \$200,000 or more**

1. The Federal Contractors Program (FCP) requires that some suppliers, including a supplier who is a member of a joint venture, bidding for federal government contracts, valued at \$200,000 or more (including all applicable taxes), make a formal commitment to implement employment equity. This is a condition precedent to the issuance of a supply

arrangement or Standing Offer. If the Bidder, or, if the Bidder is a joint venture and if any member of the joint venture, is subject to the FCP, evidence of its commitment must be provided before the issuance of a supply arrangement or Standing Offer.

Suppliers who have been declared ineligible contractors by Human Resources and Skills Development Canada (HRSDC) are no longer eligible to receive government contracts over the threshold for solicitation of bids as set out in the *Government Contracts Regulations*. Suppliers may be declared ineligible contractors either as a result of a finding of non-compliance by HRSDC, or following their voluntary withdrawal from the FCP for a reason other than the reduction of their workforce to less than 100 employees. Any arrangements or offers from ineligible contractors, including an arrangement or offer from a joint venture that has a member who is an ineligible contractor, will be declared non-responsive.

2. If the Bidder does not fall within the exceptions enumerated in 3. (a) or (b) below, or does not have a valid certificate number confirming its adherence to the FCP, the Bidder must fax (819-953-8768) a copy of the signed form [LAB 1168](#), Certificate of Commitment to Implement Employment Equity, to the Labour Branch of HRSDC.
3. The Bidder, or, if the Bidder is a joint venture the member of the joint venture, certifies its status with the FCP, as follows:

The Bidder or the member of the joint venture

- (a) ( ) is not subject to the FCP, having a workforce of less than 100 full-time or part-time permanent employees, and/or temporary employees having worked 12 weeks or more in Canada;
- (b) ( ) is not subject to the FCP, being a regulated employer under the [Employment Equity Act](#), S.C. 1995, c. 44;
- (c) ( ) is subject to the requirements of the FCP, having a workforce of 100 or more full-time or part-time permanent employees, and/or temporary employees having worked 12 weeks or more in Canada, but has not previously obtained a certificate number from HRSDC (having not bid on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is attached;
- (d) ( ) is subject to the FCP, and has a valid certificate number as follows: e.g. has not been declared an ineligible contractor by HRSDC).

Further information on the [FCP](#) is available on the HRSDC Web site.

**Joint Venture (JV):**

Any joint venture partner having a workforce of 100 or more employees must satisfy the requirements described in the article respecting the Federal Contractors Program – Certification in Part 5 of this solicitation.

**2.3 Former Public Servant Certification**

Contracts with former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts with FPS, suppliers must provide the information required below.

## Definitions

For the purposes of this clause,

"former public servant" is any former member of a department as defined in the *Financial Administration Act*, R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

- (a) an individual;
- (b) an individual who has incorporated;
- (c) a partnership made of former public servants; or
- (d) a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"pension" means, in the context of the fee abatement formula, a pension or annual allowance paid under the *Public Service Superannuation Act* (PSSA), R.S., 1985, c. P-36, and any increases paid pursuant to the *Supplementary Retirement Benefits Act*, R.S., 1985, c. S-24 as it affects the PSSA. It does not include pensions payable pursuant to the *Canadian Forces Superannuation Act*, R.S., 1985, c. C-17, the *Defence Services Pension Continuation Act*, 1970, c. D-3, the *Royal Canadian Mounted Police Pension Continuation Act*, 1970, c. R-10, and the *Royal Canadian Mounted Police Superannuation Act*, R.S., 1985, c. R-11, the *Members of Parliament Retiring Allowances Act*, R.S., 1985, c. M-5, and that portion of pension payable to the *Canada Pension Plan Act*, R.S., 1985, c. C-8.

### Former Public Servant in Receipt of a Pension

Is the Bidder a FPS in receipt of a pension as defined above?

**YES** ( ) **NO** ( )

If so, the Bidder must provide the following information:

- (a) name of former public servant;
- (b) date of termination of employment or retirement from the Public Service.

### 2.4 Work Force Reduction Program

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of a work force reduction program? **YES** ( ) **NO** ( )

If so, the Bidder must provide the following information:

- (a) name of former public servant;
- (b) conditions of the lump sum payment incentive;
- (c) date of termination of employment;
- (d) amount of lump sum payment;
- (e) rate of pay on which lump sum payment is based;
- (f) period of lump sum payment including start date, end date and number of weeks;
- (g) number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including the Goods and Services Tax or Harmonized Sales Tax.

**2.5 SET-ASIDE FOR ABORIGINAL BUSINESS**

2.5.1 This procurement is set aside under the federal government's Procurement Strategy for Aboriginal Business, as detailed in Annex 9.4, Requirements for the Set-aside Program for Aboriginal Business, of the Supply Manual.

2.5.2 The Bidder:

- i. certifies that it meets, and will continue to meet throughout the duration of the Instrument, the requirements described in the above-mentioned annex.
- ii. agrees that any subcontractor it engages under the Instrument must satisfy the requirements described in the above-mentioned annex.
- iii. agrees to provide to Canada, immediately upon request, evidence supporting any subcontractor's compliance with the requirements described in the above-mentioned annex.

2.5.3 The Bidder must check the applicable box below:

- i.  The Bidder is an Aboriginal business that is a sole proprietorship, band, limited company, co-operative, partnership or not-for-profit organization.

OR

- ii.  The Bidder is either a joint venture consisting of two or more Aboriginal businesses or a joint venture between an Aboriginal business and a non-Aboriginal business.

2.5.4 The Bidder must check the applicable box below:

- i.  The Aboriginal business has fewer than six full-time employees.

OR

- ii.  The Aboriginal business has six or more full-time employees.

2.5.5 The Bidder must, upon request by Canada, provide all information and evidence supporting this certification. The Bidder must ensure that this evidence will be available for audit during normal business hours by a representative of Canada, who may make copies and take extracts from the evidence. The Bidder must provide all reasonably required facilities for any audits.

2.5.6 By submitting a bid, the Bidder certifies that the information submitted by the Bidder in response to the above requirements is accurate and complete.

If requested by the Supply Arrangement or Standing Offer Authority, the Bidder must provide the following certification for each owner and employee who is Aboriginal:

A) I am \_\_\_\_\_ (insert "an owner" and/or "a full-time employee") of \_\_\_\_\_ (insert name of business), and an Aboriginal person, as defined in Annex 9.4 of the Supply Manual, entitled "Requirements for the Set-aside Program for Aboriginal Business".

B) I certify that the above statement is true and consent to its verification upon request by Canada.

\_\_\_\_\_  
Printed name of owner and/or employee

\_\_\_\_\_

Signature of owner and/or employee

\_\_\_\_\_

Date

**Certification**

By submitting the bid, the Bidder certifies that the information submitted by the Bidder in response to the above requirements is accurate and complete.

## COMPONENT II – SUPPLY ARRANGEMENT, MODEL BID SOLICITATION AND RESULTING CONTRACT CLAUSES

### PART 6A - SUPPLY ARRANGEMENT

#### 1. Arrangement

The Supply Arrangement includes only those Services described in the “Requirements for Services” at Annex A SO/SA, which are also identified as Annex E SA – Qualified Categories.

***As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.***

#### 2. Security Requirement

The Supply Arrangement Authority may verify the Supplier’s security clearance with the Canadian Industrial Security Directorate (CISD), PWGSC at any time during the life of the Supply Arrangement.

##### **SECURITY REQUIREMENT FOR CANADIAN SUPPLIER:**

##### **PWGSC FILE # Common PS SRCL #6**

- 2.1 The Contractor/Supplier must, at all times during the performance of the Contract/ Supply Arrangement, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
- 2.2 The Contractor/Supplier personnel requiring access to PROTECTED information, assets or sensitive work site(s) must EACH hold a valid **RELIABILITY STATUS**, granted or approved by CISD/PWGSC.
- 2.3 The Contractor/Supplier **MUST NOT** remove any PROTECTED information or assets from the identified work site(s), and the Contractor/Supplier must ensure that its personnel are made aware of and comply with this restriction.
- 2.4 Subcontracts which contain security requirements are **NOT** to be awarded without the prior written permission of CISD/PWGSC.
- 2.5 The Contractor/Supplier must comply with the provisions of the:
  - a. Security Requirements Check List and security guide (if applicable), available on the CPSS website at: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/31-eng.html>;
  - b. *Industrial Security Manual* (Latest Edition).
- 2.6 The requirements to be procured under this Supply Arrangement are subject to the requirements in the Security Requirement Check Lists (SRCL's) identified in each individual bid solicitation. Samples of possible SRCL's are accessible through the link <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/31-eng.html>, but other SRCL's may be used. Each bid solicitation will identify the SRCL that will apply to any resulting contract.
- 2.7 In the case of a joint venture, for any given resulting contract the highest level of corporate security attainable through CISD of PWGSC is the lowest level held by any single member of the joint venture. For example, a joint venture with five (5) members is comprised of four (4) members holding a valid Facility Security Clearance (FSC) at the

Secret level and one member holding a valid Designated Organizational Screening (DOS). The highest corporate security level for which the joint venture would be considered under a bid solicitation run this Supply Arrangement would be DOS, until such time as the member holding a valid DOS clearance has requested sponsorship via the Supply Arrangement Authority and obtained a valid FSC at the Secret level as issued by CISD.

### **3. Standard Clauses and Conditions**

All clauses and conditions identified in the Supply Arrangement and resulting contract(s) by number, date and title are set out in the [Standard Acquisition Clauses and Conditions](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) Manual (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

#### **3.1 General Conditions**

2020 (2012-11-19) General Conditions - Supply Arrangement - Goods or Services, apply to and form part of the Supply Arrangement.

#### **3.2 Supply Arrangement Reporting**

The Supplier must provide a Quarterly Usage Report (QUR) to the Supply Arrangement Authority on a quarterly basis. These submissions must be made by completing and forwarding an electronic copy of the QUR (in Excel format) to the Supply Arrangement Authority at to the following email address: [SPTS.TSPS@tpsgc-pwgsc.gc.ca](mailto:SPTS.TSPS@tpsgc-pwgsc.gc.ca)

Each QUR should be submitted using the electronic template entitled "<Supplier Name> Quarterly Usage Report" (see Annex C SO/SA for a sample QUR) and should include a list of all Contracts issued to it under each Supply Arrangement, including Category, Level of Expertise, Client department and contact name, Contract number, start and end dates, number of days billed all-inclusive firm per diem rate and dollar value (both including and excluding applicable taxes).

The reports must be submitted to the SA Authority according to the following schedule:

|              |                          |                                 |
|--------------|--------------------------|---------------------------------|
| 1st quarter: | April 1 to June 30       | (Due on or before July 15th)    |
| 2nd quarter: | July 1 to September 30   | (Due on or before October 15th) |
| 3rd quarter: | October 1 to December 31 | (Due on or before January 15th) |
| 4th quarter: | January 1 to March 31    | (Due on or before April 15th)   |

If a Supplier does not receive any Contracts during the period, the Supplier must confirm this by submitting a NIL QUR report. The Supplier understands that failure to comply may result in the suspension of the Supply Arrangement.

The Supplier understands that failure to comply to this requirement may result in the suspension of authority to utilize the Supply Arrangement. PWGSC reserves the right to suspend the Supplier's Supply Arrangement without notice, if reports are not submitted on time or are inaccurate or incomplete.

**As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.**

**4. Term of Supply Arrangement**

**4.1 Period of the Supply Arrangement**

The period of the Supply Arrangement begins on \_\_\_\_\_ and ends 18 months later.

**4.2 Request for Supply Arrangement (RFSA) Bid Solicitations**

It is intended that this bid solicitation will follow the guidelines set out by PWGSC’s Professional Services National Procurement Strategy; however those guidelines are not incorporated into this document. The bid solicitation documents contain all the requirements relating to the bid solicitation. Any other information or documentation provided to or obtained by a bidder from any source is not relevant.

In as much as possible, PWGSC will issue a bid solicitation intended to replace the Supply Arrangements for the Services on an annual basis, although PWGSC reserves the right to choose to proceed with a different procurement vehicle for the requirement if it considers such action appropriate. Each such re-competition (a “renewal bid solicitation”) requires all bidders, including those who may have received instruments under the previous solicitation, to submit a bid in response to the bid solicitation in order to continue to provide services under its resulting Supply Arrangement. The terms and conditions of each refresh bid solicitation may add, modify or remove Categories/Streams, and may otherwise modify the requirements of the previous bid solicitation. As such, each renewal bid solicitation stands alone, separate and apart from any previous bid solicitation. While some aspects of a bidder's bid may incorporate by reference information already in the possession of Canada, all the requirements of a solicitation must be met by each bidder by the submission due date.

Suppliers may submit a bid for a Supply Arrangement at any time by responding to the refresh bid solicitation’s terms and conditions. Canada reserves the right to issue supply arrangements to bidders who qualify throughout the entire period of the Supply Arrangement.

Evaluations of arrangements will start on a quarterly basis. Canada will endeavor to evaluate in each quarter those submissions received by the beginning of such quarter as identified below.

This schedule may require a revision due to operational requirements and in which case suppliers will be advised.

|  | <b>Submission Period</b>                                    | <b>Submissions Due Date (14:00 at Bid Receiving Unit)</b> | <b>Evaluation Start Date</b> | <b>Estimated Award Date (subject to change)</b> |
|--|---|---|------------------------------|---|
| <b>Refresh Bid Solicitation Schedule</b> | January 1 <sup>st</sup> 2014 to March 31 <sup>st</sup> 2014 | March 31 <sup>st</sup> 2014                               | April 1 <sup>st</sup> 2014   | June 15, 2014                                   |
| <b>Refresh Bid Solicitation Schedule</b> | April 1 <sup>st</sup> 2014 to June 30, 2014                 | June 30, 2014   | July 2 <sup>nd</sup> 2014    | September 15, 2014                              |
| <b>Refresh Bid Solicitation Schedule</b> | July 1 <sup>st</sup> 2014 to September 30 2014              | September 30 2014   | October 1 <sup>st</sup> 2014 | December 15, 2014                               |

A supplier may choose to submit a quarterly bid containing an entirely new arrangement, or may propose to modify its arrangement by adding or removing Categories. Participation in a quarterly evaluation is entirely optional and not required to maintain any TSPS arrangement.

However, all arrangements whether issued quarterly or as the result of a bid submitted on the bid closing date of a refresh bid solicitation will be replaced when a refresh bid solicitation occurs. Therefore, all bidders must submit a bid before the closing date of a refresh bid solicitation in order to continue to provide services under its resulting Supply Arrangement.

## **5. Authorities**

### **5.1 Supply Arrangement Authority**

The Supply Arrangement Authority is:

Josianne Courteau  
Acting Supply Team Leader  
Public Works and Government Services Canada  
Acquisitions Branch  
Professional Services Procurement Directorate  
Portage III 11C1  
11 Laurier Street  
Gatineau, Quebec  
K1A 0S5  
Telephone: 819-934-0200  
Facsimile: 819-997-2229  
E-mail address: [spts.tsps@tpsgc-pwgsc.gc.ca](mailto:spts.tsps@tpsgc-pwgsc.gc.ca)

The Supply Arrangement Authority is responsible for the issuance of the Supply Arrangement, its administration and its revision, if applicable. Upon the issuance of a bid solicitation under the Supply Arrangement, that solicitation's Contracting Authority is responsible for any contractual issues relating to the contract solicited. Any changes to the Supply Arrangement must be authorized in writing by the Supply Arrangement Authority.

### **5.2 Supplier's Representative**

This individual is the central point of contact within the Supplier for all matters pertaining to this Supply Arrangement. The Supplier confirms that this individual has the authority to bind the Supplier. It is the Supplier's sole responsibility to ensure that the information related to the Supplier Representative is correct. If a replacement or a new Supplier Representative is required, the Supplier will;

- (i) inform CPSS by e-mail at [sspc.cpss@tpsgc-pwgsc.gc.ca](mailto:sspc.cpss@tpsgc-pwgsc.gc.ca) , and
- (ii) inform the Supply Arrangement Authority by e-mail at [SPTS.TSPS@tpsgc-pwgsc.gc.ca](mailto:SPTS.TSPS@tpsgc-pwgsc.gc.ca).

Name:  
Title:  
Telephone:  
Facsimile:  
Address:  
Email:

*[Note to Supplier: This information is as per your arrangement and is available to be viewed by Clients via the Centralized Professional Services System (CPSS) website]*

The Supplier may designate another individual to represent the Supplier for administrative and technical purposes under any contract resulting from this Supply Arrangement.

## **6. Identified Users**

The Identified Users (also called Clients) include any government department, agency or Crown Corporation listed in Schedules I, I.1, II, III, IV, and V of the *Financial Administration Act*, R.S., 1985, c. F-11 and any other party for which the Department of Public Works and Government Services has been authorized to act from time to time under section 16 of the *Department of Public Works and Government Services Act*.

Canada may, at any time, withdraw authority from any of the Identified Users to use the Supply Arrangement.

## **7. Failure to Qualify**

Canada will notify all suppliers that fail to qualify and identify the reason their proposal has been declared non-responsive. From the time a notice is sent to a supplier, the supplier will have up to the 6 months, provided that their original bid expiry has not lapsed, to modify and re-submit for re-evaluation the elements required for the classifications, streams and/or categories for which the Supplier wishes to qualify. Provided the Supplier advises PWGSC within such period that it now considers its proposal complete, PWGSC will conduct the re-evaluation in accordance with the Request for Supply Arrangement (RFSA) Bid Solicitations schedule subject to all provisions of the RFSA.

## **8. Priority of Documents**

If there is a discrepancy between the wording of any documents that appear on the list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

- (a) the articles of the Supply Arrangement;
  - (b) the general conditions 2020 (2012-11-19), General Conditions - Supply Arrangement - Goods or Services
  - (c) Annex E SA – Qualified Categories ;
  - (d) Annex A SO/SA – Requirement for Services;
  - (e) Annex B SO/SA – TSPS Generic Security Requirements Checklists (SCRLs);
  - (f) Annex C SO/SA – Quarterly Usage Report Sample
  - (g) Annex D SO/SA – Client Satisfaction Form;
  - (h) Annex F SA – Insurance Requirements;
- and
- (i) the Supplier's arrangement dated \_\_\_\_\_ ( "as clarified on \_\_\_\_\_" *or* "as amended \_\_\_\_\_").

## **9. Certifications**

Compliance with the certifications provided by the Supplier in the arrangement is a condition of the Supply Arrangement (SA) and subject to verification by Canada during the term of the SA and of any resulting contract that would continue beyond the period of the SA. If the Supplier does not comply with any certification or it is determined that any certification made by the Supplier in the arrangement is untrue, whether made knowingly or unknowingly, Canada has the right to terminate any resulting contract for default and suspend or cancel the SA.

## **10. Applicable Laws**

The Supply Arrangement (SA) and any contract resulting from the SA must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario, Canada unless otherwise stipulated in the Supplier's arrangement or resulting contract.

## **11. Suspension or Cancellation by Canada**

In addition to the circumstances identified in 2020 09, Canada may, by sending written notice to the Supplier, suspend or cancel the Supply Arrangement where the Supplier has made public any information that conflicts with the terms, conditions, pricing or availability of systems identified in this Supply Arrangement, or where the Supplier is in default in carrying out any of its obligations under this Supply Arrangement.

## **12. Aboriginal Business Certification (if applicable)**

1. Where an Aboriginal Business Certification has been provided, the Supplier warrants that its certification of compliance is accurate and complete and in accordance with the "Requirements for the Set-aside Program for Aboriginal Business" detailed in Annex 9.4 of the Supply Manual.
2. If such a Certification has been provided, the Supplier must keep proper records and documentation relating to the accuracy of the certification provided to Canada. The Supplier must obtain the written consent of the Contracting Authority before disposing of any such records documentation supporting the accuracy of the certification until the expiration of six (6) years after final payment in a contract made under the Supply Arrangement, or until settlement of all outstanding claims and disputes, resulting from a dispute in a contract made under the Supply Arrangement, whichever is later. All such records and documentation must at all times during the retention period be open to audit, inspection and examination by representatives of Canada, who may make copies and take extracts. The Supplier must provide all facilities for such audits.
3. Nothing in this clause must be interpreted as limiting the rights and remedies, which Canada may otherwise have pursuant to the Contract made under the Supply Arrangement.

## **13. Delivery Requirements Outside a Comprehensive Land Claims Settlement Area**

The resulting Supply Arrangement is not to be used for deliveries within a Comprehensive Land Claims Settlement Area (CLCSA). All requirements for delivery within a CLCSA are to be submitted to the Department of Public Works and Government Services for individual processing.

## **14. Environmental Considerations**

As part of Canada's policy directing federal departments and agencies to take the necessary steps to acquire products and services that have a lower impact on the environment than those traditionally acquired, Suppliers should:

### a) Paper consumption:

- Provide and transmit draft reports, final reports and bids in electronic format. Should printed material be required, double sided printing in black and white format is the default unless otherwise specified by the Project Authority.
- Printed material is requested on minimum recycled content of 30% and/or certified as originating from a sustainable managed forest.
- Recycle unneeded printed documents (in accordance with Security Requirements).

b) Travel requirements:

- Project Authority is encouraged to use video and/or teleconferencing where possible to cut down unnecessary travel.
- Use of Properties with Environmental Ratings: Contractors to the Government of Canada may access the PWGSC Accommodation directory, which includes Eco-Rated properties. When searching for accommodation, contractors can go to the following link and search for properties with Environmental Ratings, identified by Green Keys or Green Leafs that will honour the pricing for contractors: <http://rehelv-acrd.tpsgc-pwgsc.gc.ca/rechercher-search-eng.aspx>
- Use of public/green transit where feasible.

## 15. Insurance requirement

### 15.1 For a SA including Tier 1 only:

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.

### 15.2 For a SA including Tier 2:

The Contractor must comply with the insurance requirements specified in Annex F SA. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.

The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.

The Contractor must forward to the Contracting Authority within ten (10) days after the date of award of the Contract, a Certificate of Insurance evidencing the insurance coverage and confirming that the insurance policy complying with the requirements is in force. Coverage must be placed with an Insurer licensed to carry out business in Canada. The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

## 16. Travel and Living

The Travel and Living expenses are calculated differently between the Regions and Metropolitan areas and this may affect the total cost of a Professional Services Supply Arrangement requirement. Accordingly, if any contract resulting from a solicitation let under this supply arrangement permits payment to a Contractor in its basis of payment for Travel and Living expenses, such expense will only be reimbursed in accordance with the information provided at the following CPSS link: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/rfdso-sotli-eng.html>

***As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.***

## 17. Regions and Metropolitan Areas

The document titled "Definitions of the National Zone, Regions and Metropolitan Areas" at the following link are incorporated by reference into this supply arrangement, with the exception that for the purposes of this supply arrangement, the National Zone is to be considered as another Region:

<http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/dznrrm-dnzmra-eng.html>

The following Regions and Metropolitan areas may receive Services under this supply arrangement where a Supplier is qualified to do so:

| <b>Regions:</b>  | <b>Metropolitan Areas:</b>             |
|------------------|--|
| National Zone    |  |
| Atlantic         | Halifax, Moncton                       |
| Quebec           | Montreal, Quebec City                  |
| Ontario          | Toronto                                |
| Western          | Calgary, Edmonton, Saskatoon, Winnipeg |
| Pacific          | Vancouver, Victoria                    |
| National Capital | National Capital Region                |

## **PART 6B. BID SOLICITATION**

### **1. Bid Solicitation Documents**

Canada will use the bid solicitation template “Higher Complexity Bid Solicitation and Resulting Contract Template (HC)”, available in the Standard Acquisition Clauses and Conditions Manual (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>), based on the estimated dollar value and complexity of the requirement.

The bid solicitation will contain as a minimum the following:

- (a) security requirements;
- (b) a complete description of the Work to be performed;
- (c) 2003, Standard Instructions - Goods or Services - Competitive Requirements OR 2004, Standard Instructions – Goods or Services – Non-competitive Requirements;
- (d) bid preparation instructions;
- (e) instructions for the submission of bids (address for submission of bids, bid closing date and time);
- (f) evaluation procedures and basis of selection;
- (g) financial capability (if applicable);
- (h) certifications
- (i) conditions of the resulting contract.

### **2. Bid Solicitation Process**

#### **2.1 General:**

Bids will be solicited for specific requirements within the scope of the SA from qualified Suppliers who have been issued a SA.

A bid solicitation will be posted on the Government Electronic Tendering Service (GETS) (or as applicable with a GoC web-based electronic procurement tool) or will be e-mailed directly to supplier, depending on the selection methodology selected.

Canada may consolidate requirements across Clients and award Contracts on a periodic basis to receive best or better pricing.

#### **2.2 Identification of Contract Authorities:**

Provided a Client has the legal authority to contract, it may choose to award contracts under this SA in accordance with the Tier 1 or Tier 2 Contract Limitations described below. All contracts for Clients without authority to contract under Tier 1 or Tier 2 will be managed by PWGSC or Shared Services Canada (SSC). The Supplier agrees only to perform individual contracts made by an authorized representative of Canada pursuant to this SA that do not exceed the applicable Contract Authority value limitations.

***As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.***

#### **2.3 Tier 1 Requirement Limitations:**

Clients may award contracts to Suppliers qualified in the applicable Categor(ies) only in accordance with the following:

- (i) **Requirement Valued below \$25,000 (GST/HST included):** Clients may direct a contract to an eligible Supplier in accordance with the Government Contracts Regulations.
- (ii) **Requirement Valued at or below NAFTA Threshold (GST/HST included):** Clients are encouraged to use the Professional Services (PS) On-line application. After issuance of the ProServices Supply Arrangements, all SA requirements must be conducted using ProServices. Information relating to PS Online/ProServices can be found at the following website:  
<http://www.tpsgc-pwgsc.gc.ca/app-acq/sp-ps/index-eng.html>

Prior to issuance of ProServices, Clients may issue a contract using this SA to a Supplier satisfying the requirement particulars as set out in a bid solicitation in accordance with the following: a minimum of two Suppliers must be invited to submit a proposal via e-mail, with the Client (Identified User):

- (a) selecting by name two Suppliers from the CPSS Client Module, or
  - (b) selecting by name one Supplier from the CPSS Client Module with the second Supplier randomly selected by the CPSS Client Module, or
  - (c) not selecting any Supplier by name in which case, the CPSS Client Module will randomly select two Suppliers.
- (iii) **Requirement Valued Above NAFTA Threshold (GST/HST included):**  
Clients may issue a contract to a Supplier satisfying the requirement particulars as set out in the bid solicitation in accordance with the following: a minimum of fifteen Suppliers must be invited via e-mail to submit a proposal, with the Client:
- (a) selecting by name ten Suppliers from the CPSS Client Module, with the following five randomly selected by the CPSS Client Module, or
  - (b) selecting more than ten Suppliers from the Client Module, in which case five additional Suppliers will be randomly selected by the CPSS Client Module, or
  - (c) selecting less than ten Suppliers from the Client Module, in which case the CPSS Client Module will randomly select a number of Suppliers that, in addition to the Suppliers selected by the Client, will total fifteen.

Note: If the number of Suppliers that meet the requirement is less than fifteen, all Suppliers will be automatically selected.

- (iv) **No Limit to Invitation Process:**  
Once the minimum of Suppliers has been selected as per (ii) or (iii) above, at any time during the course of the procurement process the Client may choose to invite additional Suppliers using the CPSS Client Module. There is no limit to the maximum number of Suppliers that may be invited to submit a proposal under Tier 1; however, excepting the circumstances of 2.5 below, Suppliers may not submit a proposal in response to a solicitation unless they have been invited to do so. However, should an uninvited SA Holder wish to be invited, it may contact the Contracting Authority to request an invitation at any time prior to five days before the published bid closing date, and an invitation will be made to that SA Holder unless it would not be consistent with the efficient operation of the procurement system. In no circumstance will such an invitation require Canada to extend a bid closing date. Where additional invitations are made during the solicitation process, they may not be reflected in a bid solicitation amendment.
- (v) **Minimum Period to submit proposal:**  
At a minimum, each Tier 1 bid solicitation issued will provide Suppliers with the following minimum number of calendar days to submit their proposal, which time may be extended based upon a requirement's complexity:

- (a) Requirements less than or equal to the NAFTA threshold = five calendar days; and
- (b) Requirements greater than the NAFTA threshold up to and including \$2M = fifteen calendar days.

PWGSC reserves the right to decrease the minimum bidding period for specific requirements.

#### **2.4 Tier 2 Requirements:**

Tier 2 requirements will be managed in accordance with the following:

- (i) Tier 2 Invitation of Suppliers: Canada will invite through GETS all qualified Tier 2 Suppliers to submit a proposal in response to a bid solicitation.
- (ii) **Minimum Period to Submit Proposal:** At a minimum, each Tier 2 bid solicitation will provide qualified Suppliers with twenty calendar days to submit their proposal, which may be extended based on a requirement's complexity.
- (iii) **Category Not Offered Under Tier 1:** For Tier 1 requirements where no Supply Arrangement for a specific Category and/or Level exists, where a Tier 2 SA exists for that Category and Level, PWGSC may act as the Contracting Authority and invite qualified Tier 2 Suppliers to submit a proposal in accordance with the processes stated in 2.3 above.

PWGSC reserves the right to decrease the minimum bidding period for specific requirements.

#### **2.5 All Invited to Bid:**

For a requirement in either Tier, all Suppliers qualified in each relevant Category, Region and Metropolitan Area will be invited by e-mail or GETS to bid where:

- (i) a bid solicitation may result in multiple contracts, or
- (ii) any supplier has been provided with a request for information in respect of services that in whole or in part appear in the requirement to be solicited under this SA.

PART 6C. RESULTING CONTRACT CLAUSES

**1. General**

The conditions of any contract awarded under the Supply Arrangement will be in accordance with the resulting contract clauses of the template used for the bid solicitation.

For any contract to be awarded using:

Higher Complexity Bid Solicitation and Resulting Contract Template (HC)  
General conditions 2035 General Conditions- Services

The above template is set out in the Standard Acquisition Clauses and Conditions Manual (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

**A model RFP and Resulting Contract will be created and available for use for Identified Users.**

## COMPONENT III – STANDING OFFER AND RESULTING CONTRACT CLAUSES

### PART 7A STANDING OFFER

#### 1. Offer

- 1.1 The Standing Offer Holder (Offeror) offers to fulfill the requirement to provide only those Services identified at Annex A SO/SA – Requirement For Services which are also identified at Annex E SO – Qualified Categories and Rates.

***As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.***

#### 2. Security Requirement

##### SECURITY REQUIREMENT FOR CANADIAN OFFEROR:

PWGSC FILE # COMMON-PS-SRCL#6

- 2.1 The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
- 2.2 The Contractor/Offeror personnel requiring access to PROTECTED information, assets or sensitive work site(s) must EACH hold a valid **RELIABILITY STATUS**, granted or approved by CISD/PWGSC.
- 2.3 The Contractor/Offeror MUST NOT remove any PROTECTED information or assets from the identified work site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction.
- 2.4 Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
- 2.5 The Contractor/Offeror must comply with the provisions of the:
- Security Requirements Check List and security guide (if applicable), available on the CPSS website at: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/31-eng.html>;
  - Industrial Security Manual* (Latest Edition).
- 2.6 The requirements to be procured under this Standing Offer are subject to the requirements in the Security Requirement Check Lists (SRCL's) identified in each individual bid solicitation. Samples of possible SRCL's are accessible through the link <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/31-eng.html>, but other SRCL's may be used. Each call-up will identify the SRCL that will apply to any resulting contract.
- 2.7 In the case of a joint venture, for any given resulting contract the highest level of corporate security attainable through CISD of PWGSC is the lowest level held by any single member of the joint venture. For example, a joint venture with five (5) members is comprised of four (4) members holding a valid Facility Security Clearance (FSC) at the Secret level and one member holding a valid Designated Organizational Screening (DOS). The highest corporate security level for which the joint venture would be considered under a bid solicitation run this Supply Arrangement would be DOS, until such time as the member holding a valid DOS

clearance has requested sponsorship via the Standing Offer Authority and obtained a valid FSC at the Secret level as issued by CISD.

### **3. Standard Clauses and Conditions**

All clauses and conditions identified in the Standing Offer and resulting contract(s) by number, date and title are set out in the Standard Acquisition Clauses and Conditions (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) Manual issued by Public Works and Government Services Canada.

#### **3.1 General Conditions**

2005 (2012-11-19) General Conditions - Standing Offers - Goods or Services, apply to and form part of the Standing Offer.

#### **3.2 Standing Offers Reporting**

The Offeror must provide a Quarterly Usage Report (QUR) to the Standing Offer Authority on a quarterly basis. These submissions must be made by completing and forwarding an electronic copy of the QUR (in Excel format) to the Standing Offer Authority at to the following e-mail address: SPTS.TSPS@tpsgc-pwgsc.gc.ca

Each QUR should be submitted using the electronic template entitled "<Offeror Name> Quarterly Usage Report" (see Annex C SO/SA for a sample QUR) and should include a list of all call-ups issued to it under each Standing Offer, including Category, Level of Expertise, Client department and contact name, call-up number, start and end dates, number of days billed, all-inclusive firm per diem rate and dollar value (both including and excluding applicable taxes). The reports must be submitted to the SO Authority according to the following schedule:

1st quarter: April 1 to June 30 (Due on or before July 15th)  
2nd quarter: July 1 to September 30 (Due on or before October 15th)  
3rd quarter: October 1 to December 31 (Due on or before January 15th)  
4th quarter: January 1 to March 31 (Due on or before April 15th)

If an Offeror does not receive any call-ups during the period, the Offeror must confirm this by submitting a NIL QUR REPORT. The Offeror understands that failure to comply may result in the set-aside of the Standing Offer.

The Offeror understands that failure to comply to this requirement may result in the setting aside of authority to utilize the Standing Offer. PWGSC may suspend the Offeror's Standing Offer without notice, if reports are not submitted on time or are inaccurate or incomplete.

### **4. Term of Standing Offer**

#### **4.1 Period of Standing Offer**

The period for making Call-ups against the Standing Offer begins on \_\_\_\_\_(insert date) and ends 18 months later.

#### **4.2 Standing Offer Renewal**

#### **4.2 Request for Standing Offer (RFSO) Bid Solicitations**

It is intended that this bid solicitation will follow the guidelines set out by PWGSC's Professional Services National Procurement Strategy; however those guidelines are not incorporated into this document. The bid solicitation documents contain all the requirements relating to the bid solicitation. Any other information or documentation provided to or obtained by a bidder from any source is not relevant.

In as much as possible, PWGSC will issue a bid solicitation intended to replace the Standing Offer for the Services on an annual basis, although PWGSC reserves the right to choose to proceed with a different procurement vehicle for the requirement if it considers such action appropriate. Each such recompetition (a "refresh bid solicitation") requires all bidders, including those who may have received instruments under the previous solicitation, to submit a bid in response to the bid solicitation in order to continue to provide services under its resulting Standing Offer. The terms and conditions of each refresh bid solicitation may add, modify or remove Categories/Streams, and may otherwise modify the requirements of the previous bid solicitation. As such, each refresh bid solicitation stands alone, separate and apart from any previous bid solicitation. While some aspects of a bidder's bid may incorporate by reference information already in the possession of Canada, all the requirements of a solicitation must be met by each bidder by the closing date.

Bidders may submit a bid for a Standing Offer at any time by responding to the refresh bid solicitation's terms and conditions. Given that the Standing Offers issued are the result of an open tendering process under the trade agreements, Canada is not able to entertain request by suppliers for the qualification for offers at times other than those provided by the refresh bid solicitation process.

|  | <b>Submission Period</b>                                    | <b>Submissions Due Date (14:00 at Bid Receiving Unit)</b> | <b>Evaluation Start Date</b> | <b>Estimated Award Date (subject to change)</b> |
|--|---|---|------------------------------|---|
| <b>Refresh Bid Solicitation Schedule</b> | January 1 <sup>st</sup> 2014 to March 31 <sup>st</sup> 2014 | March 31 <sup>st</sup> 2014                               | April 1 <sup>st</sup> 2014   | June 15, 2014                                   |
| <b>Refresh Bid Solicitation Schedule</b> | April 1 <sup>st</sup> 2014 to June 30, 2014                 | June 30, 2014   | July 2 <sup>nd</sup> 2014    | September 15, 2014                              |
| <b>Refresh Bid Solicitation Schedule</b> | July 1 <sup>st</sup> 2014 to September 30 2014              | September 30 2014   | October 1 <sup>st</sup> 2014 | December 15, 2014                               |

All bidders must submit a bid before the closing date of a refresh bid solicitation in order to continue to provide services under its resulting Standing Offers.

## **5. Authorities**

### **5.1 Standing Offer Authority**

The Standing Offer Authority for the Standing Offer is:

Josianne Courteau  
 Acting Supply Team Leader  
 Public Works and Government Services Canada  
 Acquisitions Branch  
 Professional Services Procurement Directorate  
 Portage III 11C1  
 11 Laurier Street

Gatineau, Quebec  
K1A 0S5

Telephone: 819-934-0200  
Facsimile: 819-997-2229  
E-mail address: [spts.tsps@tpsgc-pwgsc.gc.ca](mailto:spts.tsps@tpsgc-pwgsc.gc.ca)

The Standing Offer Authority is responsible for the establishment of the Standing Offer, its administration and its revision, if applicable. Upon the making of a call-up, as Contracting Authority, he is responsible for any contractual issues relating to individual call-ups made against the Standing Offer by any Identified User.

## **5.2 Offeror Representative**

This individual is the central point of contact within the Offeror for all matters pertaining to this Standing Offer. The Offeror confirms that this individual has the authority to bind the Offeror. It is the Offeror's sole responsibility to ensure that the information related to the Offeror Representative is correct. If a replacement or a new Offeror Representative is required, the Offeror will;

1. inform CPSS by e-mail at [sspc.cpss@tpsgc-pwgsc.gc.ca](mailto:sspc.cpss@tpsgc-pwgsc.gc.ca) , and
2. inform the Standing Offer Authority by e-mail at [SPTS.TSPS@tpsgc-pwgsc.gc.ca](mailto:SPTS.TSPS@tpsgc-pwgsc.gc.ca).

Name:  
Title:  
Telephone:  
Facsimile:  
Address:  
Email:

*[Note to Offeror: This information is as per your offeror and is available to be viewed by Clients via the Centralized Professional Services System (CPSS) website]*

The Offeror may designate another individual to represent the Offeror for administrative and technical purposes under any contract resulting from this Standing Offer.

## **6. Identified Users**

The Identified Users (also called Clients) include any government department, agency or Crown Corporation listed in Schedules I, I.1, II, III, IV, and V of the *Financial Administration Act*, R.S., 1985, c. F-11 and any other party for which the Department of Public Works and Government Services has been authorized to act from time to time under section 16 of the *Department of Public Works and Government Services Act*.

Canada may, at any time, withdraw authority from any of the Identified Users to use the Standing Offer.

## **7. Call-up Procedures**

### **7.1 Multiple Offers Exist**

Multiple Standing Offers have been issued for this requirement. Call-ups will be allocated among all the Offerors in accordance with the processes described below within the specified monetary limitations. When accepted by Canada, each Call-up results in a separate contract between Canada and the Offeror.

## 7.2 Generation of Right of First Refusal List

The Offeror's rates per Category are attached at Annex E SO. Identified Users will use the Government of Canada's search engine to generate a right of first refusal list (List) for their requirement using the following search criteria: Regions, Metropolitan Areas, Security, Aboriginal Status, Category, Level of Expertise and number of resources. The List will rank Offerors meeting all the search criteria and possessing the necessary security clearance from the lowest cumulative price available for the requirement to the highest, in accordance with an offeror's per diem rates. The List will be available to the Identified User for Call-up issuance and may be revised over time to reflect changes in the status of any Offeror. The lowest cumulative price will be calculated by adding together all the rates per Category for the number of resources, at the Level of Expertise of the required Categories.

Example: (If no level of effort is stipulated, use one day)

Identified User Requires:

|                                  |                                   |
|----------------------------------|-----------------------------------|
| 3.2: Project Manager:            | 1 resource at Level Senior        |
| 3.10 Technical Writer:           | 2 resources at Level Intermediate |
| 2.6 Change Management Consultant | 3 resources at Level Junior       |

Highest Ranking Offeror's Response:

|                                   |   |
|-----------------------------------|---|
| 3.2: Project Manager:             | 1 resource at Level Senior @ \$900 per day = \$900                    |
| 3.10 Technical Writer:            | 2 resources at Level Intermediate @ \$400 per day = \$800             |
| 2.6 Change Management Consultant: | 3 resources at Level Junior @ \$500 per day = \$1500                  |
| Total Per Diem Rate:              | \$900 + \$800 + \$1500 = <u>\$3200 is the Lowest Cumulative Price</u> |

Second Highest Ranking Offeror's Response:

|                                  |  |
|----------------------------------|--|
| 3.2: Project Manager:            | 1 resource at Level Senior @ \$ 800 per day = \$800        |
| 3.10 Technical Writer:           | 2 resources at Level Intermediate @ \$ 375 per day = \$750 |
| 2.6 Change Management Consultant | 3 resources at Level Junior @ \$ 600 per day = \$1800      |
| Total Per Diem Rate:             | \$800+ \$750 + \$1800 = <u>\$3350</u>                      |

***As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.***

## 7.3 Offeror Selection Methodology

Clients may direct a contract at or below \$25,000 (GST / HST included) to Offerors qualified in the applicable Category(ies) in accordance with the Government Contracts Regulations, irrespective of the ranking of Offerors on the List.

For contracts above \$25,000 (GST / HST included), where the Identified User wishes to issue a Call-up under this series of standing offers it must issue an Availability Confirmation Form (ACF) as per the model at Annex F SO, to either

(i) the first ranked Offeror on the List, or

(ii) up to a maximum of ten (10) at once of the highest ranked Offerors on the List (a Group Invitation). The Standing Offer Authority may increase or decrease the maximum number of Offerors permitted in any Group Invitation during the Standing Offer on thirty (30) days' notice in writing to all Offerors who received a Standing Offer.

If a Call-up is issued, it will be issued to the Offeror that meets the assessment criteria in the ACF and is the highest ranked Offeror on the List. An Offeror ranked lower on the List cannot be chosen where an Offeror ranked above it has not been invited to respond (no ranked Offeror may be skipped).

Amongst the Group Invitation Offerors, if the highest ranking Offeror is unable to meet the assessment criteria, the next highest ranked Offeror that responded that meets the criteria may be issued the Call-up. Where that Offeror is unable to meet the assessment criteria, the Call-up may be issued to the next highest ranking Group Invitation Offeror that meets the criteria, and this process of invitation may be repeated as required within the Offerors that responded to the ACF, in accordance with the rankings on the List, until a Call-up is issued. In the event of a tie in the results of an assessment within a Group Invitation, the Call-up may be issued to the Offeror of the Identified User's choice.

Where no Offeror responds, or no Offeror is issued a Call-up in accordance with the procedures outlined above due to none of them being able to meet the assessment criteria, the Identified User may issue a single ACF to the next highest ranked Offeror, or may issue another Group Invitation for the requirement to a group comprised of the highest ranked Offerors on the List who were not invited in the previous Group Invitation. This process may be repeated as described above, proceeding sequentially down the list of ranked Offerors (no ranked Offerors may be skipped), until the Call-up is made.

#### 7.4 **Contents of the Availability Confirmation Form**

Each Availability Confirmation Form (ACF) will identify the requirements of the Identified User's requirement by describing the specific project, including:

- (a) The Contract Period, including any options;
- (b) The specific Category(ies) Level of Expertise, and the number of resource(s) required;
- (c) The estimated level of effort required;
- (d) a proposed basis of payment using either a firm price or a maximum price not to exceed a financial limitation, in accordance with the firm per diem rates attached at Annex E SO;
- (e) The location where the required Services will be delivered;
- (f) Travel and Living requirements (if applicable);
- (g) The level of security clearance(s) required to carry out the required Services;
- (h) The contact information for the Project Authority;
- (i) The assessment criteria, which may include the specific areas of the Education, Certification and/or experience required;
- (j) The particulars of the Statement of Work; and
- (k) the response due date.

The terms and conditions set out in the ACF and Resulting Call-up Clauses that form part of this Standing Offer apply to the Call-up. Individual ACF Forms may require that the Services be performed in one or the other or both of Canada's Official Languages.

#### 7.5 **Response Requirements**

By filling in the appropriate sections of the ACF, an Offeror will identify the resource(s) it is proposing to provide the Services. Offerors may respond in either official language, in accordance with the Official Languages Act and Regulations.

(i) **Contents of Response:** The response must be signed by the Offeror or by an authorized representative of the Offeror. Timely receipt and correct direction of the response is the sole responsibility of the Offeror. The response must include all

information necessary to fulfill all the requirements specified in the ACF and clearly identify:

- (a) the resource(s) proposed for the required Categories of and Level of Expertise required, along with resume(s) setting out the proposed resource(s) qualifications (experience, education, certifications - as applicable) in accordance with Annex A SO/SA – Requirements for Services; and
- (b) information requested to satisfy the level of security clearance required to carry out the Services.

(ii) **Timing of Response:** Offerors must provide the response to the Identified User within two working days of the ACF's issuance (or within a longer period if identified in the Form). Failure to provide a response within the specified time frame will be interpreted as being unable to perform the Services.

(iii) **Offeror Certification:** By submitting and signing a response to an ACF , the Offeror certifies and warrants each of the following:

- (a) Every individual proposed will be available to perform the Work starting at the time specified in the ACF or agreed to with the Identified User.
- (b) If the Offeror has proposed any resource in fulfillment of the requirement who is not an employee of the Offeror, the Offeror certifies that it has written permission from such person or the employer of such person to propose the services of such person in relation to the work to be performed in fulfillment of the requirement and to submit such person's resume to the Identified User. During the assessment of the proposed resource, the Offeror must upon the request of the Identified User provide a copy of such written permission, in relation to any or all non-employees proposed. If the Offeror fails to comply with such a request, the Offeror's response will be considered non-responsive.
- (c) It meets the insurance requirements described in this Standing Offer (if applicable).

(vi) **Offeror Acknowledgment:** By submitting and signing a response to an ACF , the Offeror acknowledges each of the following:

- (a) The Identified User has the right but is not obliged to:
  - i) seek clarification or verify any or all information provided by the Offeror with respect to the ACF , either independently or by making a request of the Offeror. Where requested the Offeror will respond to the clarification within two working days of a request by Canada or such longer period as is specified in writing;
  - ii) contact any or all of the references supplied, at the sole cost of the Offeror, to validate any information or data submitted by the Offeror. The reference will have a minimum of two working days or a longer period as specified in writing to provide the requested information to the Identified User. Wherever information provided by a reference differs from the information supplied by the Offeror, the information supplied by the reference will be the information taken as accurate.

In respect of (i) or (ii) above, if the Offeror does not provide the required information within the time limit requested, Canada may either allow additional time for the response, or consider the response not acceptable and proceed with the issuance of the ACF Form to another Offeror or Offerors in accordance with the Offeror Selection Methodology.

- (b) Canada will not delay the issuance of any Call-up to allow Offerors to obtain the required security clearance. It is the responsibility of Offerors to ensure that all information required concerning the security clearance necessary to fulfill the Call-up is provided in its response to the ACF .

## 7.6 **Assessment of Proposed Resources**

The qualifications and experience of the proposed resource(s) will be assessed against the requirements set out in Annex A SO/SA - Requirements for Services. The Identified User may request proof of successful completion of formal training, as well as reference information. Canada reserves the right to request references from an Offeror to conduct a reference check to verify the accuracy of the information provided. Should the reference(s) not confirm the required qualifications of the proposed resource(s) to perform the required services, Canada may consider the response not acceptable and proceed with the issuance of the ACF to another Offeror or Offerors in accordance with the Offeror Selection Methodology.

Where the Offeror is requested to provide information regarding qualifications or experience of its proposed resources, Offerors should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications/experience were obtained. Experience gained during formal education will not be considered work experience. All requirements for work experience will be obtained in a legitimate work environment as opposed to an educational setting. Co-op terms are considered work experience provided they are related to the required services. The month(s) of experience listed for a project whose time frame overlaps that of another referenced project will only be counted once.

Where the Offeror is requested to provide information about the education or proof about the education of the proposed individual, the individual must have obtained its education from a recognized\* Canadian university, or college or high school, or the equivalent as established by a recognized\* Canadian academic credentials assessment service\*, if obtained outside Canada.

\*The list of recognized organizations can be found under the Canadian Information Centre for International Credentials website, at the following Internet link: <http://www.cicic.ca/indexe.stm>

Where the Offeror is requested to provide proof of certification of the proposed resource, the Offeror must submit a copy of the certification received or proof that the resource have completed the certification program.

## 8. **Call-up Instrument**

The Work will be authorized or confirmed by the Identified User(s) using form PWGSC-TPSGC 942, Call-up Against a Standing Offer or electronic document.

## **9. Limitation of Call-ups**

Individual call-ups against the Standing Offer must not exceed **\$250,000.00** (Goods and Services Tax or the Harmonized Sales Tax included). The Standing Offer Authority (or their delegated representatives) may authorize the issuance call-ups in excess of \$250,000.

## **10. Priority of Documents**

If there is a discrepancy between the wording of any documents that appear on the list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

- (a) the call-up against the Standing Offer, including any annexes;
- (b) the articles of the Standing Offer;
- (c) the general conditions 2005 (2012-11-19), General Conditions - Standing Offers - Goods or Services
- (d) the general conditions 2035 (2012-11-19), General Conditions - Services, apply to and form part of the Contract
- (e) Annex E SO – Qualified Categories and Rates
- (f) Annex A SO/SA – Requirement for Services
- (g) Annex B SO/SA – TSPS Generic Security Requirements Check Lists (SRCLs)
- (h) Annex F SO - Availability Confirmation Form
- (i) Annex D SO/SA – Client Satisfaction Form
- (j) the Offeror's offer \_\_\_\_\_ (insert date of offer), \_\_\_\_\_ (if the offer was clarified or amended, insert at the time of issuance of the offer: "as clarified on \_\_\_\_\_" or "as amended \_\_\_\_\_". (insert date(s) of clarification(s) or amendment(s) if applicable).

## **11. Certifications**

Compliance with the Certifications provided by the Offeror is a condition of authorization of the Standing Offer(SO) and subject to verification by Canada during the entire period of the SO and of any resulting contract that would continue beyond the period of the SO. In the event that the Offeror does not comply with any certification or that it is determined that any certification made by the Offeror in its offer is untrue, whether made knowingly or unknowingly, Canada has the right to terminate any resulting contract for default and set aside the SO.

## **12. Applicable Laws**

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed by the laws in force in the Province of Ontario, Canada, unless otherwise stipulated in the Offeror's bid in response to the bid solicitation that resulted in this Standing Offer.

## **13. Confirmation of Qualifications**

- 13.1 The Offeror must continue to meet all the qualification requirements related to the Standing Offer during the entire period of the Standing Offer. Any certification provided by the Offeror must be true on the date of the issuance of the Standing Offer and remain true throughout the period of the Standing Offer. The Offeror must immediately notify the Standing Offer Authority if it no longer meets any of the qualification requirements of the Standing Offer.

- 13.2 The Standing Offer Authority may require the Offeror to confirm its qualification at any time and provide evidence to support its confirmation. If the Offeror no longer meets any of the requirements for qualification, Canada may, at its option:
- (a) suspend authority for the use of the Standing Offer until the Offeror has demonstrated, to the satisfaction of Canada, that it meets the requirements in respect of which it has been found deficient. During this time, no call ups will be made under the Standing Offer;
  - (b) suspend the Offeror's qualification under specific categories of the Standing Offer until the Offeror has demonstrated, to the satisfaction of Canada, that it meets the requirements in respect of which it has been found deficient. During this time, no call ups will be made under their Standing Offer for those categories;
  - (c) set aside the Standing Offer or the Offeror's qualification for specific categories, in which case, the Offeror will not be allowed to submit a new offer for consideration until the requirement is recompeted.

**14. Aboriginal Business Certification (if applicable)**

- 14.1 The Offeror warrants that the certification of compliance with the definition of an Aboriginal business set out in the Requirements for the Set-aside Program for Aboriginal Business submitted by the Offeror is accurate and complete.
- 14.2 The Offeror must keep proper records and documentation relating to the accuracy of the certification provided to Canada. The Offeror must not, without obtaining prior written consent of the Standing Offer Authority, dispose of any such records or documentation supporting the accuracy of the certification until the expiration of six years after final payment under the Contract, or until settlement of all outstanding claims and disputes, resulting from a dispute under the Contract, whichever is later. All such records and documentation must at all times during the retention period be open to audit, inspection and examination by representatives of Canada, who may make copies and take extracts. The Offeror must provide all facilities for such audits, inspections and examinations, and must furnish all such information as the representatives of Canada may from time to time require with respect to such records and documentation.
- 14.3 Nothing in this clause must be interpreted as limiting the rights and remedies which Canada may otherwise have pursuant to the Contract.

**15. Delivery Requirements Outside a CLCSA**

The Standing Offer is not to be used for deliveries within a Comprehensive Land Claims Settlement Area (CLCSA). All requirements for delivery within a CLCSA may be submitted to the Department of Public Works and Government Services for individual processing.

**16. Environmental Considerations**

Paper consumption:

- Provide and transmit draft reports, final reports and bids in electronic format. Should printed material be required, double sided printing in black and white format is the default unless otherwise specified by the Project Authority.
- Printed material is requested on minimum recycled content of 30% and/or certified as originating from a sustainably managed forest.

- Recycle unneeded printed documents (in accordance with Security Requirements).

Travel requirements:

- Project Authority is encouraged to use video and/or teleconferencing where possible to cut down unnecessary travel.
- Use of Properties with Environmental Ratings: Contractors to the Government of Canada may access the PWGSC Accommodation directory, which includes Eco-Rated properties. When searching for accommodation, contractors can go to the following link and search for properties with Environmental Ratings, identified by Green Keys or Green Leafs that will honour the pricing for contractors: <http://rehelv-acrd.tpsgc-pwgsc.gc.ca/rechercher-search-eng.aspx>
- Use of public/green transit where feasible.

### 17. Travel and Living

The Travel and Living expenses are calculated differently between the Regions and Metropolitan areas and this may affect the total cost of a Professional Services Standing Offer requirement. Accordingly, if any Call-up permits payment to a Contractor in its basis of payment for Travel and Living expenses, such expense will only be reimbursed in accordance with the information provided at the following CPSS link:

<http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/rfdso-sotli-eng.html>

***As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.***

### 18. Regions and Metropolitan Areas

The document titled “Definitions of the National Zone, Regions and Metropolitan Areas” at the following link are incorporated by reference into this standing offer, with the exception that for the purposes of this standing offer, the National Zone is to be considered another Region:

[Http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/dznrrm-dnzmra-eng.html](http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/dznrrm-dnzmra-eng.html)

| <b>Regions:</b>  | <b>Metropolitan Areas:</b>             |
|------------------|--|
| National Zone    |  |
| Atlantic         | Halifax, Moncton                       |
| Quebec           | Montreal, Quebec City                  |
| Ontario          | Toronto                                |
| Western          | Calgary, Edmonton, Saskatoon, Winnipeg |
| Pacific          | Vancouver, Victoria                    |
| National Capital | National Capital Region                |

## PART 7B. RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of any contract resulting from a call-up against the Standing Offer.

### 1. Requirement

The Contractor must perform the Work described in the call-up against the Standing Offer.

***As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.***

### 2. Task Authorization (Will be exercised if stipulated in the ACF)

**2.1 As and When Requested Task Authorizations:** The Work or a portion of the Work to be performed under the Contract will be on an “as and when requested basis” using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract. The Contractor must not commence work until a validly issued TA has been issued by Canada and received by the Contractor. The Contractor acknowledges that any work performed before such issuance and receipt will be done at the Contractor’s own risk.

### 2.2 Form and Content of Task Authorization:

- (i) The Technical Authority will provide the Contractor with a description of the task in a draft Task Authorization using the PWGSC-TPSGC 572 Task Authorization Form or DND 626 Task Authorization Form.
- (ii) The draft Task Authorization will contain the details of the activities to be performed, and must also contain the following information, if applicable:
  - (A) the task number;
  - (B) The date by which the Contractor’s response must be received (which will appear in the draft Task Authorization, but not the issued Task Authorization);
  - (C) the details of any financial coding to be used;
  - (D) the categories and the number required;
  - (E) a description of the work for the task outlining the activities to be performed and identifying any deliverables (such as reports);
  - (F) the start and completion dates;
  - (G) milestone dates for deliverables and payments (if applicable);
  - (H) the number of person-days of effort required;
  - (I) whether the work requires on-site activities and the location;
  - (J) the language profile of the resources required;
  - (K) the level of security clearance required of resources;
  - (L) the price payable to the Contractor for performing the task, with an indication of whether it is a firm price or a maximum TA price (and, for maximum price task authorizations, the TA must indicate how the final amount payable will be determined; where the TA does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was

actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and

(M) any other constraints that might affect the completion of the task.

- 2.3 Contractor's Response to Draft Task Authorization:** Within the number of working days specified in the draft TA the Contractor must provide to the Technical Authority the proposed total price for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract. The Contractor's quotation must be based on the rates set out in the Contract. The Contractor will not be paid for preparing or providing its response or for providing other information required to prepare and validly issue the TA.
- 2.4 Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:**  
To be validly issued, the initial call-up plus the cumulative value of all TAs must not exceed the Call-up limitation as set out in article 9, Limitation of Call-ups, of the Standing Offer Clauses and Conditions.  
Any TA that does not bear the appropriate signature(s) is not validly issued by Canada. Any work performed by the Contractor without receiving a validly issued TA is done at the Contractor's own risk. If the Contractor receives a TA that is not appropriately signed, the Contractor must notify the Contracting Authority. By providing written notice to the Contractor, the Contracting Authority may suspend the Technical Authority's ability to issue TAs at any time, or reduce the dollar value threshold; any suspension or reduction notice is effective upon receipt.
- 2.5 [Will be exercised if stipulated in the ACF] Refusal of Task Authorizations:** The Contractor must submit a response to every draft TA sent to it by Canada and if it does not, Canada may immediately, and without further notice, terminate the Contract for default in accordance with the General Conditions.
- 2.6 Consolidation of TAs for Administrative Purposes:** The Contract may be amended from time to time to reflect all validly issued Task Authorizations to date, to document the Work performed under those TAs for administrative purposes.
- 2.7 Minimum Work Guarantee**
- 2.7.1** In this clause,
- (i) "Maximum Contract Value" means the amount specified in the "Limitation of Expenditure" clause set out in the Contract (excluding GST/HST); and
  - (ii) "Minimum Contract Value" means 5% of the Maximum Contract Value on the date the contract is first issued.
- 2.7.2** Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with paragraph 2.7.3, subject to sub-article 2.7.4. In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract Period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.
- 2.7.3** In the event that Canada does not request work in the amount of the Minimum Contract Value during the Contract Period, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.
- 2.7.4** Canada will have no obligation to the Contractor under this article if Canada terminates the entire Contract
- (i) for default;

- (ii) for convenience as a result of any decision or recommendation of a tribunal or court that the contract be cancelled, re-tendered or awarded to another supplier; or
- (iii) for convenience within 20 business days of Contract award.

### 3. Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the *Standard Acquisition Clauses and Conditions Manual* (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

#### 3.1 General Conditions

2035 (2012-11-19) General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

Section 17 Interest on Overdue Accounts, of 2035 (2012-11-19) General Conditions - Higher Complexity - Services will not apply to payments made by credit cards.

With respect to Article 30 - Termination for Convenience, of General Conditions 2035, Subsection 04 is deleted and replaced with the following Subsections 04, 05 and 06:

- 4. The total of the amounts, to which the Contractor is entitled to be paid under this section, together with any amounts paid, due or becoming due to the Contractor must not exceed the Contract Price.
- 5. Where the Contracting Authority terminates the entire Contract and the Articles of Agreement include a Minimum Work Guarantee, the total amount to be paid to the Contractor under the Contract will not exceed the greater of
  - (a) the total amount the Contractor may be paid under this section, together with any amounts paid, becoming due other than payable under the Minimum Revenue Guarantee, or due to the Contractor as of the date of termination, or
  - (b) the amount payable under the Minimum Work Guarantee, less any amounts paid, due or otherwise becoming due to the Contractor as of the date of termination.
- 6. The Contractor will have no claim for damages, compensation, loss of profit, allowance arising out of any termination notice given by Canada under this section except to the extent that this section expressly provides. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.

***As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.***

#### 3.2 SACC Manual Clauses:

K3002C (2008-05-12) - General Conditions – Modifications - Contractor to own IP: No Explicit License Rights for Canada

***As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.***

#### **4. Security Requirement**

**[Option 1]**

The Security Requirement (SRCL and related clauses) applicable to this Contract is provided as attached at Annex B SO/SA or as specified in the Availability Confirmation Form (ACF) via an SRCL Number, but other SRCL's may be used.

**[Option 2]**

The Security Requirement (SRCL and related clauses) applicable to this contract is provided as attached at Annex B SO/SA or as specified in the ACF via an SRCL Number, but other SRCL's may be used.

Additionally, resources may be assessed for Reliability Status by the Technical Authority prior to commencing the Work, and from time to time throughout the Contract Period. The assessment may include a credit check. Upon request of the Technical Authority, in respect of any given resource, the Contractor must submit:

- (i) the current level of security clearance granted or approved by CISD/PWGSC; and
- (ii) a completed signed TBS 330-23 Form - Personnel Screening Consent and Authorization (<http://www.tbs-sct.gc.ca/tbsf-fsct/330-23-eng.pdf>).

In the event a resource does not pass the Technical Authority's assessment, Canada may immediately, and without further notice, terminate the Contract for default in accordance with the General Conditions.

**[Option 3]**

There is no PWGSC Security Requirement applicable to this Contract, however there is a Technical Authority Security Requirement. However, the Technical Authority may conduct its own local law enforcement checks, may conduct a security interview and fingerprinting session, may enforce an escorting requirement on its facilities or sites, and may deny access to a facility or site based on the results of any of these actions.

Additionally, resources may be assessed for Reliability Status by the Technical Authority prior to commencing the Work, and from time to time throughout the Contract Period. The assessment may include a credit check. Upon request of the Technical Authority, in respect of any given resource, the Contractor must submit a completed signed TBS 330-23 Form - Personnel Screening Consent and Authorization (<http://www.tbs-sct.gc.ca/tbsf-fsct/330-23-eng.pdf>).

In the event a resource does not pass the Technical Authority's assessment, Canada may immediately, and without further notice, terminate the Contract for default in accordance with the General Conditions.

#### **5. Term of Contract**

##### **5.1 Period of Contract**

The Work must be completed in accordance with the call-up against the Standing Offer.

## 6 Authorities

### 6.1 Contracting Authority *[as identified in each ACF]*

The Contracting Authority for the Contract is:

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Directorate: \_\_\_\_\_  
Division: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
Facsimile: \_\_\_\_\_  
E-mail address: \_\_\_\_\_

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

### 6.2 Technical Authority *[To be provided at the time of Contract award]*

The Technical Authority for the Contract is:

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
Facsimile: \_\_\_\_\_  
E-mail address: \_\_\_\_\_

The Technical Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Technical Authority; however, the Technical Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

### 6.3 Contractor's Representative *[as identified in the Offeror's Response to the ACF]*

***As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.***

## 7. Payment

### 7.1 Basis of Payment

*[One or more of the basis of payment options below will be specified in the ACF]*

- 7.1.1 *[Option 1]* **Professional Services provided under a Task Authorization with a Maximum Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor, in arrears, up to the Maximum Price for the TA, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out in the call-up documents,

GST/HST extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.

Estimated Cost: \$ \_\_\_\_\_

7.1.2 [Option 2] **Professional Services provided with a Maximum Price:** For professional services requested by Canada, Canada will pay the Contractor, in arrears, up to the Maximum Price in the Contract, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out in the call-up documents, GST/HST extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.

Estimated Cost: \$ \_\_\_\_\_

7.1.3 [Option 3] **Professional Services provided under a Task Authorization with a Firm Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor the firm price set out in the Task Authorization (based on the firm, all-inclusive per diem rates set out in the call-up documents), GST/HST extra.

Estimated Cost: \$ \_\_\_\_\_

7.1.4 [Option 4] **Professional Services provided with a Firm Price:** For professional services requested by Canada, Canada will pay the Contractor the firm price set out in the Contract (based on the firm, all-inclusive per diem rates set out in the call-up documents), GST/HST extra.

Estimated Cost: \$ \_\_\_\_\_

7.1.5 [Option 5] **Professional Services:** For the provision of professional services the Contractor will be paid for actual time worked, in accordance with the firm all-inclusive per diem rates set out in the call-up documents, GST/HST extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.

Estimated Cost: \$ \_\_\_\_\_

7.1.6 [One of the two options below will apply as specified by the ACF]

[Option 1] **Pre-Authorized Travel and Living Expenses**

Canada will reimburse the Contractor for its pre-authorized travel and living expenses reasonably and properly incurred in the performance of the Work and in accordance with the clause titled "Travel and Living" of the Standing Offer and which is also available at:

<http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/rfdso-sotli-eng.html>.

All payments are subject to government audit.

Estimated Cost: \$ \_\_\_\_\_

[Option 2] **Pre-Authorized Travel and Living Expenses**

Canada will not pay any travel or living expenses associated with performing the Work.

7.1.7 **GST/HST:** Estimated Cost: \$ \_\_\_\_\_

7.1.8 **Additional Charges:** The Contractor acknowledges that the Contract has been awarded as a result of a competed Standing Offer. No additional charges will be allowed to compensate for errors, oversights, misconceptions or underestimates made by the Contractor when Responding to an ACF for the Contract.

7.1.9 **Professional Services Rates:** If the Contractor does not respond or refuses to provide an individual with the qualifications described in the Contract within the time described in the Contract (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole or in part or chooses to exercise any of the rights provided to it under the general conditions, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Corrective Measure Policy (or equivalent) then in effect, which measures may include an assessment that results in conditions applied against the Contractor to be fulfilled before doing further business with Canada, or full debarment of the Contractor from bidding on future requirements.

7.1.10 **Purpose of Estimates:** All estimated costs contained in the Contract are included solely for the administrative purposes of Canada and do not represent a commitment on the part of Canada to purchase goods or services in these amounts. Any commitment to purchase specific amounts or values of goods or services are described elsewhere in the Contract.

## 7.2 Limitation of Expenditure

Canada's total liability to the Contractor under the Contract must not exceed the amount set out on page one of the Contract, less any applicable GST or HST. With respect to the amount set out on page one of the Contract, Customs duties are \_\_\_\_\_ (*As required by the ACF, insert "included", "excluded" or "subject to exemption"*) and Goods and Services Tax or Harmonized Sales Tax is included, if applicable. Any commitments to purchase specific amounts or values of goods or services are described elsewhere in the Contract.

(i) No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceed before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum when:

- (A) it is 75 percent committed, or
- (B) 2 weeks before the Contract expiry date, or
- (C) as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work, whichever comes first.

(ii) If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Providing this information does not increase Canada's liability.

## 7.3 Method of Payment [*One or more of the method of payment options below will be specified in the ACF*]

### 7.3.1 [*Option 1*] Method of Payment - Single Payment

Canada will pay the Contractor upon completion and delivery of the Work in accordance with the payment provisions of the Contract if:

- (a) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- (b) all such documents have been verified by Canada; and
- (c) the Work performed has been accepted by Canada.

**7.3.2 [Option 2] Method of Payment - Monthly Payment**

Canada will pay the Contractor on a monthly basis for work performed during the month covered by the invoice in accordance with the payment provisions of the Contract if:

- (a) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- (b) all such documents have been verified by Canada; and
- (c) the Work performed has been accepted by Canada.

**7.3.4 [Option 3] Method of Payment for Task Authorizations with a Maximum Price:**

For each Task Authorization validly issued under the Contract that contains a maximum price:

- (i) Canada will pay the Contractor no more frequently than once a month in accordance with the Basis of Payment. The Contractor must submit time sheets for each resource showing the days and hours worked to support the charges claimed in the invoice.
- (ii) Once Canada has paid the maximum TA price, Canada will not be required to make any further payment, but the Contractor must complete all the Work described in the TA, all of which is required to be performed for the maximum TA price. If the Work described in the TA is completed in less time than anticipated, and the actual time worked (as supported by the time sheets) at the rates set out in the Contract is less than the maximum TA price, Canada is only required to pay for the time spent performing the work related to that TA.

**7.3.5 [Option 4] Method of Payment for Task Authorizations with a Firm Price - Lump Sum Payment on Completion:**

Canada will pay the Contractor upon completion and delivery of all the Work associated with the Task Authorization in accordance with the payment provisions of the Contract if:

- (i) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- (ii) all such documents have been verified by Canada;
- (iii) the Work delivered has been accepted by Canada.

**7.4 No Responsibility to Pay for Work not performed due to Closure of Government Offices**

7.4.1 Where the Contractor, its employees, subcontractors, or agents are providing services on government premises under the Contract and those premises are inaccessible because of the evacuation or closure of government offices, and as a result no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if there had been no evacuation or closure.

7.4.2 If, as a result of any strike or lock-out, the Contractor or its employees, subcontractors or agents cannot obtain access to government premises and, as a result, no work is performed, Canada is not responsible for paying the Contractor for work that otherwise

would have been performed if the Contractor had been able to gain access to the premises.

## **8. Invoicing Instructions**

- 8.1 The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.

Each invoice must be supported by:

- (a) a copy of time sheets to support the time claimed;
- (b) a copy of the release document and any other documents as specified in the Contract, including any Task Authorizations issued if applicable;
- (c) a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
- (d) a copy of the monthly progress report.

- 8.2 Invoices must be distributed as follows:

The original and one copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.

## **9. Certifications**

Compliance with the certifications provided by the Contractor is a condition of the Contract and subject to verification by Canada during the entire period of the Contract. In the event that the Contractor does not comply with any certification or that it is determined that any certification made by the Contractor in its offer is untrue, whether made knowingly or unknowingly, the Contracting Authority has the right to terminate the Contract for default.

## **10. Applicable Laws**

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in the province of Ontario or as indicated in the Bidder's Standing Offer.

## **11. Priority of Documents**

If there is a discrepancy between the wording of any documents that appear on the following list, the wording of the document that first appears on the list has priority over the wording of any document that appears later on the list:

- (a) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (b) General Conditions 2035 (2012-11-19);
- (c) Annex A, Statement of Work as attached or as specified in the ACF that was let for this requirement;
- (d) Annex B, Basis of Payment as attached or as specified in the ACF that was let for this requirement;
- (e) Annex C, Security Requirements Check List as attached or as specified in the ACF that was let for this requirement;
- (f) *[Will be exercised if stipulated in the ACF]* the signed Task Authorizations including any required Certifications;
- (g) Standing Offer Number \_\_\_\_\_ (the "Standing Offer"); and

- (h) the Contractor's ACF Response dated \_\_\_\_\_ (*insert date of ACF Response*), as amended \_\_\_\_\_ (*insert date(s) of amendment(s) if applicable*).

## 12. SACC Manual Clauses

The following clauses set out in the SACC Manual will form part of the Contract:

| Number | Date       | Description   |
|--------|------------|---|
| C0705C | 2010-01-11 | Discretionary Audit   |
| A9062C | 2011-05-16 | Canadian Forces Site Regulations  |
| C2000C | 2007/11/30 | Taxes - Foreign Based Contractors   |
| A9117C | 2007/11/30 | T1204 - Direct Request  |
| C0711C | 2008/05/12 | Time Verification   |
| B9028C | 2007-05-25 | Access to Facilities and Equipment  |
| A9068C | 2010-01-11 | Government Site Regulations   |
| G1005C | 2008-05-12 | Insurance   |
| A9131C | 2011-05-16 | Controlled Goods Program <i>[Will be exercised if stipulated in the ACF]</i>                    |
| A2000C | 2006-06-16 | Foreign Nationals (Canadian Contractor) <i>[This clause or the one that follows will apply]</i> |
| A2001C | 2006-06-16 | Foreign Nationals (Foreign Contractor)  |

## 13. Reorganization of Identified User

The Contractor's obligation to perform the Work will not be affected by (and no additional fees will be payable as a result of) the renaming, reorganization, reconfiguration, or restructuring of any Identified User. The reorganization, reconfiguration and restructuring of the Identified User includes the privatization of the Identified User, its merger with another entity, or its dissolution, where that dissolution is followed by the creation of another entity or entities with mandates similar to the original Identified User. In connection with any form of reorganization, Canada may designate another department or government body as the Contracting Authority or Technical Authority, as required to reflect the new roles and responsibilities associated with the reorganization.

## 14. Professional Services

### 14.1 Requirement for Training and Familiarization

Any training required by personnel to perform specific assignments will be on the Contractor's time and expense. Canada will not provide technology training. Canada will, wherever possible, provide standards, policies, guidelines and appropriate documentation to describe how the application systems are designed and configured, as well as other assistance needed to help the Contractor's personnel to work on application systems.

### 14.2 Professional Services - General

- (a) The Contractor must provide professional services on request as specified in this Contract. All resources provided by the Contractor must meet the qualifications described in the Contract (including those relating to previous experience, professional designation, education, language proficiency and security clearance) and must be competent to provide the required services by any delivery dates described in the Contract.
- (b) If the Contractor fails to deliver any deliverable or complete any task described in the Contract on time, in addition to any other rights or remedies available to

Canada under the Contract or the law, Canada may notify the Contractor of the deficiency, in which case the Contractor must submit a written plan to the Technical Authority within ten working days detailing the actions that the Contractor will undertake to remedy the deficiency. The Contractor must prepare and implement the plan at its own expense.

- (c) In General Conditions 2035, the Article titled "Replacement of Specific Individuals" is deleted and the following applies instead:

**Replacement of Specific Individuals**

(i) if the Contractor is unable to provide the services of any specific individual identified in the Contract to perform the services, the Contractor must within five working days of the individual's departure or failure to commence Work (or, if Canada has requested the replacement, within ten working days of Canada's notice of the requirement for a replacement) provide to the Contracting Authority:

- (a) the name, qualifications and experience of a proposed replacement immediately available for Work; and
- (b) security information on the proposed replacement as specified by Canada, if applicable.

Any assessment of the information provided will occur as per (ii) (B) below.

(ii) Subject to an Excusable Delay, where Canada becomes aware that a specific individual identified under the Contract to provide services has not been provided or is not performing, the Contracting Authority may elect to:

- (a) exercise Canada's rights or remedies under the Contract or at law, including terminating the Contract for default under Article titled "Default of the Contractor", or
- (b) assess the information provided under (c) (i) above or, if it has not yet been provided, require the Contractor propose a replacement to be rated by the Technical Authority. The replacement must have qualifications and experience that meet or exceed those obtained for the original resource and be acceptable to Canada. Upon assessment of the replacement, Canada may accept the replacement, exercise the rights in (ii) (A) above, or require the Contractor to propose another replacement within five working days' notice.

Where an Excusable Delay applies, Canada may require (c) (ii) (B) above instead of terminating under the "Excusable Delay" Article. An Excusable Delay does not include resource unavailability due to allocation of the resource to another Contract or project (including those for the Crown) being performed by the Contractor or any of its affiliates.

(iii) The Contractor must not, in any event, allow performance of the Work by unauthorized replacement persons. The Contracting Authority may order that a resource stop performing the Work. In such a case, the Contractor must immediately comply with the order. The fact that the Contracting Authority does not order that a resource stop performing the Work does not relieve the Contractor from its responsibility to meet the requirements of the Contract.

(iv) The obligations in this article apply despite any changes that Canada may have made to the Client's operating environment.

**14.3 Contractor Supplied**

The Contractor must furnish the following at no additional cost to the Contract:

- (a) Contract related services that are administrative and management functions necessary to support the Contract, and the hardware, software, and communications systems necessary to interface effectively and efficiently with Canada. These include, but are not limited to: financial management, recruiting, interviewing, training, payroll preparation, travel arrangements, Contract proposal preparation, obtaining security clearances, contracting, and clerical support.
- (b) Office and working space for Contract related services, if necessary.
- (c) Office equipment and expenses necessary to perform Contract related services including: IT and network operations, hardware, software, printing, photocopying, communications, postage, express mail, paper and copying supplies, local and long distance telephone service, and other services, equipment and supplies required in support of the work.

#### **15. Timely Problem Identification**

The Contractor must immediately advise the Contracting and Project Authorities in writing of any and all situations or difficulties that the Contractor considers will have a significant impact upon the scope of the Work, expected technical achievement, delivery schedule, person-power or cost to Canada. Notwithstanding the submission of any such report, the Contractor remains responsible for the completion of the Work in accordance with the terms of the Contract.

- (a) Such reports must include proposed detailed remedial action plans to resolve or alleviate the identified situations or difficulties. The plans must set out the Contractor's detailed estimates of any increase in time, consultants and cost to effect such plans. Such plans must include all reasonable options for consideration by Canada plus the costs and consequences to Canada of taking no remedial action and must also provide a reasonable amount of time for Canada to review these options and obtain any necessary funding authorization.
- (b) The Contractor will be prohibited from claiming for any additional costs incurred in remedying a problem not reported as described above in a timely fashion, and will be required to remedy such problems at its own expense.

#### **16. Representations and Warranties**

The Contractor made statements regarding its own and its proposed resources' experience and expertise in its ACF Response that resulted in the award of the Contract and if applicable the issuance of Task Authorizations (TAs). The Contractor represents and warrants that all those statements are true and acknowledges that Canada relied on those statements in awarding the Contract and if applicable adding work to it through TA's. The Contractor also represents and warrants that it has, and all its resources and subcontractors that perform the Work have, and at all times during the Contract Period they will have, the skills, qualifications, expertise and experience necessary to perform and manage the Work in accordance with the Contract, and that the Contractor (and any resources or subcontractors it uses) has previously performed similar services for other customers.

#### **17. Transition Services at End of Contract Period**

The Contractor agrees that, in the period leading up to the end of the Contract Period and for up to three months afterwards, it will make all reasonable efforts to assist Canada in the transition from the Contract to a new contract with another supplier, if such new contract is let. The Contractor agrees that there will be no charge for these services.

## **18. Identification Protocol Responsibilities**

The Contractor will be responsible for ensuring that each of its agents, representatives or subcontractors (hereinafter referred to as Contractor Representatives) complies with the following self-identification requirements:

- (a) Contractor Representatives who attend a Government of Canada meeting (whether internal or external to Canada's offices) must identify if an individual is not a permanent employee of the Contractor prior to the commencement of the meeting, to ensure that each meeting participant is aware of the fact that the individual is not a Contractor permanent employee;
- (b) During the performance of any Work at a Government of Canada site, each Contractor Representative must be clearly identified at all times as being a Contractor Representative; and
- (c) If a Contractor Representative requires the use of the Government of Canada's e-mail system in the performance of the Work, then the individual must clearly identify him or herself as an agent or subcontractor of the Contractor in all electronic mail in the signature block as well as under "Properties." This identification protocol must also be used in all other correspondence, communication, and documentation.
- (d) If Canada determines that the Contractor is in breach of any obligation stated in this Article, upon written notice from Canada the Contractor must submit a written action plan describing corrective measures it will implement to eliminate the recurrence of the problem. The Contractor will have five working days to deliver the action plan to the Client and the Contracting Authority, and twenty working days to rectify the underlying problem.
- (e) In addition to any other rights it has under the Contract, Canada may terminate the Contract for default if the corrective measures required of the Contractor described above are not met.

**Annex A  
Requirement**

|   |           |
|---|-----------|
| <b>FLEXIBLE GRID</b>  | <b>4</b>  |
| <b>HOW TO USE THE FLEXIBLE GRID</b>                           | <b>4</b>  |
| <b>CERTIFICATIONS EXAMPLES</b>                                | <b>6</b>  |
| <br>  |           |
| <b>1. HUMAN RESOURCES SERVICES STREAM</b>                     | <b>7</b>  |
| 1.1 HUMAN RESOURCES CONSULTANT                                | 7         |
| 1.2 ORGANIZATIONAL DESIGN AND CLASSIFICATION CONSULTANT       | 8         |
| 1.3 EMPLOYMENT EQUITY CONSULTANT                              | 9         |
| 1.4 EMPLOYEE RELATION CONSULTANT                              | 10        |
| 1.5 COMPENSATION CONSULTANT                                   | 10        |
| 1.6 HR INFORMATION SYSTEM CONSULTANT                          | 10        |
| 1.7 LEADERSHIP DEVELOPMENT CONSULTANT                         | 11        |
| 1.8 STAFFING CONSULTANT                                       | 12        |
| 1.9 HR POLICY DEVELOPMENT CONSULTANT                          | 13        |
| 1.10 HR ASSISTANT CONSULTANT                                  | 13        |
| <br>  |           |
| <b>2. BUSINESS CONSULTING / CHANGE MANAGEMENT STREAM</b>      | <b>15</b> |
| 2.1 BUSINESS ANALYST  | 15        |
| 2.2 BUSINESS CONTINUITY CONSULTANT                            | 16        |
| 2.3 BUSINESS CONSULTANT                                       | 16        |
| 2.4 ORGANIZATION DEVELOPMENT CONSULTANT                       | 17        |
| 2.5 BUSINESS PROCESS CONSULTANT                               | 18        |
| 2.6 CHANGE MANAGEMENT CONSULTANT                              | 18        |
| 2.7 NEEDS ANALYSIS AND RESEARCH CONSULTANT                    | 19        |
| 2.8 BUSINESS ARCHITECT  | 19        |
| 2.9 STATISTICAL ANALYST                                       | 19        |
| 2.10 KNOWLEDGE MANAGEMENT CONSULTANT                          | 20        |
| 2.11 INFORMATION/ RECORDS MANAGEMENT/RECORDKEEPING SPECIALIST | 20        |
| 2.12 EVALUATION SERVICES CONSULTANT                           | 21        |
| 2.13 PERFORMANCE MEASUREMENT CONSULTANT                       | 22        |
| 2.14 SUBJECT MATTER EXPERT                                    | 23        |
| <b>New categories: 2.15 and 2.16.</b>                         |           |
| 2.15 LIFE CYCLE MANAGEMENT SPECIALIST                         | 24        |
| 2.16 FACILITATOR CONSULTANT                                   | 25        |
| <br>  |           |
| <b>3. PROJECT MANAGEMENT SERVICES STREAM</b>                  | <b>27</b> |
| 3.1 PROJECT ADMINISTRATOR                                     | 27        |

**Annex A  
Requirement**

|  |           |
|--|-----------|
| <b>3.2 PROJECT MANAGER</b>                           | <b>28</b> |
| <b>3.3 PROJECT LEADER /EXECUTIVE</b>                 | <b>29</b> |
| <b>3.4 PROJECT PLANNER</b>                           | <b>30</b> |
| <b>3.5 QUALITY ASSURANCE / MANAGEMENT SPECIALIST</b> | <b>31</b> |
| <b>3.6 RISK MANAGEMENT SPECIALIST</b>                | <b>31</b> |
| <b>3.7 PROCUREMENT SPECIALIST</b>                    | <b>32</b> |
| <b>3.8 FINANCIAL SPECIALIST</b>                      | <b>33</b> |
| <b>3.9 PROJECT MONITOR</b>                           | <b>33</b> |
| <b>3.10 TECHNICAL WRITER</b>                         | <b>34</b> |

|                             |
|-----------------------------|
| <b>New categories: 3.11</b> |
|-----------------------------|

|  |           |
|--|-----------|
| <b>3.11 COMMUNICATIONS CONSULTANT</b>                      | <b>35</b> |
| <br>   |           |
| <b>4. REAL PROPERTY PROJECT MANAGEMENT SERVICES STREAM</b> | <b>36</b> |
| <b>4.1 PROJECT ADMINISTRATOR FOR REAL PROPERTY</b>         | <b>36</b> |
| <b>4.2 PROJECT MANAGER FOR REAL PROPERTY</b>               | <b>37</b> |
| <b>4.3 PROJECT LEADER FOR REAL PROPERTY</b>                | <b>39</b> |
| <b>4.4 PROJECT PLANNER FOR REAL PROPERTY</b>               | <b>40</b> |
| <b>4.5 FINANCIAL/COST SPECIALIST FOR REAL PROPERTY</b>     | <b>40</b> |
| <b>4.6 PORTFOLIO PLANNER FOR REAL PROPERTY</b>             | <b>42</b> |
| <b>4.7 CLAIMS ANALYST</b>                                  | <b>43</b> |

|                      |
|----------------------|
| <b>New Stream: 5</b> |
|----------------------|

|  |           |
|--|-----------|
| <b>5. TECHNICAL, ENGINEERING AND MAINTENANCE SERVICES STREAM</b>                           | <b>44</b> |
| <b>5.1 DRAFTSPERSON / ILLUSTRATOR</b>  | <b>44</b> |
| <b>5.2 TECHNICIAN</b>  | <b>44</b> |
| <b>5.3 ENGINEER</b>  | <b>46</b> |
| <b>5.4 CLOTHING TECHNOLOGIST</b>   | <b>47</b> |
| <b>5.5 TEXTILE TECHNOLOGIST</b>  | <b>48</b> |
| <b>5.6 PERSONAL PROTECTION EQUIPMENT TECHNOLOGIST</b>                                      | <b>49</b> |
| <b>5.7 NUCLEAR/BIOLOGICAL/CHEMICAL (NBC) PERSONAL PROTECTION TECHNOLOGIST</b>              | <b>49</b> |
| <br>   |           |
| <b>5.9 FOOTWEAR TECHNOLOGIST</b>   | <b>51</b> |
| <b>5.10 PATTERN DESIGN, DEVELOPMENT, AND SIZING TECHNOLOGIST</b>                           | <b>51</b> |
| <b>5.11 CLOTHING AND PERSONAL PROTECTION EQUIPMENT DESIGN AND PROTOTYPING TECHNOLOGIST</b> | <b>52</b> |
| <b>5.12 BADGES/INSIGNIA/CEREMONIAL ACCOUTREMENTS TECHNOLOGIST</b>                          | <b>53</b> |
| <b>5.13 INTEGRATED LOGISTICS SUPPORT (ILS) SPECIALIST</b>                                  | <b>53</b> |
| <b>5.14 TECHNICAL CLERK</b>  | <b>54</b> |

**Annex A  
Requirement**

## **Annex A Requirement**

### **FLEXIBLE GRID**

Each Stream of services has its own flexible grid. The flexible grid indicates the minimum level of points required to qualify for each Level of Expertise. Various amounts of points are given for relevant education, professional certification and relevant experience. The flexible grid must be used for all categories in a Stream unless otherwise specified.

#### **Experience**

The experience must be demonstrated and be directly related to the category. Offerors/Suppliers should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications/ experience were obtained. Experience gained during formal education will not be considered work experience. All requirements for work experience will be obtained in a legitimate work environment as opposed to an educational setting. Co-op terms are considered work experience provided they are related to the required services. The month(s) of experience listed for a project whose time frame overlaps that of another referenced project, will only be counted once.

The qualifications and experience of the proposed consultant(s) will be assessed against the requirements set out in the Availability Confirmation Form (ACF) or resulting Request for Proposal (RFP). The Identified User may request reference information. Canada reserves the right to request references from an Offeror/Supplier to conduct a reference check to verify the accuracy of the information provided. Should the reference(s) not confirm the required qualifications of the proposed consultant(s) to perform the required services, Canada reserves the right to go to the next Offeror/Supplier.

If applicable, the consultant(s) proposed must meet the minimum experience requirements detailed in the ACF or resulting RFP for the category for which they are being proposed.

#### **Education**

Academic Certification (Degree, etc) must be obtained through a recognized academic institution in the field of expertise. Points will only be awarded for the highest level of education achieved by the Consultant.

If applicable, the consultant(s) proposed must meet the education requirements detailed in the ACF for the consultant category for which they are being proposed. Where the ACF or resulting RFP request the Offeror/Supplier to provide information about the education of the proposed individual, the individual must have obtained its education from a recognized\* Canadian university, college or high school, or the equivalent as established by a recognized\* Canadian academic credentials assessment service, if obtained outside Canada.

\*The list of recognized organizations can be found under the Canadian Information Centre for International Credentials website, at the following Internet link: <http://www.cicic.ca/indexe.stm>.

#### **Relevant professional certification**

The professional certification must be valid and relevant to the specific category. A maximum of one (1) certification will receive points.

If applicable, the consultant(s) proposed must meet the certification requirements detailed in the ACF or resulting RFP for the category for which they are being proposed.

#### **How to use the Flexible Grid**

Points will be allocated to each consultant proposed by the Offeror/Supplier for the education, the certification and the experience. The total of points will determine if the consultant is considered as a junior, intermediate or senior.

## Annex A Requirement

The Identified User will specify what level of expertise (junior, intermediate or senior) needed for their requirement and the Offeror/Supplier will have to propose a consultant meeting the minimum of points required to obtain that level. The Offeror/Supplier can propose a consultant with a higher level of expertise, but the per diem rate of the level of expertise required by the Identified User will apply.

Also, if needed, the Identified User has the discretion to add mandatory requirements for type and quantity of education, certification or experience and the Offeror/Supplier must propose a consultant meeting the Identified User's requirement.

The Identified User will have the responsibility to assess if the education, certification and experience are related to the category.

### **Example**

Identified User's requirements:

- In the Human Resources Services Stream, Staffing Consultant, Level of Expertise Intermediate
- Mandatory certification: Certified HR Professional (CHRP).

The flexible grid to be used is the general flexible grid of the Human Resources Services Stream:

| <b>HUMAN RESOURCES SERVICES STREAM FLEXIBLE GRID</b> |               |                       |
|--|---------------|-----------------------|
| <b>Levels of Expertise</b>                           |               |                       |
| Senior   |               | <b>Minimum 95 pts</b> |
| Intermediate   |               | <b>Minimum 70 pts</b> |
| Junior   |               | <b>Minimum 50 pts</b> |
| <b>Relevant Education to the Consultant Category</b> |               |                       |
| University (PhD, Graduate, Undergraduate, degree).   |               | 35 pts                |
| College or CEGEP Diploma / Certificate.              |               | 25 pts                |
| High School Diploma.                                 |               | 20 pts                |
| <b>Professional Certification</b>                    |               |                       |
| Relevant Professional Certification                  |               | 15 pts                |
| <b>Relevant Experience in Consultant Category</b>    |               |                       |
| ≥1 yr and <2 yrs                                     | 12-23 months  | 10 pts                |
| ≥2 yrs and <4 yrs                                    | 24-47 months  | 20 pts                |
| ≥4 yrs and <6 yrs                                    | 48-71 months  | 30 pts                |
| ≥6 yrs and <8 yrs                                    | 72-95 months  | 40 pts                |
| ≥8 yrs and <10 yrs                                   | 96-119 months | 50 pts                |
| ≥10 yrs  | 120 + months  | 60 pts                |

consultants proposed and points given:

|               | <b>Consultant A</b>                        |               | <b>Consultant B</b>              |               | <b>Consultant C</b>   |               |
|---------------|--|---------------|----------------------------------|---------------|---|---------------|
|               | <b>Résumé</b>                              | <b>Points</b> | <b>Résumé</b>                    | <b>Points</b> | <b>Résumé</b>   | <b>Points</b> |
| Education     | Bachelor                                   | 35            | CEGEP                            | 25            | High School   | 20            |
| Certification | None                                       | 0             | Certified HR Professional (CHRP) | 15            | Certified HR Professional (CHRP)  | 15            |
| Experience    | 8 years                                    | 50            | 6.5 years                        | 40            | 70 months   | 30            |
| <b>Total</b>  |  | <b>85</b>     |                                  | <b>80</b>     |   | <b>65</b>     |
| <b>Result</b> | <b>Non-Responsive:</b><br>No Certification |               | <b>Responsive</b>                |               | <b>Non-Responsive:</b><br>Does not have enough points to meet the level intermediate requirement. |               |

## **Annex A Requirement**

### **CERTIFICATIONS EXAMPLES**

The Certification must be relevant to the field of application. Acceptable certifications include but are not limited to those on the following list. Whether listed or not, it is incumbent upon the offeror to demonstrate the relevance of professional certification(s) to the proposed work.

- Appraisal Institute of Canada
- Canadian Institute of Planners
- Certification in technical writing (TWC 900 or TWC 950)
- Certified Associate in Project Management (CAPM)
- Certified Business Analyst Professional (CBAP)
- Certified Employee Benefit Specialist (CEBS)
- Construction Estimator Certified (CEC)
- Certified Financial Planner (CFP)
- Certified General Accountant (CGA)
- Certified HR Professional (CHRP)
- Certified Information Systems Security Professional (CIISP)
- Certified Management Accountants (CMA)
- Certified Management Consultant (CMC)
- Certified Professional Purchaser (C.P.P.)
- Chartered Accountant (CA)
- Chartered Financial Analyst (CFA)
- Fellow Chartered Financial Practitioner (FChFP)
- International Association of Facilitators Certified Professional Facilitator (IAF-CPF)
- International Personnel Management Association Certified Professional (IPMA-CP)
- International Personnel Management Association Certified Specialist (IPMA-CS)
- ITC2's Experience Certification
- Master Financial Planner (MFP)
- Procurement and Contract Management Program (PCMP)
- Professional Engineer (PEng)
- Real Estate Institute of Canada
- Project Management Professional (PMP)
- Project Management Institute Scheduling Professional (PMI-SP)
- Program Management Professional (PgMP)
- Professional Quantity Surveyor (PQS)
- Planning & Scheduling Professional (PSP)
- PRINCE2 Practitioner
- Registered Architect (e.g. OAA, OAQ)
- Registered Financial Planner (RFP)
- Successful completion of the Public Service Commission Appointment Framework Knowledge Test
- Accreditation in Classification in the Federal Public Service Context
- Formal training on the Federal Public Service Executive Classification Standard
- PSC Staffing Certification (issued up to Dec. 2005)
- National Staffing Council Certification (for requirements starting Jan. 2010)
- Certified Professional Facilitator (IAF – CPF)
- Master Facilitator Certification
- Certified Facilitation Specialist (CFS) designation
- DACUM Facilitator Certification from the Canadian Vocational Association

### **OTHER CONSULTANT CATEGORY SPECIFIC CERTIFICATIONS**

## Annex A Requirement

### 1. HUMAN RESOURCES SERVICES STREAM

#### Human Resources Services Stream Flexible Grid

The flexible grid applied to all Consultant Categories of the Human Resources Services Stream, unless otherwise specified.

| <b>HUMAN RESOURCES SERVICES STREAM FLEXIBLE GRID</b> |  |               |                       |
|--|--|---------------|-----------------------|
| <b>Levels of Expertise</b>                           |  |               |                       |
|  | Senior   |               | <b>Minimum 95 pts</b> |
|  | Intermediate                                       |               | <b>Minimum 70 pts</b> |
|  | Junior   |               | <b>Minimum 50 pts</b> |
| <b>Relevant Education to the Consultant Category</b> |  |               |                       |
|  | University (PhD, Graduate, Undergraduate, degree). |               | 35 pts                |
|  | College or CEGEP Diploma / Certificate.            |               | 25 pts                |
|  | High School Diploma.                               |               | 20 pts                |
| <b>Professional Certification</b>                    |  |               |                       |
|  | Relevant Professional Certification                |               | 15 pts                |
| <b>Relevant Experience in Consultant Category</b>    |  |               |                       |
|  | ≥1 yr and <2 yrs                                   | 12-23 months  | 10 pts                |
|  | ≥2 yrs and <4 yrs                                  | 24-47 months  | 20 pts                |
|  | ≥4 yrs and <6 yrs                                  | 48-71 months  | 30 pts                |
|  | ≥6 yrs and <8 yrs                                  | 72-95 months  | 40 pts                |
|  | ≥8 yrs and <10 yrs                                 | 96-119 months | 50 pts                |
|  | ≥10 yrs  | 120 + months  | 60 pts                |

#### 1.1 HUMAN RESOURCES CONSULTANT

**The required services may include, but are not limited to the following:**

HR Programs and Services can include: human resource planning, recruitment, collective bargaining, training and development, organizational design and classification, pay and benefit administration, staffing and resourcing, performance management, official languages, employment equity and employee assistance programs

1. Providing operational HR services;
2. Developing resourcing strategies linked to HR Plans, job marketing strategy and tools;
3. Assisting in redress process, appeals, grievances etc;
4. Providing advice on and/or performing analysis of the HR strategic direction and assisting in the development of HR options, aligning and integrating the HR plans with the strategic direction of the organization's business plan;
5. Participating in the development of potential HR models and assisting in the implementation of HR requirements and a transition plan to meet HR needs;
6. Developing, implementing and providing advice on policies, programs and procedures regarding human resource services and programs;
7. Planning Human Resources in areas such as organizational development, organizational planning and design, human resources utilization, job analysis, performance planning, auditing and evaluating and forecasting;
8. Providing advice on and/or participating in the establishment of processes and HR systems support for human resources programs, services and activities;
9. Providing advice on and/or participating in the development of new programs for employees to retain career mobility;
10. Identifying policy needs/concerns and performing comparative analysis of policies as well as developing policies, procedures, guidelines and Strategies;
11. Planning, developing, implementing and evaluating personnel and employee relations strategies

## **Annex A Requirement**

|  |
|--|
| <p>including policies, programs and procedures to address an organization's human resource requirements;</p> <ol style="list-style-type: none"><li>12. Advising managers and employees on the interpretation of compensation and benefit programs and collective agreements;</li><li>13. Researching, preparing and conducting grievance committees and prepare reports;</li><li>14. Conducting research and analysis and preparing recommendations, reports and/or conducting desk audits;</li><li>15. Leading, participating in the conduct of organizational and central agencies monitoring and audit initiatives;</li><li>16. Negotiating collective agreements on behalf of employers or employees, mediate labour disputes and grievances and provide advice on employee and labour relations;</li><li>17. Planning and administering HR programs;</li><li>18. Hiring and overseeing training of staff;</li><li>19. Coordinating employee performance and appraisal programs;</li><li>20. Conducting reviews, developing implementation strategies;</li><li>21. Develop training and information sessions on HR services;</li><li>22. Providing mentoring, tutoring and coaching assistance on HR services;</li><li>23. Assisting in the development of HR strategies to meet business needs;</li><li>24. Assisting in the development of Integrated Business and Human Resources Plan to meet the needs of the organization;</li><li>25. Developing and monitoring framework, conducting monitoring activities and preparing monitoring reports;</li><li>26. Developing, implementing HR related programs, framework and initiatives;</li><li>27. Evaluating programs and activities and reporting on lessons learned or making recommendations for the future;</li><li>28. Researching or fact findings developing, implementing and tracking service standards, agreements; and</li><li>29. Reviewing and proposing various organizational models.</li></ol> |
|--|

### **1.2 ORGANIZATIONAL DESIGN AND CLASSIFICATION CONSULTANT**

**The required services may include, but are not limited to the following:**

1. Performing strengths, weaknesses, opportunities, and threats (SWOT) analysis;
2. Leading organization and classification projects following project management principles;
3. Developing and/or implementing functional communities organizational models and associated generic work descriptions;
4. Developing functional charting;
5. Developing generic work description framework and develop appropriate learning tools for its application;
6. Analyzing current and end state, developing options and recommending new organizational structures (could include costing);
7. Reviewing existing work processes and organizational structures to determine their efficiency and effectiveness, and making recommendations;
8. Performing job, activities and responsibilities analysis;
9. Discussing with management in order to clearly define the activities and responsibilities of a specific function and/or organization, and provide options;
10. Reviewing, evaluating current work descriptions and recommending appropriate changes;
11. Developing and updating generic and specific work descriptions, and delineating responsibilities within streams of work;
12. Developing and implementing new classification standards and occupational group structures, as well as providing advice;
13. Providing advice and performing activities on conversion processes and redress mechanisms in the context of classification reform;
14. Identifying policy needs/concerns;
15. Researching and developing policies, guidelines, procedures and tools;

## **Annex A Requirement**

16. Researching, preparing relative, evaluating work descriptions;
17. Participating in classification grievance committees and classification committees and writing reports;
18. Researching and preparing classification relative studies;
19. Developing and/or providing advice on classification policies, procedures and tools;
20. Analyzing policies and business functional requirements to identify information, procedures and decision flows, and making recommendations;
21. Identifying organization for re-design; prototyping potential solutions, providing trade off information and suggesting a recommended course of action;
22. Identifying the required modifications to the automated processes;
23. Documenting workflow;
24. Articulating business requirements;
25. Providing advice in defining new requirements and opportunities for applying efficient and effective solutions: identifying and providing preliminary costs of potential options;
26. Provide mentoring, coaching assistance, and/or training on classification or organizational design;
27. Developing and delivering training;
28. Evaluating performance framework, developing performance needs and reporting systems and processes;
29. Researching, analyzing data and reporting on activities;
30. Carrying out performance monitoring and reporting on activities;
31. Developing and updating performance management systems, process and tools;
32. Providing advice and/or performing activities related to classification monitoring;
33. Researching, developing and implementing generic work descriptions approaches;
34. Reviewing, evaluating, new or revised work descriptions;
35. Compiling information and preparing reports; and
36. Developing, monitoring framework, conducting monitoring activities and preparing monitoring reports.

### **1.3 EMPLOYMENT EQUITY CONSULTANT**

**The required services may include, but are not limited to the following:**

1. Coordinating and providing advice on Employment Equity (EE), Diversity and Duty To Accommodate (DTA) programs;
2. Developing a promotion/communications strategy plan;
3. Developing and implementing positive measures programs for all designated groups as required;
4. Managing the DTA program by liaising with other Departments/Agencies delivering accommodation services, this includes providing presentations to management and employees; and, identifying, and providing accommodation resources;
5. Organizing seminars, workshops, etc.;
6. Publishing promotional and educational articles in departmental and regional newsletters;
7. Conducting reviews, developing implementation strategies;
8. Advising HR Systems groups and IT groups on discipline requirements;
9. Developing training and information sessions about EE;
10. Providing mentoring and coaching assistance about EE;
11. Developing pool of diversified members to participate in evaluation and assessment, developing tools to ensure adapted language in work description and selection tools as well as advertisement representative of Canadian culture and diversity;
12. Researching and developing EE and Diversity Action Plans;
13. Researching and developing EE and Diversity related programs, tools and identifying and implementing related activities;
14. Conducting System Reviews and making recommendations;
15. Establishing, coordinating and participating on various EE and Diversity Committees;
16. Developing policies, guidelines, procedures, programs and tools;
17. Developing, implementing, coordinating and promoting commemorative events and activities; and
18. Developing terms of references for EE and Diversity Committees.

## **Annex A Requirement**

### **1.4 EMPLOYEE RELATION CONSULTANT**

**The required services may include, but are not limited to the following:**

1. Directing employee relations function;
2. Performing internal audits and taking appropriate action to correct any employee relations issues;
3. Managing dispute resolution procedures;
4. Conducting reviews and developing implementation strategies;
5. Providing mentoring and coaching assistance;
6. Conducting investigations, negotiating cases, informal conflict management;
7. Developing information and training sessions in relationship management and communications;
8. Conducting investigation, negotiating cases and informal conflict management;
9. Researching, developing policies, guidelines and procedures in regards to Codes of conducts, values and ethics, conflict of interest, political activity, prevention of harassments, etc;
10. Developing employee relations policies, to ensure consistent application of organizational policies and procedures;
11. Developing occupational safety and health policies, guidelines, procedures and tools;
12. Conducting consultation activities with the unions;
13. Coordinating labour management committee meetings (national or local);
14. Researching, providing recommendation for the negotiation of collective agreements;
15. Providing advice on the interpretation of collective agreements; and
16. Developing, assisting in the development of strike contingency plans and strike management guidelines, tools, communication, and training.

### **1.5 COMPENSATION CONSULTANT**

**The required services may include, but are not limited to the following:**

1. Advising and analyzing of pension due to high level of retiree and complexity and scarce resources;
2. Providing pay and benefits services to the organization's employees and managers;
3. Payrolling (Compensation, pensions, bonuses, etc.);
4. Providing advice and guidance on special initiatives, such as pay equity, classification reform conversion and/or any new collective agreement implementation, in accordance with Federal Public Service Acts, regulations, policies, guidelines, administrative procedures, etc;
5. Preparing and studying salary and/or total compensation analysis for determination of employee compensation;
6. Reviewing and making recommendations or changes to compensation plan or procedures;
7. Overseeing program for conformance with government and organization regulations and procedures;
8. Providing assistance in producing and directing the organization's compensation program;
9. Reviewing benefit programs and providing information about their costs and coverage;
10. Providing support in implementing benefit programs and procedures;
11. Providing advice and guidance on benefit plans for the organization;
12. Developing and/or reviewing work descriptions and assessing appropriate compensation level;
13. Participating in market salary surveys;
14. Developing policies, procedures and guidelines;
15. Conducting reviews, developing implementation strategies;
16. Developing training and information sessions on compensation;
17. Providing mentoring and coaching on compensation; and
18. Participating in activities related to advice and analysis of pension due to high level of retiree and complexity and labour scarcity.

### **1.6 HR INFORMATION SYSTEM CONSULTANT**

**The required services may include, but are not limited to the following:**

## Annex A Requirement

Human Resources can include: human resource planning, recruitment, collective bargaining, training and development, organizational design and classification, pay and benefit administration, staffing and resourcing, performance management, official languages, employment equity and employee assistance programs

1. Providing advice on the development and implementation strategies related to Human Resources Information Systems (HRIS, HRMIS, PeopleSoft, SAP);
2. Examining and verifying employee information processed by automated human resources systems;
3. Compiling and analyzing statistical information and preparing system reports related to payroll, recruiting, position classification, compensation, training, equal opportunity employment, or affirmative action utilizing HRIS
4. Providing assistance with HRIS network maintenance by adding or deleting users and retaining system security;
5. Troubleshooting user technical problems, consulting HRIS IT resources where necessary and providing training;
6. Managing programs and maintaining human resources information and related records systems;
7. Developing policies, procedures and guidelines;
8. Conducting reviews, developing implementation strategies;
9. Providing mentoring and coaching assistance about HR information system;
10. Developing and providing training and information sessions about HR information system;
11. Developing HR Reports and template and tools for managers to simplify access and encourage them to use system; and
12. Developing mapping exercise, analysis of needs, implementation.

### **1.7 LEADERSHIP DEVELOPMENT CONSULTANT**

**The required services may include, but are not limited to the following:**

1. Analyzing executive/manager leadership skills strengths and weaknesses;
2. Developing leadership improvement programs;
3. Establishing and facilitating forums and workshops for managers to share leadership experiences and challenges;
4. Designing, developing and implementing mentorship programs and sessions;
5. Conducting reviews and developing implementation strategies;
6. Developing information sessions about leadership development;
7. Developing talent management and succession readiness strategies;
8. Developing target workshops that helps managers become sponsors or agents of change and how to use effective communication as a change tool;
9. Conducting benchmarking exercises; and
10. Developing key functions concepts for succession planning.

#### **LEADERSHIP DEVELOPMENT CONSULTANT FLEXIBLE GRID**

##### **Levels of Expertise**

|  |                        |        |
|--|------------------------|--------|
| Senior   | <b>Minimum 100 pts</b> |        |
| Intermediate   | <b>Minimum 80 pts</b>  |        |
| Junior   | <b>Minimum 65 pts</b>  |        |
| <b>Relevant Education to the Consultant Category</b> |                        |        |
| University (PhD, Graduate, Undergraduate, degree).   | 35 pts                 |        |
| College or CEGEP Diploma / Certificate.              | 25 pts                 |        |
| <b>Professional Certification</b>                    |                        |        |
| Relevant Professional Certification                  | 15 pts                 |        |
| <b>Relevant Experience in Consultant Category</b>    |                        |        |
| ≥1 yr and <2 yrs                                     | 12-23 months           | 15 pts |
| ≥2 yrs and <4 yrs                                    | 24-47 months           | 20 pts |

## Annex A Requirement

|                    |               |        |
|--------------------|---------------|--------|
| ≥4 yrs and <6 yrs  | 48-71 months  | 30 pts |
| ≥6 yrs and <8 yrs  | 72-95 months  | 35 pts |
| ≥8 yrs and <10 yrs | 96-119 months | 55 pts |
| ≥10 yrs            | 120 + months  | 65 pts |

### **1.8 STAFFING CONSULTANT**

**The required services may include, but are not limited to the following:**

(Please note that a Staffing Consultant who will be providing staffing advise to managers as part of their responsibilities, must have successfully completed the PSC Appointment Framework Knowledge Test for all Departments who have a signed Appointment Delegation and Accountability Instrument with the PSC.)

1. Developing staffing and resourcing strategies;
2. Developing monitoring framework and implement and conduct monitoring;
3. Providing manager with demographic information and assisting in developing strategies to meet HR needs;
4. Providing advice and guidance on different types of merit criteria/qualifications;
5. Providing advice on workforce and process pros and cons;
6. Identifying links with departmental Human Resources / Employment Equity / Business plans;
7. Providing advice on effectiveness of assessment instruments and assisting in development or choice of proper instruments;
8. Advising manager of organizational policy;
9. Assisting manager in appropriate sequencing and application of merit criteria;
10. Providing advice, guidance, and assistance on review of decision and impact of change, if any;
11. Creating departmental staffing report (s) including preparation, data gathering, interviews, and monitoring staffing report and various activities;
12. Performing activities including recourse, appeals, early intervention process, and alternative dispute resolutions for staffing purposes;
13. Extending job offers and establishing starting salaries;
14. Developing or assisting in developing strategies and plans (i.e. staffing or resourcing);
15. Developing monitoring framework and implementing and conducting monitoring;
16. Developing and reviewing appointment sub-delegation instruments, the sub-delegation process and the supporting tools (i.e. tables, sub-delegation certificates);
17. Conducting environmental and statistical reviews;
18. Reviewing organizational needs and business needs to assist in the identification of the appropriate staffing strategy or plans (including links to other plans such as the Employment Equity and Diversity Plan and the Official Languages Plan);
19. Providing advice and recommendations in regards to addressing staffing and recruitment challenges considering organizational strategies and plans;
20. Developing and implementing recruitment and employment strategies;
21. Providing advice and recommendations in selecting the choice of appointment process;
22. Preparing and conducting recruitment and staffing processes on behalf of management. This may include any or any grouping of the following activities:
  - making recommendations on the staffing process type to be undertaken;
  - drafting and finalizing the statement of merit criteria;
  - developing and preparing the assessment guide, tools and process;
  - drafting and finalizing the advertisements;
  - coordinating and participating in the assessment of priorities, and the screening and assessments of candidates;
  - coordinating and administrating tests, interviews; coordinating and completing the reference check etc; and
  - compiling and preparing the final board reports and finalizing the results of the processes (such as establishing pools of candidates).
23. Planning, developing, coordinating and administrating various staffing and staffing related initiatives such as job fairs, collective staffing and targeted Recruitment initiatives;

## **Annex A Requirement**

24. Providing operational staffing services to a group of client managers;
25. Providing advice and guidance to managers on staffing investigations, audits and Public Service Staffing Tribunal Complaints;
26. Developing staffing policies, guidelines, procedures, and tool;
27. Providing monitoring and reporting activities with respect to staffing within the organization or for central agencies;
28. Drafting staffing report(s) including the preparation, data and information gathering, interviews, drafting of documentation;
29. Developing information and learning sessions or events for managers, employees or staffing experts;
30. Reviewing employees' or candidates' qualifications to address redeployment or placement of personnel;
31. Developing a framework or process for pool management and coordinate the management of a pool;
32. Advising managers and employees on staffing policies and procedures; and
33. Providing mentoring, tutoring or coaching assistance on staffing.

### **1.9 HR POLICY DEVELOPMENT CONSULTANT**

**The required services may include, but are not limited to the following:**

HR Policy can include: human resource planning, recruitment, collective bargaining, training and development, organizational design and classification, pay and benefit administration, staffing and resourcing, performance management, official languages, employment equity and employee assistance programs

1. Developing and monitoring public policies, programs, standards and procedures;
2. Identifying policy needs and concerns;
3. Performing policy comparative analysis;
4. Advising managers on the interpretation of policies, programs and national/ international agreements and regulations;
5. Identifying change management tools and processes that support change management strategies and plans;
6. Carrying out performance monitoring and reporting activities; and
7. Develop and deliver training on application of policies.

### **1.10 HR ASSISTANT CONSULTANT**

**The required services may include, but are not limited to the following:**

HR activities can include: human resource planning, recruitment, collective bargaining, training and development, organizational design and classification, pay and benefit administration, staffing and resourcing, performance management, official languages, employment equity and employee assistance programs.

1. Ensuring the appropriate preparation, completion, distribution and filing of HR documentation;
2. Ensuring the appropriate data entry, and/or the compilation of data and information and the preparation of reports;
3. Responding to human resources inquiries and relaying the inquiry to the appropriate person;
4. Assisting in the development of administrative procedures and tools;
5. Assisting in the coordination of appointments, interviews, testing, scheduling of events and learning sessions etc;
6. Providing administrative support to HR Manager, Advisors or an HR Specialist; and
7. Providing administrative, clerical or coordinating support in the development and/or implementation of HR activities, programs and tools.
8. Executing human resources support activities;
9. Providing assistance in the areas of human resources, or employee communications;
10. Delivering a variety of written tests to candidates and requesting testing as required;
11. Training administrative assistants in client organizations on procedures and automated systems used for completing HR Activities;

## Annex A Requirement

|   |   |                       |
|---|---|-----------------------|
| 12. Providing direct advice, guidance and services to clients for HR services;<br>13. Maintaining and updating HR systems, keeping hard copies of files, records and correspondence on related current HR activities and helping develop new systems or improving the existing system;<br>14. Adjusting, modifying and updating HR management methods, practices and procedures; and<br>15. Providing administrative services to include project and research activities in a given HR sector and the implementation of a wide range of administrative procedures and processes to support the HR programs. |   |                       |
| <b>HR ASSISTANT FLEXIBLE GRID</b>   |   |                       |
| <b>Levels of Expertise</b>  |   |                       |
|   | Senior                                  | <b>Minimum 60 pts</b> |
|   | Intermediate                            | <b>Minimum 50 pts</b> |
|   | Junior                                  | <b>Minimum 30 pts</b> |
| <b>Relevant Education to the Consultant Category</b>  |   |                       |
|   | College or CEGEP Diploma / Certificate. | 25 pts                |
|   | High School Diploma.                    | 20 pts                |
| <b>Relevant Experience in Consultant Category</b>   |   |                       |
| ≥1 yr and <2 yrs  | 12-23 months                            | 10 pts                |
| ≥2 yrs and <4 yrs   | 24-47 months                            | 25 pts                |
| ≥4 yrs and <6 yrs   | 48-71 months                            | 35 pts                |
| ≥6 yrs and <8 yrs   | 72-95 months                            | 40 pts                |
| ≥8 yrs and <10 yrs  | 96-119 months                           | 45 pts                |
| ≥10 yrs   | 120 + months                            | 50 pts                |

**Annex A  
Requirement**

**2. BUSINESS CONSULTING / CHANGE MANAGEMENT STREAM**

**Business Consulting / Change Management Stream Flexible Grid**

The flexible grid applied to all consultant categories of the Business Consulting / Change Management Stream, unless otherwise specified.

| <b>BUSINESS CONSULTING / CHANGE MANAGEMENT STREAM FLEXIBLE GRID</b> |  |               |                       |
|---|--|---------------|-----------------------|
| <b>Levels of Expertise</b>  |  |               |                       |
|   | Senior   |               | <b>Minimum 95 pts</b> |
|   | Intermediate                                       |               | <b>Minimum 70 pts</b> |
|   | Junior   |               | <b>Minimum 50 pts</b> |
| <b>Relevant Education to the Consultant Category</b>                |  |               |                       |
|   | University (PhD, Graduate, Undergraduate, degree). |               | 35 pts                |
|   | College or CEGEP Diploma / Certificate.            |               | 25 pts                |
| <b>Professional Certification</b>                                   |  |               |                       |
|   | Relevant Professional Certification                |               | 15 pts                |
| <b>Relevant Experience in Consultant Category</b>                   |  |               |                       |
|   | ≥1 yr and <2 yrs                                   | 12-23 months  | 10 pts                |
|   | ≥2 yrs and <4 yrs                                  | 24-47 months  | 20 pts                |
|   | ≥4 yrs and <6 yrs                                  | 48-71 months  | 25 pts                |
|   | ≥6 yrs and <8 yrs                                  | 72-95 months  | 35 pts                |
|   | ≥8 yrs and <10 yrs                                 | 96-119 months | 50 pts                |
|   | ≥10 yrs  | 120 + months  | 60 pts                |

**2.1 BUSINESS ANALYST**

**The required services may include, but are not limited to the following:**

1. Advising Senior Management on a range of issues affecting the organization's ability to achieve the project's business objectives;
2. Identifying opportunities for organizational improvement;
3. Assisting in the prioritization and assignment of organizational improvements;
4. Developing and/or implementing an organizational improvement plan, business plan, policies and standards;
5. Making recommendations and providing advice for improvements and assisting in developing solutions, scenarios and implementing recommendations;
6. Preparing and presenting findings, status and other relevant matters;
7. Collecting and analyzing information and presenting findings on complex issues, carrying out or coordinating research as required and preparing reports;
8. Identifying and researching best practices;
9. Processing problems into solutions or new opportunities/initiatives;
10. Analyzing, advising on, and implementing business processes, strategies and functions;
11. Advising on business decisions;
12. Preparing and advising on contracts structure and enforcement;
13. Leading and managing various business systems and process improvements (*e.g., initiating redesign to promote increased efficiencies and reduce overall costs, implementing improvements to automation of process*);
14. Recognizing market factors and adapting business decisions to the context of the organization's sector and industry;
15. Implementing and advising on measures to mitigate risk;
16. Facilitating Joint Application Development (JAD) session and acting as facilitator during workshops;
17. Translating the business requirements into System/Functional requirements;
18. Analyzing and documenting the business requirements and delivering work products through the life

## Annex A Requirement

|   |  |  |                        |
|---|--|--|------------------------|
| cycle;  |  |  |                        |
| 19. Assessing the organization's capacity/capability to undertake and successfully deliver t an initiative or a change;   |  |  |                        |
| 20. Consulting stakeholders (individually or by means of facilitating group sessions) to identify comprehensive business requirements;  |  |  |                        |
| 21. Documenting business requirements for all stakeholders;   |  |  |                        |
| 22. Providing support in analyzing, evaluating and controlling risks, especially related to requirements;   |  |  |                        |
| 23. Managing the implementation of an organizational improvement plan to identify, analyze, plan, track and control organizational improvements on a continuous basis; and        |  |  |                        |
| 24. Performing Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis when producing a business case to determine whether further investment in a project is warranted. |  |  |                        |
| <b>BUSINESS ANALYST CONSULTANT FLEXIBLE GRID</b>  |  |  |                        |
| <b>Levels of Expertise</b>  |  |  |                        |
|   |  | Senior   | <b>Minimum 100 pts</b> |
|   |  | Intermediate                                       | <b>Minimum 80 pts</b>  |
|   |  | Junior   | <b>Minimum 65 pts</b>  |
| <b>Relevant Education to the Consultant Category</b>  |  |  |                        |
|   |  | University (PhD, Graduate, Undergraduate, degree). |                        |
|   |  | 35 pts   |                        |
|   |  | College or CEGEP Diploma / Certificate.            |                        |
|   |  | 25 pts   |                        |
| <b>Professional Certification</b>   |  |  |                        |
|   |  | Relevant Professional Certification                |                        |
|   |  | 15 pts   |                        |
| <b>Relevant Experience in Consultant Category</b>   |  |  |                        |
|   |  | ≥1 yr and <2 yrs                                   | 12-23 months           |
|   |  | 15 pts   |                        |
|   |  | ≥2 yrs and <4 yrs                                  | 24-47 months           |
|   |  | 20 pts   |                        |
|   |  | ≥4 yrs and <6 yrs                                  | 48-71 months           |
|   |  | 30 pts   |                        |
|   |  | ≥6 yrs and <8 yrs                                  | 72-95 months           |
|   |  | 35 pts   |                        |
|   |  | ≥8 yrs and <10 yrs                                 | 96-119 months          |
|   |  | 55 pts   |                        |
|   |  | ≥10 yrs  | 120 + months           |
|   |  | 65 pts   |                        |

### **2.2 BUSINESS CONTINUITY CONSULTANT**

**The required services may include, but are not limited to the following:**

1. Designing and conducting threat and risk assessments;
2. Developing and implementing disaster recovery plans and business continuity plans;
3. Designing exercises for executives, management and staff in the form of exercise seminars, tabletop exercises, command post exercises, simulations and/or full-scale exercises;
4. Developing exercise materials such as exercise scenarios, control plans and evaluation plans;
5. Implementing exercises for executives, management and staff;
6. Performing business continuity in the context of strategic planning, policy and standards development and organizational assessment; and
7. Analyzing and evaluating emergency operations, exercises, conducting lessons learned seminars and writing After-Action Reports.

### **2.3 BUSINESS CONSULTANT**

**The required services may include, but are not limited to the following:**

1. Specifying the organization's objectives, developing policies, standards and plans to achieve objectives;
2. Advising Senior Management on a range of issues affecting the organization's ability to achieve the business objectives;
3. Identifying opportunities for, assisting in the prioritization of, and assignment of organizational improvement;
4. Developing and/or managing the implementation of an organizational improvement plan to identify,

## **Annex A Requirement**

- analyze, plan, track and control organizational improvements on a continuous basis;
5. Making recommendations and providing advice for improvements and assisting in developing solutions and implementing recommendations;
  6. Collecting and analyzing information and presenting findings on complex issues, carrying out or coordinating research as required and preparing reports;
  7. Defining and producing business requirement document;
  8. Coaching on business;
  9. Assisting stakeholders with understanding their strategic goals;
  10. Analyzing stakeholder's business objectives and recommending and developing solutions to address their business problem;
  11. Implementing and evaluating cross-functional decisions that will enable an organization to achieve its objectives;
  12. Assessing the organization's capacity/capability to undertake and successfully deliver an initiative or a change;
  13. Defining, developing and implementing business strategies and plans;
  14. Examining the link between the goals of the organization and how the work is performed to achieve those objectives at strategic and operational levels;
  15. Processing problems into solutions or new opportunities/initiatives, identifying and researching best practices;
  16. Performing Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis; and
  17. Developing Mission and Vision statements.

### **2.4 ORGANIZATION DEVELOPMENT CONSULTANT**

**The required services may include, but are not limited to the following:**

1. Assessing the organization's capacity/capability to undertake and successfully deliver a project, an initiative or a change in the context of the existing organizational environment, programs, and policies;
2. Advising Senior Management on a range of issues affecting the organization's ability to achieve a program or project's objectives;
3. Establishing a set of business rules and policies governing an organization's human resource management arrangements;
4. Assessing existing and planned changes in HR management strategies to ensure consistency between an organization's HR management strategies and government-wide strategies;
5. Designing processes to regularly review and revise existing accountabilities and competencies as the organization evolves;
6. Performing system-centered process mapping to define the structure of organizational processes: including definition of activities to be performed, required inputs, outputs to be produced, and framework within which to operate;
7. Defining potential organizational changes and improvements based on an organization's strategy and values;
8. Developing and/or implementing organizational change and improvement plan including identifying organizational changes and improvements, and prioritization of recommended improvements;
9. Using the appropriate organizational development methodology and approach to assessment and intervention;
10. Prototyping potential solutions, scenarios, providing trade off information and suggesting a recommended course of action on organizational improvements/changes;
11. Providing advice on and/or assisting in implementing organizational changes and improvements;
12. Developing coaching, mentoring, information sessions and training the organization to perform any of the above actions;
13. Conducting reviews and developing implementation strategies; and
14. Conducting organizational health assessment and development of strategy and its implementation.

## Annex A Requirement

### **2.5 BUSINESS PROCESS CONSULTANT**

**The required services may include, but are not limited to the following:**

1. Reviewing existing work processes and organizational structure;
2. Analyzing existing business processes, identifying opportunities for process improvements;
3. Mapping existing processes and developing and mapping recommended new processes, changes;
4. Analyzing business functional requirements to identify information, procedures and decision flows;
5. Providing advice on key initiatives that enable the organization to deploy high-impact business processes that are focused, accountable and measurable;
6. Identifying candidate processes for re-design;
7. Prototyping potential solutions, scenarios, providing trade off information and suggesting a recommended course of action;
8. Providing advice in defining new requirements and opportunities for applying efficient and effective solutions;
9. Identifying and providing preliminary costs of potential options;
10. Providing advice in developing and integrating process and information models between processes to eliminate information and process redundancies;
11. Identifying, recommending and planning new processes;
12. Providing advice on and/or assisting in implementing new processes;
13. Identifying the required modifications to the automated processes;
14. Documenting workflow;
15. Using business, workflow and organizational tools;
16. Developing policies, procedures and guidelines;
17. Conducting reviews and developing implementation strategies;
18. Advising HR Systems groups and IT groups on discipline requirements;
19. Developing training and information sessions and mentoring on business processes; and
20. Analyzing and defining business processes related to both "As Is" and "To Be" status.

### **2.6 CHANGE MANAGEMENT CONSULTANT**

**The required services may include, but are not limited to the following:**

1. Designing interventions aimed at improving organizational effectiveness through system-centered change;
2. Designing interventions that improve organizational effectiveness through people-centered change and result in: bringing about change, an improved environment, greater involvement and a more responsive workforce;
3. Developing and implementing change management strategies, plans, framework;
4. Identifying change management tools and risks;
5. Providing expertise, consultative advice, guidance and coaching to build project capacity to make effective use of change management strategies and related tools;
6. Articulating the purpose of change in a manner that makes sense to staff and provides a compelling picture of the new organization;
7. Designing and conducting a change readiness assessment in order to plan and carry out a change management strategy;
8. Coaching staff on the value of their contribution within the new organization;
9. Evaluating the effectiveness of the change management initiative.
10. Developing performance measurement/evaluation frameworks;
11. Integrating performance monitoring disciplines in an organization's development or change management plan; and
12. Carrying out performance monitoring and reporting activities on change management.

## Annex A Requirement

### **2.7 NEEDS ANALYSIS AND RESEARCH CONSULTANT**

The required services may include, but are not limited to the following:

1. Conducting interviews, surveys and workshops;
2. Collecting, analyzing and synthesizing information that provides insight into best practices and lessons learned that would effectively support managing change;
3. Performing analysis of business processes to recommend the best option to address any concerns, gaps, etc. including the potential risks and benefits;
4. Providing input for the development of new processes; and
5. Carrying out analysis related to the development of business cases including the collection and analysis of cost data.

### **2.8 BUSINESS ARCHITECT**

The required services may include, but are not limited to the following:

1. Developing policies and rules that allow an organization to carry out its mandate and functional responsibilities, and that govern the organization's actual and planned capabilities in terms of data, human resources, communication facilities and management responsibilities;
2. Conducting an assessment of the project's business architecture, process and performances;
3. Recommending changes to improve operational performance;
4. Ensuring consistency and integration with the organization's and government architectures and business strategies;
5. Evaluating the feasibility of the architecture and technologies related to a business change;
6. Developing principles of operation and concept of operations;
7. Identifying risks associated with the architecture and technologies and recommending risk mitigation;
8. Advising Senior Management on trends and emerging technologies and their impact on the organization's and government architectures and business strategies;
9. Recommending alternative solutions, methodologies and strategies;
10. Assisting in the prioritization and assignment of architectural improvements;
11. Managing the development and implementation of an architectural improvement plan; and
12. Coaching, mentoring and training the organization on business architecture.

#### **BUSINESS ARCHITECT CONSULTANT FLEXIBLE GRID**

##### **Levels of Expertise**

|              |                        |
|--------------|------------------------|
| Senior       | <b>Minimum 100 pts</b> |
| Intermediate | <b>Minimum 80 pts</b>  |
| Junior       | <b>Minimum 65 pts</b>  |

##### **Relevant Education to the Consultant Category**

|  |        |
|--|--------|
| University (PhD, Graduate, Undergraduate, degree). | 35 pts |
| College or CEGEP Diploma / Certificate.            | 25 pts |

##### **Professional Certification**

|                                     |        |
|-------------------------------------|--------|
| Relevant Professional Certification | 15 pts |
|-------------------------------------|--------|

##### **Relevant Experience in Consultant Category**

|                    |               |        |
|--------------------|---------------|--------|
| ≥1 yr and <2 yrs   | 12-23 months  | 15 pts |
| ≥2 yrs and <4 yrs  | 24-47 months  | 20 pts |
| ≥4 yrs and <6 yrs  | 48-71 months  | 30 pts |
| ≥6 yrs and <8 yrs  | 72-95 months  | 35 pts |
| ≥8 yrs and <10 yrs | 96-119 months | 55 pts |
| ≥10 yrs            | 120 + months  | 65 pts |

### **2.9 STATISTICAL ANALYST**

The required services may include, but are not limited to the following:

## **Annex A Requirement**

1. Reporting results of statistical analyses, including information in the form of graphs, charts, and tables;
2. Processing large amounts of data for statistical modeling and graphic analysis, using computers;
3. Identifying relationships and trends in data, as well as any factors that could affect the results of research;
4. Analyzing and interpreting statistical data in order to identify significant differences in relationships among sources of information;
5. Preparing estimates and forecasts using statistical techniques;
6. Preparing data for processing by organizing information, checking for any inaccuracies, and adjusting and weighting the raw data;
7. Evaluating the statistical methods and procedures used to obtain data in order to ensure validity, applicability, efficiency, and accuracy;
8. Evaluating sources of information in order to determine any limitations in terms of reliability or usability;
9. Planning data collection methods for specific projects, and determining the types and sizes of sample groups to be used; and
10. Designing research projects that apply valid scientific techniques and utilizing information obtained from baselines or historical data in order to structure uncompromised and efficient analyses.

### **2.10 KNOWLEDGE MANAGEMENT CONSULTANT**

**The required services may include, but are not limited to the following:**

1. Developing, planning strategies and processes to transfer explicit and tacit knowledge across time, space and organizational change, including retrieval of critical archived information;
2. Facilitating knowledge creation, sharing and reuse;
3. Developing partnerships and alliances, designing creative knowledge spaces, and using incentive structures;
4. Facilitating knowledge of learning styles and behaviours, strive for continuous improvement and be actively engaged in exploring new ideas and concepts;
5. Designing, developing and sustaining communities of interest and practice;
6. Creating, developing and sustaining the flow of knowledge, policies and standards;
7. Understanding the breakthrough skills needed to leverage virtual teamwork and the effective use of social networks;
8. Performing cultural and ethnographic analyses, developing knowledge taxonomies, facilitating knowledge audits, and performing knowledge mapping and needs assessments;
9. Capturing, evaluating and using best-known practices to transfer best practices;
10. Providing mentoring, training and coaching assistance on knowledge management;
11. Moderating focus group/discussion;
12. Consulting on group process;
13. Developing research and implementation strategies for knowledge management, information management, document and records management and data management;
14. Managing change knowledge initiatives and retrieval of critical archived information;
15. Providing group problem solving and decision making;
16. Providing strategic or participatory planning; and
17. Performing Team Building activities.

### **2.11 INFORMATION/ RECORDS MANAGEMENT/RECORDKEEPING SPECIALIST**

**The required services may include, but are not limited to the following:**

1. Collecting, crating, receiving and/or capturing information;
2. Organizing, using, and/or disseminating information;
3. Maintaining, storing and/or preserving information;
4. Disposing of information;
5. Coordinating management of an organization's information-based resources, including its information

## **Annex A Requirement**

- holdings and investment in technology;
6. Planning, directing and controlling all of the organization's information-based resources to meet corporate goals and to deliver programs and services;
  7. Coordinating of information storage requirements and interface with Information Technology;
  8. Providing document and records management;
  9. Coordinating Access to Information and Privacy Act requirements;
  10. Defining produce business requirement document.
  11. Conducting subject-specific research in the archival holdings of federal departments and agencies;
  12. Producing professional research reports based on detailed research into federal records;
  13. Developing, organizing, monitoring, conducting and reporting on sustained archival research projects;
  14. Identifying, classifying, archiving, preserving, and destroying records;
  15. Responsible for the efficient and systematic control of the creation, receipt, maintenance, use and disposition of records, including the processes for capturing and maintaining evidence of and information about business activities and transactions in the form of records.
  16. Managing a library or a library service;
  17. Cataloguing, indexing and classifying information audio-visual and electronic documents;
  18. Organizing and maintaining "virtual" services;
  19. Establishing and implementing metadata standards and guidelines;
  20. Analyzing and reporting on the effectiveness of the implementation of information management standards;
  21. Identifying and analyzing content management issues and providing recommendations to management for improvement;
  22. Delivering research and reference services;
  23. Searching online systems and the web to find information; and
  24. Delivering library services;
  25. Provide advice and guidance in the field of Recordkeeping as relates to Capacity Building, Legacy Records Management and e-Records Sustainability;
  26. Provide advice and guidance in the field of Recordkeeping as relates to the implementation of Recordkeeping policy, regulations and legal requirements;
  27. Provide assistance in the monitory and evaluation of the Recordkeeping policies and regulations

### **2.12 EVALUATION SERVICES CONSULTANT**

**The required services may include, but are not limited to the following:**

1. Assessing the readiness of a policy, program or initiative to be evaluated;
2. Planning specific evaluations or related studies of individual or clusters of programs, policies or initiatives;
3. Developing terms of reference for evaluation projects;
4. Preparing logic models, program theories/theories of change or assessment tools;
5. Constructing work plans, including evaluation planning reports or frameworks and associated methodologies;
6. Developing, testing and implementing evaluation methods and data collection tools (including surveys, interview guides, focus group discussions, case studies);
7. Collecting and analyzing both qualitative and quantitative data (including socio-economic and statistical analysis, collecting baseline data, conducting impact analysis);
8. Assessing the relevance and performance (including impact, efficiency and cost-effectiveness) of programs, policies or initiatives;
9. Validating evaluation approaches, methodologies, findings, conclusions and recommendations, using methods such as but not limited to: validation with participants, organizations and conduct of expert panels or peer reviews;
10. Developing evaluation reports or associated products (briefing note, deck, technical report) containing findings, conclusions and recommendations, and undertake report validation and consultations where appropriate and requested;
11. Conducting and writing synthesis or meta-evaluations;

## Annex A Requirement

|   |               |                       |
|---|---------------|-----------------------|
| 12. Aid in the compilation, analysis and dissemination of findings, lessons learned and best practices;                         |               |                       |
| 13. Briefing evaluation staff and program management on major results and findings, including preparation of presentations; and |               |                       |
| 14. Aid in writing other materials, documents, tools and instruments related to the work.                                       |               |                       |
| <b>EVALUATION SERVICES CONSULTANT FLEXIBLE GRID</b>   |               |                       |
| <b>Levels of Expertise</b>  |               |                       |
| Senior  |               | <b>Minimum 95 pts</b> |
| Intermediate  |               | <b>Minimum 80 pts</b> |
| Junior  |               | <b>Minimum 65 pts</b> |
| <b>Relevant Education to the Consultant Category</b>  |               |                       |
| Graduate degree or higher   |               | 35 pts                |
| Undergraduate degree  |               | 25 pts                |
| <b>Professional Certification</b>   |               |                       |
| Relevant Professional Certification   |               | 10 pts                |
| <b>Relevant Experience in Consultant Category</b>   |               |                       |
| ≥2 yrs and <4 yrs   | 24-47 months  | 30 pts                |
| ≥4 yrs and <6 yrs   | 48-71 months  | 35 pts                |
| ≥6 yrs and <10 yrs  | 72-119 months | 45 pts                |
| ≥10 yrs   | 120 + months  | 60 pts                |

|  |              |                       |
|--|--------------|-----------------------|
| <b>2.13 PERFORMANCE MEASUREMENT CONSULTANT</b>   |              |                       |
| <b>The required services may include, but are not limited to the following:</b>  |              |                       |
| <ol style="list-style-type: none"> <li>1. Planning and designing performance measurement frameworks in support of departmental Strategic Outcomes and Program Activity Architectures or performance measurement strategies in support of program monitoring and evaluations, including identifying associated performance measures in accordance with Treasury Board policies and Treasury Board Secretariat guidance and directives;</li> <li>2. Assessing the adequacy of current performance measurement frameworks and performance measures in federal organizations and the capacity of organizations to create and maintain on-going performance measurement systems at the level of the organization as a whole or at the program, initiative or project level;</li> <li>3. Developing conceptual frameworks, methodological approaches and designs for performance measurement of projects, programs, services, organizations/institutions, policies and initiatives;</li> <li>4. Developing performance measurement indicators/measures/benchmarks and tools and instruments for project, program, institutional, or policy monitoring, reviews, or on-going assessments;</li> <li>5. Providing performance measurement advice and support (e.g. support managers to identify, track and report on results throughout the life cycle of projects, programs, services, policies or initiatives), including providing training or information sessions to build capacity within the organization and assist program management with the establishment of an appropriate ongoing performance measurement system;</li> <li>6. Compiling, analyzing and/or interpreting performance data and preparing performance reports; and</li> <li>7. Research performance measurement uses and practices in other jurisdictions (includes provincial and international jurisdictions).</li> </ol> |              |                       |
| <b>PERFORMANCE MEASUREMENT CONSULTANT FLEXIBLE GRID</b>  |              |                       |
| <b>Levels of Expertise</b>   |              |                       |
| Senior   |              | <b>Minimum 65 pts</b> |
| Intermediate   |              | <b>Minimum 55 pts</b> |
| Junior   |              | <b>Minimum 45 pts</b> |
| <b>Relevant Education to the Consultant Category</b>   |              |                       |
| Graduate degree or higher  |              | 30 pts                |
| Undergraduate degree   |              | 25 pts                |
| <b>Relevant Experience in Consultant Category</b>  |              |                       |
| ≥2 yrs and <4 yrs  | 24-47 months | 25 pts                |

## Annex A Requirement

|                    |               |        |
|--------------------|---------------|--------|
| ≥4 yrs and <6 yrs  | 48-71 months  | 30 pts |
| ≥6 yrs and <10 yrs | 72-119 months | 35 pts |
| ≥10 yrs            | 120 + months  | 40 pts |

### **2.14 SUBJECT MATTER EXPERT**

**THIS CATEGORY CAN ONLY BE USE AS PART OF A TEAM WHERE CATEGORY 2.12 EVALUATION SERVICES CONSULTANT OR 2.13 PERFORMANCE MEASUREMENT CONSULTANT IS USED.**

**Possible subject matter areas of expertise include but are not limited to :** Social sciences; General government services; International affairs; Immigration; Defence; Industrial, regional, and scientific-technological support; Economic development; Environmental and resource-base; Security and public safety; Cultural issues (including multiculturalism); Transportation; Justice and legal; International Policy; International Trade and Commerce; Governance and Corporate Operations; Treasury Operations; and Taxation and Tax Policy.

**The required services may include, but are not limited to the following:**

1. Providing orientation on their field of expertise to a range of target groups (e.g. program managers, evaluators, corporate planners) including details on key issues in the field and details on best practices in terms of performance measurement and evaluation in those fields;
2. Advising on the design of new or adequacy of existing a) performance measurement frameworks in support of departmental Strategic Outcomes and Program Activity Architectures or b) performance measurement strategies in support of program monitoring and evaluation, including identifying appropriate performance measures and related technical elements (e.g. performance metrics and targets, data sources, and frequencies for data collection) in accordance with Treasury Board policies and Treasury Board Secretariat guidance and directives;
3. Advising on the capacities, skills and resources needed in federal organizations to create, implement and maintain on-going performance measurement systems at the level of the organization as a whole or at the program, initiative or project level;
4. Advising on conceptual frameworks, methodological approaches and designs for performance measurement of and evaluation of projects, programs, services, organizations/institutions, policies and initiatives in those fields;
5. Providing field-specific performance measurement advice (e.g. support managers to identify, track and report on results throughout the life cycle of projects, programs, services, policies or initiatives), including providing training or information sessions to build capacity within organization and assist program management with the collection and interpretation of performance measurement data;
6. Analyzing and/or interpreting performance data and preparing performance reports;
7. Researching field-specific performance measurement uses and practices in other jurisdictions (includes provincial and international jurisdictions);
8. Conducting comparative analysis and advising on best practices, including benchmarking performance, international comparisons and case studies;
9. Providing subject-matter advice to assist in the:
  - Assessment of the readiness of a policy, program or initiative to be evaluated;
  - Scoping and planning of specific evaluations or related studies of individual programs, policies or initiatives;
  - Preparation of logic models, program theories, literature reviews or assessment tools;
  - Constructing of work plans, including evaluation planning reports or frameworks and associated methodologies;
  - Developing, testing and implementing of evaluation methods and data collection tools;
  - Collection and analysis of relevant data (including socio-economic and statistical);
  - Assessment of relevance and performance, including impacts, efficiency and cost-effectiveness of programs, policies or initiatives;

## Annex A Requirement

- Assessment of program governance and management (including assessing risk management and controls, decision-making, planning, development and implementation, transparency and accountability);
  - Developing evaluation reports containing findings, conclusions and recommendations, and undertake report validation and consultations where appropriate and requested;
  - Conducting and writing of synthesis or meta-evaluations;
  - Compilation, analysis and dissemination of findings, lessons learned and best practices;
  - Briefing of program and senior management on major results and findings, including preparation of presentations;
  - Development of other materials, documents, tools and instruments related to the work; and
  - Review of the components of evaluations such as primary and secondary data collection activities, surveys, special studies, literature or document reviews, applied statistical analysis and the development of background or analytical discussion papers on program theory and/or alternatives.
10. Validating evaluation approaches, methodologies, findings, conclusions and recommendations, using methods such as (but not limited to) validation from a technical expert standpoint;
  11. Participating on peer review or similar panels for evaluations or act as a third-party reviewer of draft evaluation products;
  12. Advising on sensitivities in their specific fields (e.g. on working with groups of 'at-risk' stakeholders) and issues related to ethics and values related to performance measurement and evaluation; and
  13. Facilitating connection to other key experts in the field as required for performance measurement or evaluation purposes.

### SUBJECT MATTER EXPERT FLEXIBLE GRID

#### Levels of Expertise

|              |                       |
|--------------|-----------------------|
| Senior       | <b>Minimum 75 pts</b> |
| Intermediate | <b>Minimum 65 pts</b> |
| Junior       | <b>Minimum 55 pts</b> |

#### Relevant Education to the Consultant Category

|                           |        |
|---------------------------|--------|
| Graduate degree or higher | 35 pts |
| Undergraduate degree      | 25 pts |

#### Relevant Experience in Consultant Category

|                    |               |        |
|--------------------|---------------|--------|
| ≥2 yrs and <4 yrs  | 24-47 months  | 20 pts |
| ≥4 yrs and <6 yrs  | 48-71 months  | 30 pts |
| ≥6 yrs and <10 yrs | 72-119 months | 35 pts |
| ≥10 yrs            | 120 + months  | 50 pts |

**As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.**

### 2.15 LIFE CYCLE MANAGEMENT SPECIALIST

**The required services may include, but are not limited to the following:**

1. conducting engineering studies and analysis to provide technical solutions to stated technical/logistic or operational requirements/problems including preparation of Engineering Changes (ECs);
2. defining standards and criteria related to equipment or systems maintenance;
3. preparing, modifying or updating specifications and drawings;
4. onverting specifications and drawings to current standards or electronic formats;
5. preparing, modifying or updating Technical Instructions and Orders;
6. evaluating existing systems;
7. performing configuration management;
8. performing analysis of maintenance, repair and overhaul data;

## Annex A Requirement

9. investigating Unsatisfactory Condition Reports (UCRs) and Technical Failure Reports (TFRs);
10. preparing technical statements of requirement, draft specifications and purchase descriptions;
11. preparing data for initial provisioning and repair parts scaling;
12. reviewing the design, development, manufacture, installation and testing of prototype modifications;
13. preparing repair procedures, maintenance schedules and technical data;
14. preparing life-cycle cost estimates;
15. preparing support cost option analysis for systems and equipment;
16. planning, developing, implementing and administrating a data management system;
17. performing independent verification and validation services for equipment engineering projects;
18. providing studies and recommendations on application software development standards, methodologies and tools appropriate for the development and maintenance of related software systems;
19. reviewing Repairable Arising Control sheets (RAC) for technical content and making recommendations;
20. reviewing and updating material/equipment specifications; and
21. reviewing disposal certificates, making appropriate recommendations, updating maintenance handbooks, parts list and operating manuals.

**As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.**

### **2.16 FACILITATOR CONSULTANT**

**The required services may include, but are not limited to the following:**

1. Encouraging group members to participate and interact productively and guide the group through an effective process;
2. Facilitating strategic and operational planning;
3. Facilitating team building sessions;
4. Facilitating knowledge transfer, coaching and skills development;
5. Utilizing tools and techniques to engage participation such as (but not limited to) brainstorming session, role playing, walk-thrus,;
6. Facilitating large and small groups;
7. Providing electronic facilitation services;
8. Moderating group discussions;
9. Stimulating a constructive and clear exchange of ideas among the members and promoting feedback;
10. Redirecting group members to carry on with an interaction when tangents occur.
11. Timekeeping to ensure that the planned agenda is completed prior to the end of the allotted time or in accordance with an agreed to modifications by the group
12. Guiding a group to consensus and desired outcomes
13. Planning and preparation of the session such as understanding the clients needs, predefine the approach and techniques to be used and develop event plan;
14. Promoting group participation, mutual understanding and shared responsibilities among the group by fostering open participation with respect for client culture, norms and participant diversity
15. Providing end to end facilitation which may involve physical arrangements, delegating program committees, visual materials, defining the agenda, establishing goals, structure and strategy of the sessions, closeout activities
16. Draft and finalize reports on the results and conclusions of facilitated sessions and prepare and deliver presentations based on facilitated sessions such as lessons learned reports
17. Working with different levels of hierarchy within an Organization on a national level

### **FACILITATOR FLEXIBLE GRID**

#### **Levels of Expertise**

**Annex A  
Requirement**

|  |                                     |
|--|-------------------------------------|
| Level 3 (Senior)   | <b>Minimum 95 pts</b>               |
| Level 2 (Intermediate)   | <b>Minimum 70 pts</b>               |
| Level 1 (Junior)   | <b>Minimum 50 pts</b>               |
| <b>Relevant Education to the Consultant Category</b>   |                                     |
| University   | 30 pts                              |
| College or CEGEP Diploma / Certificate.  | 25 pts                              |
| Formalized Training (examples of formalized training but not limited to, Recognized Mediation Certifications, CTDP Certified Training and Development Professional, Training Certifications from accredited Institutions, ANSI - Association for Challenge Course Technology, Certified Online Facilitation) | 20 pts                              |
| Secondary School   | 15 pts                              |
| <b>Professional Certification</b>  |                                     |
| Relevant Professional Certification  | 10 pts                              |
| <b>Relevant Experience in Consultant Category : Range of years is based on a minimum of 3 completed facilitation events within one calendar year</b>   |                                     |
| ≥1 yr and <2 yrs   | ≥3 events and <6 events<br>10 pts   |
| ≥2 yrs and <4 yrs  | ≥6 events and <12 events<br>20 pts  |
| ≥4 yrs and <6 yrs  | ≥12 events and <18 events<br>25 pts |
| ≥6 yrs and <8 yrs  | ≥18 events and <24 events<br>40 pts |
| ≥8 yrs and <10 yrs   | ≥24 events and <30 events<br>55 pts |
| ≥10 yrs  | ≥30 events<br>70 pts                |
| ≥15 yrs  | ≥45 events<br>80 pts                |

## Annex A Requirement

### 3. PROJECT MANAGEMENT SERVICES STREAM

#### Project Management Services Stream Flexible Grid

The flexible grid applied to all consultant categories of the Project Management Services Stream, unless otherwise specified.

| <b>PROJECT MANAGEMENT SERVICES STREAM FLEXIBLE GRID</b> |  |               |                       |
|---|--|---------------|-----------------------|
| <b>Levels of Expertise</b>                              |  |               |                       |
|   | Senior   |               | <b>Minimum 95 pts</b> |
|   | Intermediate                                       |               | <b>Minimum 70 pts</b> |
|   | Junior   |               | <b>Minimum 50 pts</b> |
| <b>Relevant Education to the Consultant Category</b>    |  |               |                       |
|   | University (PhD, Graduate, Undergraduate, degree). |               | 35 pts                |
|   | College or CEGEP Diploma / Certificate.            |               | 25 pts                |
| <b>Professional Certification</b>                       |  |               |                       |
|   | Relevant Professional Certification                |               | 15 pts                |
| <b>Relevant Experience in Consultant Category</b>       |  |               |                       |
|   | ≥1 yr and <2yrs                                    | 12-23 months  | 10 pts                |
|   | ≥2 yrs and <4yrs                                   | 24-47 months  | 20 pts                |
|   | ≥4 yrs and <6yrs                                   | 48-71 months  | 25 pts                |
|   | ≥6 yrs and <8 yrs                                  | 72-95 months  | 35 pts                |
|   | ≥8 yrs and <10 yrs                                 | 96-119 months | 50 pts                |
|   | ≥10 yrs  | 120 + months  | 60 pts                |

#### 3.1 PROJECT ADMINISTRATOR

The required services may include, but are not limited to the following:

1. Assisting project team in all management activities including financial, planning and contracting aspects;
2. Providing administrative and technical support of a clerical nature as required to a project team;
3. Assisting in performing such tasks as maintaining project documentation and records;
4. Acting as the first point of contact in a "hot-line" situation by accepting incoming calls, logging calls, attempting to resolve simple problems and following established procedures for more difficult problems;
5. Tracking project change requests;
6. Maintaining and updating relevant project information in manual and/or electronic files; project information might include such things as project activity schedule, status reports, correspondence;
7. Communicating with project management a on administrative matters related to the project;
8. Assisting in the preparation and coordination of documentation in response to scheduled and unscheduled reports, returns and observations to update management of project progress;
9. receiving incoming mail (both hard copy and e-mail), prioritizes, assesses urgency, sets deadlines;
10. developing/maintaining bring forward (BF) and other control systems for action items;
11. researching and locating background information, analyzes, extracts relevant information and writes summaries; and
12. maintaining and tracking financial transactions, enters commitments and expenditures into the projects financial budget.

#### **PROJECT ADMINISTRATOR CONSULTANT FLEXIBLE GRID**

##### **Levels of Expertise**

## Annex A Requirement

|  |                       |        |
|--|-----------------------|--------|
| Senior   | <b>Minimum 90 pts</b> |        |
| Intermediate   | <b>Minimum 70 pts</b> |        |
| Junior   | <b>Minimum 55 pts</b> |        |
| <b>Relevant Education to the Consultant Category</b> |                       |        |
| College or CEGEP Diploma / Certificate.              | 30 pts                |        |
| High School Diploma.                                 | 20 pts                |        |
| <b>Professional Certification</b>                    |                       |        |
| Relevant Professional Certification                  | 15 pts                |        |
| <b>Relevant Experience in Consultant Category</b>    |                       |        |
| ≥1 yr and <2 yrs                                     | 12-23 months          | 10 pts |
| ≥2 yrs and <4 yrs                                    | 24-47 months          | 20 pts |
| ≥4 yrs and <6 yrs                                    | 48-71 months          | 25 pts |
| ≥6 yrs and <8 yrs                                    | 72-95 months          | 35 pts |
| ≥8 yrs and <10 yrs                                   | 96-119 months         | 50 pts |
| ≥10 yrs  | 120 + months          | 60 pts |

### **3.2 PROJECT MANAGER**

**The required services may include, but are not limited to the following:**

1. Planning and coordinating project management activities including financial, planning and contracting aspects;
2. Planning and organizing a project management office;
3. Giving briefings on progress and concerns of project;
4. Coordinating and preparing documentation in response to scheduled and unscheduled reports, returns and observations to update management on project progress;
5. Planning and coordinating the activities of project personnel, internal customers, contractors and other support providers;
6. Preparing formal work breakdown structure and compliance charts;
7. Producing draft plans and sections for incorporation into the Project Implementation Plan;
8. Preparing draft evaluation plans, criteria and evaluation schedules;
9. Developing, planning, analyzing, evaluating and prioritizing deliverables and requirements;
10. Defining and documenting development team objectives;
11. Determining and obtaining budgetary requirements, composition, roles, responsibilities and terms of reference for the team;
12. Planning, directing and controlling the activities of a project team within scheduled time and cost parameters;
13. Monitoring the design, implementation and operations start up of the project against established goals, objectives and milestones;
14. Reporting progress of the project on an ongoing basis and at scheduled points in the life cycle;
15. Meeting with stakeholders and other project managers and stating problems in a form capable of being solved;
16. Preparing plans, charts, tables and diagrams to assist in analyzing or displaying problems;
17. Working with a variety of project management tools;
18. Formulating and managing project plans by defining deliverables, identifying key milestones, reviewing project progress, and engaging in ongoing risk management;
19. Coordinating and directing project team(s) in order to meet project objectives for content, quality, costs, and schedules;
20. Ensuring management staff is provided with timely and accurate project information and status updates
21. Developing project control and reporting procedures and managing changes in operational plan;
22. Conducting post project reviews / lessons learned;
23. Contributing to the organization's strategic and business planning initiatives (*e.g., identifying strategic goals and objectives and implementing initiatives to achieve them, Policy Development,*

## Annex A Requirement

|  |               |                        |
|--|---------------|------------------------|
| <i>Standards Development and Program Review)</i>   |               |                        |
| 24. Assuming leadership at the appropriate phases of planning, action, and evaluation;   |               |                        |
| 25. Recognizing and taking action on opportunities to combine professional resources through partnering arrangements (e.g., multi-disciplinary practices); |               |                        |
| 26. Contributing to development of organizational vision and mission; and  |               |                        |
| 27. Coordinates, drafts and prepares for signature formal project documents and reports.   |               |                        |
| <b>PROJECT MANAGER CONSULTANT FLEXIBLE GRID</b>  |               |                        |
| <b>Levels of Expertise</b>   |               |                        |
| Senior   |               | <b>Minimum 100 pts</b> |
| Intermediate   |               | <b>Minimum 80 pts</b>  |
| Junior   |               | <b>Minimum 65 pts</b>  |
| <b>Relevant Education to the Consultant Category</b>   |               |                        |
| University (PhD, Graduate, Undergraduate, degree).   |               | 35 pts                 |
| College or CEGEP Diploma / Certificate.  |               | 25 pts                 |
| <b>Professional Certification</b>  |               |                        |
| Relevant Professional Certification  |               | 15 pts                 |
| <b>Relevant Experience in Consultant Category</b>  |               |                        |
| ≥1 yr and <2 yrs   | 12-23 months  | 15 pts                 |
| ≥2 yrs and <4 yrs  | 24-47 months  | 20 pts                 |
| ≥4 yrs and <6 yrs  | 48-71 months  | 30 pts                 |
| ≥6 yrs and <8 yrs  | 72-95 months  | 35 pts                 |
| ≥8 yrs and <10 yrs   | 96-119 months | 55 pts                 |
| ≥10 yrs  | 120 + months  | 65 pts                 |

### **3.3 PROJECT LEADER /EXECUTIVE**

**The required services may include, but are not limited to the following:**

1. Assessing the organization's capacity/capability to undertake and successfully deliver a project in the context of the overall program or portfolio program or portfolio priorities through strategic planning;
2. Advising Senior Management on a range of issues affecting the organization's ability to achieve the project's business objectives;
3. Assisting in the prioritization and assignment of projects within the program/portfolio;
4. Managing several Senior Project Managers, each responsible for an element of the project/program/portfolio and it's associated team (e.g. project and financial management);
5. Meeting with organizational executives to ensure all organizational (internal and external) stakeholders are committed to moving forward on the project (e.g. opportunity evaluation);
6. Formulating statements of problems; establishing procedures for the development and implementation of significant, new or modified project, program or portfolio elements to solve these problems, and obtaining approval thereof;
7. Managing the implementation of a project/program/portfolio to identify, analyze, plan, track and control progress on a continuous basis;
8. Making recommendations and providing advice for improvements and assisting in developing solutions and implementing recommendations (e.g. policy development and standards development);
9. Preparing and presenting findings, status and other relevant matters;
10. Overseeing the development of a Project Business Case (e.g. business planning and program review);
11. Managing Program changes in accordance with the change management process; and Motivating the team to ensure commitment to the program's objectives.
12. specifying the general requirements of the project;
13. developing project alternatives and identifying their administrative, economic, and technical feasibility and practicality; and associated policy and organizational change requirements;
14. planning, directing, and controlling the activities of a project team within scheduled time and cost

## Annex A Requirement

|   |               |                        |
|---|---------------|------------------------|
| parameters;   |               |                        |
| 15. producing overall project plans and obtaining approval of preliminary analysis;               |               |                        |
| 16. updating and providing briefings to upper management on progress and concerns of the project; |               |                        |
| <b>PROJECT LEADER/EXECUTIVE CONSULTANT FLEXIBLE GRID</b>  |               |                        |
| <b>Levels of Expertise</b>  |               |                        |
| Senior  |               | <b>Minimum 100 pts</b> |
| Intermediate  |               | <b>Minimum 80 pts</b>  |
| Junior  |               | <b>Minimum 65 pts</b>  |
| <b>Relevant Education to the Consultant Category</b>  |               |                        |
| University (PhD, Graduate, Undergraduate, degree).  |               | 35 pts                 |
| College or CEGEP Diploma / Certificate.   |               | 25 pts                 |
| <b>Professional Certification</b>   |               |                        |
| Relevant Professional Certification   |               | 15 pts                 |
| <b>Relevant Experience in Consultant Category</b>   |               |                        |
| ≥1 yr and <2 yrs  | 12-23 months  | 15 pts                 |
| ≥2 yrs and <4 yrs   | 24-47 months  | 20 pts                 |
| ≥4 yrs and <6 yrs   | 48-71 months  | 30 pts                 |
| ≥6 yrs and <8 yrs   | 72-95 months  | 35 pts                 |
| ≥8 yrs and <10 yrs  | 96-119 months | 55 pts                 |
| ≥10 yrs   | 120 + months  | 65 pts                 |

|   |              |                       |
|---|--------------|-----------------------|
| <b>3.4 PROJECT PLANNER</b>  |              |                       |
| <b>The required services may include, but are not limited to the following:</b>   |              |                       |
| <ol style="list-style-type: none"> <li>1. Developing and maintaining project schedules, documentation and a Master Schedule of all projects and resources if more than one project;</li> <li>2. Tracking the progress of the project including cost and schedule controls;</li> <li>3. Documenting issues and resolutions related to the project scheduler;</li> <li>4. Communicating verbally and in writing with the Project Manager and if necessary with stakeholders to input modifications to the project schedule;</li> <li>5. Communicating with the Project Manager and if necessary with stakeholders regarding project status and deliverables;</li> <li>6. Informing management of Project status and direction;</li> <li>7. Contributing to the development and management of process and procedures used in Operations; and</li> <li>8. Documenting and managing project and financial records as appropriate.</li> </ol> |              |                       |
| <b>PROJECT PLANNER FLEXIBLE GRID</b>  |              |                       |
| <b>Levels of Expertise</b>  |              |                       |
| Senior  |              | <b>Minimum 90 pts</b> |
| Intermediate  |              | <b>Minimum 70 pts</b> |
| Junior  |              | <b>Minimum 55 pts</b> |
| <b>Relevant Education to the Consultant Category</b>  |              |                       |
| College or CEGEP Diploma / Certificate.   |              | 30 pts                |
| High School Diploma.  |              | 20 pts                |
| <b>Professional Certification</b>   |              |                       |
| Relevant Professional Certification   |              | 15 pts                |
| <b>Relevant Experience in Consultant Category</b>   |              |                       |
| ≥1 yr and <2 yrs  | 12-23 months | 10 pts                |
| ≥2 yrs and <4 yrs   | 24-47 months | 20 pts                |
| ≥4 yrs and <6 yrs   | 48-71 months | 25 pts                |
| ≥6 yrs and <8 yrs   | 72-95 months | 35 pts                |

## Annex A Requirement

|                    |               |        |
|--------------------|---------------|--------|
| ≥8 yrs and <10 yrs | 96-119 months | 50 pts |
| ≥10 yrs            | 120 + months  | 60 pts |

### **3.5 QUALITY ASSURANCE / MANAGEMENT SPECIALIST**

**The required services may include, but are not limited to the following:**

1. Developing, deploying and evaluating policies, procedures, standards, initiatives, metrics, forms and tools for the quality management system;
2. Verifying and confirming if the quality management system's process assets (policies, procedures and standards) are being adhered to;
3. Leading process improvement initiatives, and facilitating/coaching teams which are performing process improvement initiatives;
4. Managing and monitoring all aspects of the Quality Management System;
5. Conducting conformance audits of the Quality Management System. Reporting results and recommending appropriate corrective actions to deal with the non-conformances;
6. Tracking and reporting on the implementation of corrective actions. Confirming that corrective actions effectively addressed the root-causes of the non-conformances;
7. Contributing to the development and implementation of an integrated approach to quality, risk and performance management for the organization;
8. Providing leadership and support to the design, implementation and evaluation of performance/quality measurements of clients products/services (Program assessment/ranking and reporting, performance measurement capacity building, business performance/excellence)
9. Using multiple Quality Management methodologies and tools to address the organization's business needs (Measurement and management of organizational performance);
10. Developing process management by application of continuous improvement methodology;
11. Preparing reports concerning the capabilities, strengths and weaknesses of the Quality Management Systems for internal or external publication which could be communicated to project management team through oral or written presentations (Basic statistical analysis techniques, questionnaire design and survey analysis. Ability to influence others, at all levels in the organization); and
12. Liaising with and interviewing quality management specialists from other organizations.

### **3.6 RISK MANAGEMENT SPECIALIST**

**The required services may include, but are not limited to the following:**

1. Conducting risk assessments and evaluating potential risk and losses;
2. Identifying project and procurement risks;
3. Reviewing and auditing claims;
4. Recommending alternative solutions, methodologies and strategies for risk mitigation and management;
5. Assisting in prioritization and assignment of risks;
6. Assisting in the development and/or implementation of Risk Management Plans;
7. Developing and managing the implementation of Risk Management Plans (safety programs) to identify, analyze, plan, track, evaluate and control project risks on a continuous basis throughout the project life cycle;
8. Coaching, mentoring and training project teams in risk mitigation techniques;
9. Developing and implementing business continuity plans;
10. Developing crisis and emergency communication and/or management planning strategies;
11. Reviewing the organization's insurance and risk management programs and making recommendations regarding coverage improvements, administration, loss control and financing mechanisms;
12. Providing leadership and support to the design, implementation and evaluation of clients products/services performance measures, risk management and risk mitigation strategies;

## Annex A Requirement

13. Documenting process improvements;
14. Preparing reports for internal or external publication (Corporate Services, Policy, Communications);
15. Liaising with and interviewing stakeholders, as required, to obtain, clarify and exchange information, in-order to co-ordinate and manage the Risk Assessment Process;
16. Identifying, confirming and documenting the risk tolerance for the process, project, program, or strategic risk and using this tolerance to guide all analysis, assessment and recommendations undertaken or produced;
17. Identifying, confirming and documenting the objectives and priorities specific to the process, project, program or strategic direction being assessed, feasibility studies;
18. Identifying relevant risks and opportunities (including, but not limited to, economic, political, operational, legal, reputation, technical, organizational, accounting, banking and social risks) that threaten the objectives and priorities;
19. Utilizing both quantitative and qualitative techniques, as appropriate, to assess the likelihood that a risk event will occur; and/or the impact if the risk event occurs;
20. Recommending a ranked-order for risks and opportunities identified;
21. Recommending and documenting suggested Risk Responses necessary to manage the likelihood and/or impact of the identified risks;
22. Performing Control Risk Assessments and analysis, which may include statistical sampling and analysis of existing controls;
23. Assisting with the on-going monitoring of risk and assisting with the implementation of risk response/mitigation strategies;
24. Preparing draft and finalized risk assessments, briefing notes, presentations and papers related to risk management, and developing and updating risk management plans; and
25. Providing advice with respect to risk management best practices and providing guidance and direction to assist in managing risk.

### **3.7 PROCUREMENT SPECIALIST**

**The required services may include, but are not limited to the following:**

1. Planning and coordinating procurement activities including financial estimates, business requirements and contracting options (project procurement management, cost and estimate Management, sole source versus RFP process,);
2. Providing briefings on progress and concerns of procurement (Contract process management);
3. Planning, coordinating, preparing and controlling documentation for procurement plan and process, depending on method of procurement;
4. Planning and coordinating the activities of project contractors and other support providers (Procurement integration in Project Management);
5. Preparing, reviewing and/or finalizing Statement of Work for potential procurement;
6. Preparing draft selection methodologies, evaluation plans, evaluation criteria (mandatory and point rated) and evaluation schedules for procurement;
7. Developing, planning, analyzing, evaluating and prioritizing deliverables and requirements (Bid evaluation);
8. Monitoring the implementation and operations of the contract against established goals, objectives and milestones;
9. Reporting progress of the contract on an ongoing basis and at scheduled points in the lifecycle;
10. Identifying potential problems and propose solutions;
11. Ensuring management staff is provided with timely and accurate project information and status updates;
12. Developing and implementing procurement control, monitoring of system contract delivery and continuing service delivery and reporting procedures and managing changes;
13. Conducting post procurement reviews and contractor evaluations / lessons learned; and
14. Leading or participating in negotiations and developing procurement process and/or business process maps.

### **PROCUREMENT SPECIALIST FLEXIBLE GRID**

## Annex A Requirement

| Levels of Expertise                           |  |                       |        |
|---|--|-----------------------|--------|
|   | Senior   | <b>Minimum 95 pts</b> |        |
|   | Intermediate                                       | <b>Minimum 70 pts</b> |        |
|   | Junior   | <b>Minimum 50 pts</b> |        |
| Relevant Education to the Consultant Category |  |                       |        |
|   | University (PhD, Graduate, Undergraduate, degree). | 35 pts                |        |
|   | College or CEGEP Diploma / Certificate.            | 25 pts                |        |
|   | High School Diploma                                | 20 pts                |        |
| Professional Certification                    |  |                       |        |
|   | Relevant Professional Certification                | 15 pts                |        |
| Relevant Experience in Consultant Category    |  |                       |        |
|   | ≥1 yr and <2yrs                                    | 12-23 months          | 15 pts |
|   | ≥2 yrs and <4yrs                                   | 24-47 months          | 25 pts |
|   | ≥4 yrs and <6yrs                                   | 48-71 months          | 35 pts |
|   | ≥6 yrs and <8 yrs                                  | 72-95 months          | 45 pts |
|   | ≥8 yrs and <10 yrs                                 | 96-119 months         | 55 pts |
|   | ≥10 yrs  | 120 + months          | 65 pts |

### **3.8 FINANCIAL SPECIALIST**

**The required services may include, but are not limited to the following:**

1. Planning and coordinating financial management activities including financial estimates and business requirements;
2. Evaluating financial management procedures;
3. Conducting cost benefit analysis and life cycle costing (Cost and estimate Management);
4. Developing business plans;
5. Developing models to carry out cost analysis of the resources required to perform specific inspections related to a project (Project Management);
6. Performing risk analysis;
7. Determining the resources required for implementation of projects such as acquisition costs, operation and maintenance costs and both recurring and non-recurring costs;
8. Assisting in developing costs for specific activities such as: direct project costs, project support overhead, corporate and administrative (C&A) overhead, costs of products and services, and other related costs (Financial accounting)
9. Planning, acquiring, and controlling the use of funds so as to meet the goals of an organization and maximize its value (Procurement integration in Project Management, contract process management);
10. Identifying an organization's financial and non-financial objectives so as to improve its performance, determining whether those objectives are being effectively achieved; and
11. Developing and modifying business cases and financial plans for the future.

### **3.9 PROJECT MONITOR**

**The required services may include, but are not limited to the following:**

1. Following-up on projects, major Crown projects and/or sensitive or complex project initiatives, where Canada requires a third party opinion.
2. Assisting project management professionals in project monitoring and coordination;
3. Providing administrative and technical support as required to the project team;
4. Participating in meetings with project management professionals and other stakeholders (internal and external) to ensure project is progressing, project goals are being met and expected results are being achieved;
5. Ensuring project and contract activities, deliverables, milestones, timelines and financial commitments are tracked and commitments are being fulfilled;

## Annex A Requirement

|  |               |   |                       |
|--|---------------|---|-----------------------|
| <ol style="list-style-type: none"> <li>6. Communicating and coordinating meetings with project management professionals and other executive and customer stakeholders on matters related to the project;</li> <li>7. Performing a liaison role amongst all project management, executives and customer stakeholders;</li> <li>8. Preparing monthly, quarterly, yearly financial and project reports and other project monitoring reports to management and executives; and</li> <li>9. Preparing annual reports, project progress reports, results achieved reports, lesson learned documentation and recommendations for improvement documentation at the executive level.</li> </ol> |               |   |                       |
| <b>PROJECT MONITOR CONSULTANT FLEXIBLE GRID</b>  |               |   |                       |
| <b>Levels of Expertise</b>   |               |   |                       |
|  |               | Senior                                  | <b>Minimum 60 pts</b> |
|  |               | Intermediate                            | <b>Minimum 50 pts</b> |
|  |               | Junior                                  | <b>Minimum 30 pts</b> |
| <b>Relevant Education to the Consultant Category</b>   |               |   |                       |
|  |               | College or CEGEP Diploma / Certificate. | 25 pts                |
|  |               | High School Diploma.                    | 20 pts                |
| <b>Relevant Experience in Consultant Category</b>  |               |   |                       |
| ≥1 yr and <2 yrs   | 12-23 months  | 10 pts                                  |                       |
| ≥2 yrs and <4 yrs  | 24-47 months  | 25 pts                                  |                       |
| ≥4 yrs and <6 yrs  | 48-71 months  | 35 pts                                  |                       |
| ≥6 yrs and <8 yrs  | 72-95 months  | 40 pts                                  |                       |
| ≥8 yrs and <10 yrs   | 96-119 months | 45 pts                                  |                       |
| ≥10 yrs  | 120 + months  | 50 pts                                  |                       |

### **3.10 TECHNICAL WRITER**

**The required services may include, but are not limited to the following:**

1. Analyzing material, such as specifications (technical Statement of Work/Requirement), notes, drawings, writing manuals, user guides and other documents to explain the requirement clearly and concisely;
2. Modifying, validating and compiling documents such as technical publications in general, specifications, equipment and system data lists, drawings etc.;
3. Gathering information, analyzing the subject and the audience, and producing clear documentation;
4. Studying existing material and interviewing Stakeholders;
5. Creating accurate, complete and concise documentation to communicate the needs of the requirement;
6. Assimilating and conveying technical material in a concise, effective manner;
7. Following governmental publishing guidelines; and
8. Reviewing documents, drawings and associated data for conformance to established standards.
9. planning, researching and writing manuals, specifications and other non-journalistic articles;
10. design the layout of the documents/manuals;
11. uses word-processing, desk-top publishing and graphics software packages to produce final camera ready copy.

**As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.**

## Annex A Requirement

### **3.11 COMMUNICATIONS CONSULTANT**

**The required services may include, but are not limited to the following:**

1. Planning, researching, modifying, assisting, writing and/or reviewing memos, scripts, plays, essays, speeches, manuals and other non-journalistic articles with conformance to established standards;
2. Developing and implementing strategic communication plans in geographically dispersed organizations going through an organizational transformation (change management);
3. Providing communications consultation advice to support strategic communications initiatives and strategies;
4. Creating communications support materials;
5. Developing and implementing creative communication and information products using a variety of tools, techniques and media and selecting an appropriate medium to convey information, ideas, and results;
6. Developing and implementing communication strategies and plans;
7. Evaluating the outcomes of business activities and processes against objectives and benchmarks, and advising on further action (*e.g., conducting and reporting on gap analysis*);
8. Researching, proposing, and implementing models to enhance the effectiveness of performance measures and standards in relation to an organization's strategic plan;
9. Coordinating the implementation of performance measures and standards;
10. Establishing a performance measurement architecture to ensure that local performance measures are linked to strategic goals and corporate objectives;
11. Designing, evaluating, and reporting on internal control systems to ensure that management information is complete and accurate (*e.g., assessing integrity of reporting system*);
12. Expressing and exchanging information in a clear and concise manner;
13. Ensuring information is communicated to the appropriate people in a timely manner;
14. Preparing reports for specific purposes using clear, communicative, and professional language (*e.g., audit reports, management letters, consulting reports, financial reports*);
15. Ensuring communications are clearly understood by encouraging and listening to feedback both internally and externally in the organization;
16. Structuring external communications to project an appropriate corporate image;
17. Ensuring confidentiality with respect to organizational or client information and data.
18. Determine target audiences in order to better develop messages;
19. Identify and determine communications impediments and barriers;
20. Evaluate impacts and benchmark data; and
21. Provide advice on matters relating to policy/program development approaches or options and communications planning alternatives (internal or external)

## Annex A Requirement

### **4. REAL PROPERTY PROJECT MANAGEMENT SERVICES STREAM**

**Please note:** Services relating to Real Property fall under the umbrella of services offered to other government departments by Public Works and Government Services Canada (PWGSC) in its role as common service agency, as defined in the PWGSC Act (see section 5 and subsection 6(f) for further information). It is therefore strongly recommended that PWGSC's Real Property Branch be consulted before proceeding with any requirements that fall under Stream 4: Project Management for Real Property.

#### **Real Property Project Management Services Stream Flexible Grid**

This flexible grid is applied to all consultant categories of the Real Property Project Management Services Stream, unless otherwise specified.

| <b>REAL PROPERTY PROJECT MANAGEMENT SERVICES STREAM FLEXIBLE GRID</b> |  |               |                       |
|---|--|---------------|-----------------------|
| <b>Levels of Expertise</b>  |  |               |                       |
|   | Senior   |               | <b>Minimum 95 pts</b> |
|   | Intermediate                                       |               | <b>Minimum 70 pts</b> |
|   | Junior   |               | <b>Minimum 50 pts</b> |
| <b>Relevant Education to the Consultant Category</b>                  |  |               |                       |
|   | University (PhD, Graduate, Undergraduate, degree). |               | 35 pts                |
|   | College or CEGEP Diploma / Certificate.            |               | 25 pts                |
| <b>Professional Certification</b>                                     |  |               |                       |
|   | Relevant Professional Certification                |               | 15 pts                |
| <b>Relevant Experience in Consultant Category</b>                     |  |               |                       |
|   | ≥1 yr and <2 yrs                                   | 12-23 months  | 10 pts                |
|   | ≥2 yrs and <4 yrs                                  | 24-47 months  | 20 pts                |
|   | ≥4 yrs and <6 yrs                                  | 48-71 months  | 25 pts                |
|   | ≥6 yrs and <8 yrs                                  | 72-95 months  | 35 pts                |
|   | ≥8 yrs and <10 yrs                                 | 96-119 months | 50 pts                |
|   | ≥10 yrs  | 120 + months  | 60 pts                |

#### **4.1 PROJECT ADMINISTRATOR FOR REAL PROPERTY**

**The required services may include, but are not limited to the following:**

1. Assisting project team in management activities including financial, planning and contracting aspects;
2. Providing financial administrative support to suit requirements;
3. Assisting with security clearance process;
4. Establishing project administration procedures;
5. Providing administrative and technical support of a clerical nature as required to a project team;  
Developing document and records management system and control process for project teams;  
Receiving incoming mail (both hard copy and e-mail), prioritizes and assesses urgency of mail and sets deadlines;
6. Acting as the first point of contact in a "hot-line" situation by accepting incoming calls, logging calls, attempting to resolve simple problems and following established procedures for more difficult problems;
7. Participating at project meetings, preparing/distributing minutes and records of decision;
8. Providing comprehensive project planning and monitoring, reporting using project plan format;
9. Maintaining and updating relevant project information in manual and/or electronic files; project information might include such things as project activity schedule, status reports, correspondence;
10. Communicating with project management on administrative matters related to the project;

## Annex A Requirement

|   |               |                       |
|---|---------------|-----------------------|
| 11. Assisting with the review of project requirements with specialists, other jurisdictional authorities and stakeholders;  |               |                       |
| 12. Assisting in the preparation and coordination of documentation in response to scheduled and unscheduled reports to update management of project progress; Providing technical writing support for written reports and presentation decks;           |               |                       |
| 13. Assisting in managing request for information (RFI) procedures;   |               |                       |
| 14. Providing support to tendering and contracting processes as requested; Supporting start-up construction process (preparation & meeting) by assisting in managing construction logistics: forecast, coordinate work, avoid disruptions to occupants; |               |                       |
| 15. Providing support in the preparation of timely and accurate Contemplated Change Notices (CCN's) and Change Orders (CO's) for approval, tracking and communications; and   |               |                       |
| 16. Supporting post-construction services and post-construction evaluations.  |               |                       |
| <b>PROJECT ADMINISTRATOR FOR REAL PROPERTY FLEXIBLE GRID</b>  |               |                       |
| <b>Levels of Expertise</b>  |               |                       |
| Senior  |               | <b>Minimum 95 pts</b> |
| Intermediate  |               | <b>Minimum 70 pts</b> |
| Junior  |               | <b>Minimum 50 pts</b> |
| <b>Relevant Education to the Consultant Category</b>  |               |                       |
| College or CEGEP Diploma / Certificate.   |               | 35 pts                |
| High School Diploma   |               | 25 pts                |
| <b>Professional Certification</b>   |               |                       |
| Relevant Professional Certification   |               | 15 pts                |
| <b>Relevant Experience in Consultant Category</b>   |               |                       |
| ≥1 yr and <2 yrs  | 12-23 months  | 10 pts                |
| ≥2 yrs and <4 yrs   | 24-47 months  | 20 pts                |
| ≥4 yrs and <6 yrs   | 48-71 months  | 25 pts                |
| ≥6 yrs and <8 yrs   | 72-95 months  | 35 pts                |
| ≥8 yrs and <10 yrs  | 96-119 months | 50 pts                |
| ≥10 yrs   | 120 + months  | 60 pts                |

### **4.2 PROJECT MANAGER FOR REAL PROPERTY**

**The required services may include, but are not limited to the following:**

**Part A:**

1. Developing project scope, requirement documents, statement of work, participating in client discussions, analysis of functional and operational requirements of the client;
2. Preparation of project approval documents (e.g. business cases, feasibility studies, Treasury Board submissions) required for funding or project approval;
3. Planning and coordinating the activities of project personnel, contractors or other support providers, including the preparation of preliminary time schedules for project design and implementation; and
4. Managing architectural/engineering and associated specialists teams, reviewing project costs and resolving variances with predetermined budgets by recommending action and resolving conflicts.

**Part B:**

5. Planning, directing and coordinating a project management office and its activities within time and cost parameters;
6. Preparing formal work breakdown structure and compliance charts;
7. Producing draft plans and sections for incorporation into Project Plans;
8. Contributing to the organization's strategic and business planning initiatives (e.g., identifying strategic goals and implementing initiatives to achieve them (such as through policy development, standards development and program review);
9. Recognizing and taking action on opportunities to combine professional resources through partnering

## Annex A Requirement

- arrangements (e.g., multi-disciplinary practices);
10. Planning facilitation workshops that address strategic planning, teambuilding, positive-centred learning or conflict management, conducting stakeholder interviews. Preparing workshop material, facilitating the workshop, and on-going partnering process management;
  11. Preparing or managing of project documents, such as project charter or plan, client statement of work, investment analysis report, feasibility study, terms of reference, value engineering, lifecycle analysis, commissioning plan or lessons learned;
  12. Establishing and reviewing project and construction implementation strategies including, lump sum, phased, construction management, design-build and public-private partnerships;
  13. Coordinating consultants retained separately to ensure an integrated design (for example, geotechnical, seismic and environmental designs, functional program and fit-up/office planning);
  14. Briefing consultants and contractors on roles, responsibilities and guidelines for contract administration and on-site behavior;
  15. Developing an updated Project Plan, noting constraints, assumptions, inclusions and exclusions after review with stakeholders;
  16. Coordinating Value Engineering exercises or other strategies aimed at integrated design solutions and cost management; ensuring the review and implementation of outcomes from these processes;
  17. Maintaining the design change management process that records changes to the scope of work;
  18. Monitoring the design, implementation and operations of the project against established goals;
  19. Reporting progress of the project on an ongoing basis;
  20. Assisting in the preparation of recommendations to engage or commission consultants, preparing consultant Request for Proposal (RFP) documents and reviewing and evaluating consultant proposals;
  21. Reviewing monthly progress claims from consultants for compliance with consultant agreements and recommending payments;
  22. Analyzing project schedules including contractor or consultant deliverables and determining whether corrective action is required to meet deadlines;
  23. Attending construction site meetings, providing input on interpretation of contract plans and specifications while ensuring that consultants or contractors fulfill their responsibilities under their respective agreements;
  24. Preparing plans, charts, tables and diagrams to assist in analyzing or displaying problems;
  25. Managing and planning moves, including furniture coordination, cabling and signage procurement and verification;
  26. Coordinating and preparing documentation in response to scheduled and unscheduled reports, returns and observations to update management on project progress;
  27. At substantial completion, participating in inspections or acceptance boards: inspecting the work, evaluating amounts withheld due to deficiencies, accepting the work on behalf of client, recommending issuance of the interim certificate and payment to the contractor;
  28. Incorporating final reports into the Project Plan, including details of outstanding issues, warranties and obligations of consultants or contractors, posting project reviews and lessons learned;
  29. Ensuring that deficiencies and incomplete work are identified, managed, corrected and accepted as complete promptly; recommending issuance of final completion certificate; and
  30. Developing and maintaining various systems for the management and control of the project in a manner compatible with client standards and guidelines. This includes financial, approval tracking, change management, communications, security protocol for project staff and records management system.

| <b>PROJECT MANAGER FOR REAL PROPERTY FLEXIBLE GRID</b> |                        |
|--|------------------------|
| <b>Levels of Expertise</b>                             |                        |
| Senior   | <b>Minimum 100 pts</b> |
| Intermediate   | <b>Minimum 80 pts</b>  |
| Junior   | <b>Minimum 65 pts</b>  |
| <b>Relevant Education to the Consultant Category</b>   |                        |
| University (PhD, Graduate, Undergraduate, degree).     | 35 pts                 |
| College or CEGEP Diploma / Certificate.                | 25 pts                 |
| <b>Professional Certification</b>                      |                        |
| Relevant Professional Certification                    | 15 pts                 |

## Annex A Requirement

| Relevant Experience in Consultant Category |               |        |
|--|---------------|--------|
| ≥1 yr and <2 yrs                           | 12-23 months  | 10 pts |
| ≥2 yrs and <4 yrs                          | 24-47 months  | 20 pts |
| ≥4 yrs and <6 yrs                          | 48-71 months  | 30 pts |
| ≥6 yrs and <8 yrs                          | 72-95 months  | 35 pts |
| ≥8 yrs and <10 yrs                         | 96-119 months | 55 pts |
| ≥10 yrs                                    | 120 + months  | 65 pts |

### **4.3 PROJECT LEADER FOR REAL PROPERTY**

**The required services may include, but are not limited to the following:**

1. Assessing the organization's capability to undertake and successfully deliver a project in the context of the overall program or portfolio priorities through strategic planning;
2. Specifying the general requirements of the project: developing, verifying and gaining acceptance of the project scope, budget, schedule and scope change control;
3. Assisting in the prioritization and assignment of projects within a larger program or portfolio of projects;
4. Managing several Senior Project Managers, each responsible for an element of the project or program or portfolio and its associated team (e.g. project and financial management);
5. Identifying and assigning project roles, responsibilities and reporting relationships, developing work plans, ensuring adequate human resources, and developing a productive team environment;
6. Providing advice and leadership in the development and assessment of potential options on project development, recommending a preferred option and developing an implementation strategy through the preparation of a business case or feasibility study;
7. Meeting, negotiating and gaining support from internal and external organizational stakeholders (e.g. senior government executives, private-sector interests, municipal interests, community groups, etc.);
8. Developing project alternatives and identifying their administrative, organizational, economic, or technical feasibility;
9. Assisting in obtaining required project approvals from relevant stakeholders (internal approval, zoning, heritage, etc.) including the review and interpretation of municipal by-laws;
10. Undertaking due diligence activities for the acquisition or disposal of property (e.g. highest & best use studies, site selection studies);
11. Developing real property master plans, detailed site development plans or land use plans analyzing development initiatives (e.g. transportation or servicing studies, analysis of traffic, parking, pedestrian activity, transportation demand management or other urban planning issues);
12. Preparing offer call documents to be used in property acquisition or disposal;
13. Examining and making recommendations concerning land title issues;
14. Identifying, obtaining and managing environmental approvals, permits or licenses;
15. Managing the implementation of a project or program to identify, analyze, plan, track and control progress on a continuous basis;
16. Reviewing and accepting (or requesting changes to) the overall planning, design development and implementation process, including feasibility, environmental, infrastructure, conceptual designs, the associated class of cost estimate, project scheduling project changes, issues management and approval documents;
17. Preparing life-cycle cost estimates using the discounted cash-flow method and sensitivity analysis;
18. Managing program changes in accordance with the change management process;
19. Developing risk management plans;
20. Managing safety as an integrated part of the construction project following accountability frameworks and documentation to ensure consistency of practice and due diligence;
21. Developing a Communications Plan that outlines the claims resolution process;
22. Developing a Communications Plan, press releases and questions and answers to media lines of inquiry;
23. Assisting in organizing media events or building tours for the public or senior management; and

## Annex A Requirement

|   |               |                        |
|---|---------------|------------------------|
| 24. Producing camera-ready graphics of communication material or information panels for on-site exposition. |               |                        |
| <b>PROJECT LEADER FOR REAL PROPERTY FLEXIBLE GRID</b>   |               |                        |
| <b>Levels of Expertise</b>  |               |                        |
| Senior  |               | <b>Minimum 100 pts</b> |
| Intermediate  |               | <b>Minimum 80 pts</b>  |
| Junior  |               | <b>Minimum 65 pts</b>  |
| <b>Relevant Education to the Consultant Category</b>  |               |                        |
| University (PhD, Graduate, Undergraduate, degree).  |               | 35 pts                 |
| College or CEGEP Diploma / Certificate.   |               | 25 pts                 |
| <b>Professional Certification</b>   |               |                        |
| Relevant Professional Certification   |               | 15 pts                 |
| <b>Relevant Experience in Consultant Category</b>   |               |                        |
| ≥1 yr and <2 yrs  | 12-23 months  | 10 pts                 |
| ≥2 yrs and <4 yrs   | 24-47 months  | 20 pts                 |
| ≥4 yrs and <6 yrs   | 48-71 months  | 30 pts                 |
| ≥6 yrs and <8 yrs   | 72-95 months  | 35 pts                 |
| ≥8 yrs and <10 yrs  | 96-119 months | 55 pts                 |
| ≥10 yrs   | 120 + months  | 65 pts                 |

### **4.4 PROJECT PLANNER FOR REAL PROPERTY**

**The required services may include, but are not limited to the following:**

**Part A:**

1. Identifying project activities and creating and maintaining the project schedule, establishing a time control system, monitoring progress (including cost and schedule controls) and responding to variances;
2. Formulating and maintaining master schedule of all activities and resources by defining deliverables, identifying key milestones and deadlines, reviewing project progress, and engaging in ongoing risk management. Identify (seasonal, site or client) specific impacts on timelines, timelines for work processes and approval periods to master schedule;
3. Developing detailed cash flows as the project progresses to illustrate the sequencing of work and the inter-related activities; and
4. Communicating verbally and in writing with the Project Manager and with stakeholders to input modifications to the project schedule or the project Work Breakdown Structure.

**Part B:**

5. Visiting the site and providing timely input to update the Master Schedule Plan;
6. Preparing an optimized project schedule, using Critical Path Methodology, to identify measures to shorten total project duration;
7. Reviewing and monitoring overall project schedule on a regular basis using information provided from the project team; mitigate schedule delays as required.
8. Maintaining schedule tracking and change management records;
9. Documenting issues and resolutions related to the project schedule;
10. Communicating with the Project Manager, management team or stakeholders regarding project status and deliverables using logic diagrams, bar charts and narrative reports; and
11. Contributing to the development and management of process and procedures used in operations.

### **4.5 FINANCIAL/COST SPECIALIST FOR REAL PROPERTY**

**The required services may include, but are not limited to the following:**

## Annex A Requirement

### Part A:

1. Preparing a cost and cash flow estimate (eg., identifying the resources, levels of effort and related costs) required for the project;
2. Forecasting costs for specific activities such as: direct project costs, project support overhead, corporate or administrative overhead, costs of products and services, leasing costs;
3. Assisting with cost control using problem solving techniques such as life-cycle analysis, value engineering, risk analysis or early estimation (elemental cost analysis);
4. Analyzing trends in the real estate or construction markets and forecasting the impact of such trends on project costs;
5. Monitoring actual or expected costs against previously budgeted costs and preparing variance analysis (e.g. analyzing and reporting on costs to complete projects and actions to be taken to stay on budget including the state of risk allowances, reserves or contingencies);
6. Preparing discounted cash-flow analysis including sensitivity analysis;
7. Preparing value-for-money calculations using Monte Carlo Simulation;
8. Preparing historic or pro forma financial statement or ratio analysis (based on financial, employment, spatial or other data); and
9. Providing a review of a financial analysis prepared by a different party.

### Part B:

10. Evaluating financial management procedures;
11. Reviewing submissions prepared by consultants or contractors relevant to financial activities;
12. Developing business plans or financial plans;
13. Providing input to update the Master (baseline) Cost Plan through:
  - Site inspections;
  - Assessing the project design and budgets;
  - Ensuring a common understanding of all contingencies or allowances; and
  - Comparing and reconciling previous project budgets with the current budget.
14. Providing approved budget, forecast, variances, actuals, billings, payments;
15. Assisting with cost planning including:
  - Participating in cost planning of project options and “what if” scenarios;
  - Providing advice on cost planning in order to coordinate ongoing project procurement activities with information within the organization’s financial system;
  - Identifying and quantifying potential risks and making contingency recommendations in order to minimize negative cost impacts; and
  - Identifying, forecasting and analyzing project related risks focusing on the presentation, documentation and use of risk allowances or risk reserves or general contingencies.
16. Developing a detailed worksheet of sub-project annual funding, forecasts, value of work done over the life of the project;
17. Reviewing and monitoring overall project budget on a regular basis using information provided from the project team;
18. Highlighting variances and possible mitigation strategies to bring project costs back into budget;
19. Providing regular reports of project cash flow, including forecasted requirements on an as-required basis; and
20. Evaluating or applying governmental or industry (i.e. Generally Accepted Accounting Principles) methods in financial decision making as they relate to real property.

### **FINANCIAL/COST SPECIALIST FOR REAL PROPOERTY FLEXIBLE GRID**

#### **Levels of Expertise**

|              |                        |
|--------------|------------------------|
| Senior       | <b>Minimum 100 pts</b> |
| Intermediate | <b>Minimum 80 pts</b>  |
| Junior       | <b>Minimum 65 pts</b>  |

#### **Relevant Education to the Consultant Category**

|  |        |
|--|--------|
| University (PhD, Graduate, Undergraduate, degree). | 35 pts |
| College or CEGEP Diploma / Certificate.            | 25 pts |

#### **Professional Certification**

## Annex A Requirement

|   |               |        |
|---|---------------|--------|
| Relevant Professional Certification               |               | 20 pts |
| <b>Relevant Experience in Consultant Category</b> |               |        |
| ≥1 yr and <2 yrs                                  | 12-23 months  | 10 pts |
| ≥2 yrs and <4 yrs                                 | 24-47 months  | 20 pts |
| ≥4 yrs and <6 yrs                                 | 48-71 months  | 30 pts |
| ≥6 yrs and <8 yrs                                 | 72-95 months  | 45 pts |
| ≥8 yrs and <10 yrs                                | 96-119 months | 55 pts |
| ≥10 yrs   | 120 + months  | 65 pts |

### **4.6 PORTFOLIO PLANNER FOR REAL PROPERTY**

**The required services may include, but are not limited to the following:**

1. Analysis of external economic, land use and real estate market trends (environmental trends);
2. Examine and interpret the local and community policies, plans and by-laws;
3. Identifying the impact of anticipated environmental trends on an organization's real estate portfolio;
4. Developing building or space accommodation standards for an organization;
5. Developing organizational policies concerning the use of real property;
6. Identifying future space requirements of an organization and analyzing alternative solutions to meet such requirements;
7. Preparing profiles of existing building or portfolio condition, performance and utilization;
8. Identifying any potential problems a real estate portfolio presents in meeting organizational goals (eg. strengths/ weaknesses/ opportunities / threats analysis);
9. Comparing the performance of a portfolio of real property organization with its past performance, private-sector industry or government comparables;
10. Developing real property strategies to meet the organization's goals, accommodation requirements or real property "custodial" responsibilities;
11. Developing strategies to rationalize or dispose of a group of real property;
12. Prioritizing numerous real property projects (eg. maintenance, renovation / retrofit, tenant improvement, disposal, acquisition) in keeping with an organization's strategic goals and abilities;
13. Preparing real estate development strategies and real property master plans;
14. Preparing land use studies analyzing development initiatives or opportunities (eg. examining transportation and servicing issues); and
15. Developing a Communications Plan to public and media lines of inquiry.

### **PORTFOLIO PLANNER FOR REAL PROPERTY FLEXIBLE GRID**

#### **Levels of Expertise**

|              |                        |
|--------------|------------------------|
| Senior       | <b>Minimum 100 pts</b> |
| Intermediate | <b>Minimum 80 pts</b>  |
| Junior       | <b>Minimum 65 pts</b>  |

#### **Relevant Education to the Consultant Category**

|  |        |
|--|--------|
| University (PhD, Graduate, Undergraduate, degree). | 35 pts |
| College or CEGEP Diploma / Certificate.            | 25 pts |

#### **Professional Certification**

|                                     |        |
|-------------------------------------|--------|
| Relevant Professional Certification | 15 pts |
|-------------------------------------|--------|

#### **Relevant Experience in Consultant Category**

|                    |               |        |
|--------------------|---------------|--------|
| ≥1 yr and <2 yrs   | 12-23 months  | 15 pts |
| ≥2 yrs and <4 yrs  | 24-47 months  | 25 pts |
| ≥4 yrs and <6 yrs  | 48-71 months  | 35 pts |
| ≥6 yrs and <8 yrs  | 72-95 months  | 45 pts |
| ≥8 yrs and <10 yrs | 96-119 months | 55 pts |
| ≥10 yrs            | 120 + months  | 65 pts |

## Annex A Requirement

### **4.7 CLAIMS ANALYST**

**The required services may include, but are not limited to the following:**

1. Reviewing and analyzing project background data and reports with respect to contract issues, i.e. claims, change orders, schedule reports, delays analysis, disputed issues, etc;
2. Providing a complete detailed analysis of the monthly project schedule submissions commencing at the beginning of the project construction;
3. Reviewing contractors As Built Critical Path Schedule and compare to the original Baseline Plan/schedule;
4. Analyzing where schedule delays occurred and define critical/prime issues and causes (delay events) affecting the end date; impact of extension of time; identify concurrent delays;
5. Providing a detailed project Delay Analysis;
6. Identifying causes, circumstances and responsibilities (i.e. Contractor, consultant, PWGSC) leading to delays and potential claims;
7. Completing a change order analysis, including a review of Contemplated Change Notices (CCN) & Change Orders (CO). Include a history of each CO and identify if delays were caused, the extent and impacts on the end date;
8. Establishing costs incurred by the Crown as a result of contractor-caused delays;
9. Analyzing delay impact and associated costs resulting from the cumulative effect of numerous change orders;
10. Assisting the Project Manager in determining why a contractor is claiming for additional costs that have not been covered by change orders; and
11. Providing support in preparation for potential mediation.

## Annex A Requirement

**As part of the TEMS migration initiative, the following section has been added.**

### 5. TECHNICAL, ENGINEERING AND MAINTENANCE SERVICES STREAM

#### Technical, Engineering and Maintenance Services Stream Flexible Grid

This flexible grid is applied to all consultant categories of the Technical, Engineering and Maintenance Services Stream, unless otherwise specified.

| <b>TECHNICAL, ENGINEERING AND MAINTENANCE SERVICES STREAM FLEXIBLE GRID</b> |               |                       |
|---|---------------|-----------------------|
| <b>Levels of Expertise</b>  |               |                       |
| Senior  |               | <b>Minimum 70 pts</b> |
| Intermediate  |               | <b>Minimum 50 pts</b> |
| Junior  |               | <b>Minimum 40 pts</b> |
| <b>Relevant Education to the Consultant Category</b>                        |               |                       |
| University (PhD, Graduate, Undergraduate, degree).                          |               | 35 pts                |
| College or CEGEP Diploma / Certificate.                                     |               | 30 pts                |
| High School   |               | 15 pts                |
| <b>Professional Certification</b>   |               |                       |
| Relevant Professional Certification   |               | 10 pts                |
| <b>Relevant Experience in Consultant Category</b>                           |               |                       |
| ≥1 yr and <2 yrs  | 12-23 months  | 10 pts                |
| ≥2 yrs and <4 yrs   | 24-47 months  | 25 pts                |
| ≥4 yrs and <6 yrs   | 48-71 months  | 35 pts                |
| ≥6 yrs and <8 yrs   | 72-95 months  | 45 pts                |
| ≥8 yrs and <10 yrs  | 96-119 months | 55 pts                |
| ≥10 yrs   | 120 + months  | 65 pts                |

#### 5.1 DRAFTSPERSON / ILLUSTRATOR

**The required services may include, but are not limited to the following:**

1. producing engineering drawings;
2. producing data lists;
3. producing illustrated parts breakdown and parts lists;
4. preparing document illustrations; and
5. preparing computer aided design.

#### 5.2 TECHNICIAN

**The required services may include, but are not limited to the following:**

1. performing machinist services such as milling, turning, grinding, and fabrication on manually and/or computer controlled machines;
2. performing metal manipulation and welding services involving oxy-acetylene, MIG, TIG and/or special metal welding techniques;
3. performing vehicle mechanic and/or technician services involved in the servicing and repair of vehicle systems and subsystems;

## **Annex A Requirement**

4. performing electrician and/or electrical technician services associated with the servicing and repair of vehicle and communications systems within the vehicle;
5. performing optical, and/or optronic servicing and repair of vehicle and communications systems within the vehicle;
6. performing electronic technician services associated with the servicing and repair of vehicle and communications systems within the vehicle;
7. performing installation and operation of test sensors and programmable data recorders used in conjunction with equipment testing; and
8. performing optical data acquisition technical services including film and digital photo services, normal and high speed video, and/or x-ray photography.

## Annex A Requirement

### **5.3 ENGINEER**

**The required services encompass all electronic, electrical, optical, mechanical, structural and materiel systems which may include but are not necessarily limited to the following:**

1. preparing specifications for and carrying out the integration of systems and equipment;
2. conducting technical studies to produce technical options, validate and assess options, assess technical risks and evaluate designs;
3. developing design and prototype engineering solutions to technical problems;
4. maintaining and updating Unsatisfactory Condition Report (UCR) and Technical Failure Report (TFR) data bases. Researching, evaluating and responding to UCR/TFRs in conjunction with field support representatives;
5. producing draft specifications of systems, sub-systems, equipment, interfaces or ancillaries;
6. tailoring military or commercial standards, specifications or practices for incorporation into system specifications;
7. producing draft technical evaluation plans and evaluation standards;
8. generating and/or evaluating test plans, procedures and reports;
9. conducting specialized electromagnetic compatibility (EMC) studies, producing acceptable EMC standards and test procedures and evaluating EMC / electromagnetic interference (EMI) test results;
10. designing programmable data acquisition, test sensors and recorders used in conjunction with equipment testing;
11. developing simulation and analytical models and utilizing the models for system and sub-system development and assessment;
12. preparing airworthiness certification management plans;
13. managing the planning, coordination, documentation and engineering efforts connected with the airworthiness certification of modifications to air systems;
14. proposing and/or analyzing engineering change proposals, estimating costs / risks and making recommendations;
15. preparing budgetary estimates for the completion of technical programs;
16. preparing space and weight budgets for installations, assessing proposed designs, evaluating prototypes and developing acceptance tests for user hand over;
17. preparing drawings, data packages and systems manuals;
18. preparing interface standards and integration plans for the utilization of current and new systems/equipment;
19. reviewing and making recommendations on work proposals;
20. participating in planning meetings and technical reviews relating to the design, application management and support of software sub-systems;
21. designing, testing and modifying hardware interfaces to digital computers. Confirming the correct functioning of hardware/software interfaces;
22. preparing specifications and statements of work for the procurement of systems;
23. developing quality assurance and configuration management plans and practices;
24. conducting MA&S process and sub-process assessments and re-engineering;
25. tracking, correcting and recording system and equipment configuration status and/or conformance;
26. preparing business cases, i.e. cost/benefit analysis;
27. developing and assessing maintenance strategies, plans and support requirements;
28. providing equipment project management services; developing environmental protection standards, practices or policies;
29. preparing and reviewing instructions and procedures regarding the appropriate handling, clean-up, protective clothing and safety measures to deal with hazardous materials. Developing or obtaining specifications such as material Safety Data Sheets for hazardous materials that are new to the project;
30. conducting environmental or hazardous material assessments of equipment and systems. Assessing the toxicological impact of materials. Investigating alternate non-hazardous options;
31. conducting system integration analyses on the organization and processes involved the introduction

## Annex A Requirement

|   |
|---|
| <p>of and provision of ongoing support to vehicle and (or) communication systems;</p> <p>32. conducting a detailed derivation of integrated logistic system requirements for vehicle and communication systems within the vehicle and planning for the ongoing support to those systems;</p> <p>33. planning the conduct of, providing technical guidance to and conducting statistical analysis of reliability, maintainability, availability and dependability (RAMD) tests of vehicle and communication systems within the vehicle;</p> <p>34. managing the planning, coordination, documentation and engineering efforts connected with the configuration management of vehicle and communication systems within the vehicle;</p> <p>35. designing, planning, implementing and modifying quality assurance programs within manufacturing, processing or distribution systems;</p> <p>36. providing human factors engineering (ergonomics) services (physical and cognitive);</p> <p>37. conducting the human factors engineering process such as planning, analysis, design, test and evaluation, fundamentals and facilities of various environmental systems;</p> <p>38. conduct reviews of structural designs to ensure compliance with appropriate specifications, standards and guidelines;</p> <p>39. perform structural engineering analyses in the area of traditional stress analysis, preliminary design, finite element analysis, damage tolerance assessments ,loads derivation, structural dynamic response and/or fracture mechanics analysis; and</p> <p>40. preparing design documentation in support of structural engineering services , including draft stress reports, manufacturing drawings and/or design drawings.</p> |
|---|

| <b>ENGINEER CATEGORY FLEXIBLE GRID</b>               |                    |  |                       |
|--|--------------------|--|-----------------------|
| <b>Levels of Expertise</b>                           |                    |  |                       |
|  |                    | Senior   | <b>Minimum 95 pts</b> |
|  |                    | Intermediate                                       | <b>Minimum 65 pts</b> |
|  |                    | Junior   | <b>Minimum 55 pts</b> |
| <b>Relevant Education to the Consultant Category</b> |                    |  |                       |
|  |                    | University (PhD, Graduate, Undergraduate, degree). | 30 pts                |
| <b>Professional Certification</b>                    |                    |  |                       |
|  |                    | Relevant Professional Certification                | 10 pts                |
| <b>Relevant Experience in Consultant Category</b>    |                    |  |                       |
|  | ≥1 yr and <2 yrs   | 12-23 months                                       | 10 pts                |
|  | ≥2 yrs and <4 yrs  | 24-47 months                                       | 25 pts                |
|  | ≥4 yrs and <6 yrs  | 48-71 months                                       | 35 pts                |
|  | ≥6 yrs and <8 yrs  | 72-95 months                                       | 45 pts                |
|  | ≥8 yrs and <10 yrs | 96-119 months                                      | 55 pts                |
|  | ≥10 yrs            | 120 + months                                       | 65 pts                |

| <b>5.4 CLOTHING TECHNOLOGIST</b>   |  |
|--|--|
| <b>The required services may include, but are not limited to the following:</b>  |  |
| <ol style="list-style-type: none"> <li>1. Preparing new clothing technical specifications, manufacturing data, purchase descriptions, production drawings, sealed samples and revising existing specifications, drawings, and evaluation of existing sealed samples;</li> <li>2. Supporting the design and development of clothing;</li> <li>3. Reviewing and analysing vendors and manufacturers clothing samples and testing results for compliance with given specifications and testing standards;</li> <li>4. Establishing clothing technical databases for materiel and information management;</li> <li>5. Researching technical data to confirm accuracy and (or) currency and updating specifications, as required on these findings;</li> <li>6. Preparing Statements of Work for the design and purchase of prototypes and (or) samples;</li> <li>7. Investigating Unsatisfactory Condition Reports, Material Authorization Change Requests, Design Change/Deviation Requests, Requests for Waiver, Technical Failure Reports, etc. to determine their</li> </ol> |  |

## **Annex A Requirement**

- legitimacy and to make recommendations for reply;
8. Preparing clothing displays to meet requirements for conferences, exhibitions, briefings and meetings;
  9. Converting existing engineering drawings to new drawings utilizing commercial software applications for incorporation into specifications;
  10. Recommending revision of clothing scales of measurement in both Imperial and Metric measurements for inclusion in specifications, manufacturing data or purchase descriptions;
  11. Investigating designs, materials and processes and recommending solutions to identified technical problems through literature searches and in consultation with industry and technical experts;
  12. Supporting preparation of plans for development and (or) assessment of new requirements or items including laboratory, engineering, and field trial protocols
  13. Evaluating prototypes and commercial products to determine suitability;
  14. Evaluating clothing against technical specifications;
  15. Preparing or revising clothing information manuals and instructor manuals;
  16. Researching and monitoring emerging technologies and (or) products and (or) industrial capabilities for clothing;
  17. Supporting compliance of environmental regulations regarding use and disposal of clothing;
  18. Supporting clothing stock reviews and recommending disposal or reassignment; and
  19. Supporting preparations of maintenance/supply/repair and overhaul procedures and update notifications.

### **5.5 TEXTILE TECHNOLOGIST**

**The required services may include, but are not limited to the following:**

1. Preparing new clothing technical specifications, manufacturing data, purchase descriptions, production drawings, sealed samples and revising existing specifications, drawings, and evaluation of existing sealed samples;
2. Supporting the design and development of textiles;
3. Reviewing and analysing vendors and manufacturers textile samples and testing results for compliance to given specifications and testing standards;
4. Establishing textile technical databases for material and information management;
5. Researching technical data to confirm accuracy and (or) currency and updating specifications, as required on these findings;
6. Preparing Statements of Work for the design and purchase of prototypes and (or) samples;
7. Investigating Unsatisfactory Condition Reports, Material Authorization Change Requests, Design Change/Deviation Requests, Requests for Waiver, Technical Failure Reports, etc. to determine legitimacy and make recommendations for reply;
8. Supporting textile stock reviews and recommending disposal or reassignment;
9. Preparing clothing and personal protection equipment displays to meet requirements for conferences, exhibitions, briefings and meetings;
10. Converting existing engineering drawings to new drawings utilizing commercial software applications for incorporation into specifications;
11. Recommending revision of clothing scales of measurement in both Imperial and Metric measurements for inclusion in specifications, manufacturing data or purchase descriptions;
12. Supporting preparation or revision of textile information manuals and instructor manuals;
13. Investigating designs, materials and processes and recommending solutions to identified technical problems through literature searches and in consultation with industry and technical experts;
14. Supporting preparation of plans for development and (or) assessment of new requirements or items including laboratory, engineering, and field trial protocols;
15. Evaluating prototypes and commercial products to determine suitability;
16. Evaluating textile against technical specifications;
17. Supporting compliance of environmental regulations regarding use and disposal of textiles; and
18. Researching and monitoring emerging technologies and (or) products and (or) industrial capabilities

## Annex A Requirement

for textiles.

### **5.6 PERSONAL PROTECTION EQUIPMENT TECHNOLOGIST**

**The required services may include, but are not limited to the following:**

1. Preparing new clothing technical specifications, manufacturing data, purchase descriptions, production drawings, sealed samples and revising existing specifications, drawings, and evaluation of existing sealed samples;
2. Reviewing and analysing vendors and manufacturers personal protection equipment samples and testing results for compliance to given specifications and testing standards;
3. Establishing personal protection equipment technical databases for materiel and information management;
4. Preparing Statements of Work for the design and purchase of prototypes and (or) samples;
5. Supporting the design and development of personal protection equipment;
6. Investigating Unsatisfactory Condition Reports, Material Authorization Change Requests, Design Change/Deviation Requests, Requests for Waiver, Technical Failure Reports, etc. to determine legitimacy and make recommendations for reply;
7. Converting existing engineering drawings to new drawingsutilizing commercial software applications for incorporation into specifications;
8. Supporting personal protection stock reviews and recommending disposal or reassignment;
9. Preparing personal protection equipment displays to meet requirements for conferences, exhibitions, briefings and meetings;
10. Recommending revision of personal protection equipment scales of measurement in both Imperial and Metric measurements for inclusion in specifications, manufacturing data or purchase descriptions;
11. Supporting preparation or revision of personal protection equipment information manuals and instructor manuals;
12. Investigating designs, materials and processes and recommending solutions to identified technical problems through literature searches and in consultation with industry and technical experts;
13. Evaluating prototypes and commercial products to determine suitability;
14. Supporting preparing plans for development and (or) assessment of new requirements or items including laboratory, engineering, and field trial protocols;
15. Evaluating personal protection equipment against technical specifications;
16. Supporting compliance of environmental regulations regarding use and disposal of personal protection equipment;
17. Supporting preparations of maintenance/supply/repair and overhaul procedures and update notifications; and
18. Researching and monitoring emerging technologies and (or) products and (or) industrial capabilities for personal protection equipment;

### **5.7 NUCLEAR/BIOLOGICAL/CHEMICAL (NBC) PERSONAL PROTECTION TECHNOLOGIST**

**The required services may include, but are not limited to the following:**

1. Preparing new clothing technical specifications, manufacturing data, purchase descriptions, production drawings, sealed samples and revising existing specifications, drawings, and evaluation of existing sealed samples;
2. Supporting the design and development of NBC personal protection equipment;
3. Reviewing and analysing vendors and manufacturers NBC samples and testing results for compliance to given specifications and testing standards;
4. Establishing NBC personal equipment technical databases for materiel and information management;

## **Annex A Requirement**

5. Preparing Statements of Work for the design and purchase of prototypes and (or) samples;
6. Investigating Unsatisfactory Condition Reports, Material Authorization Change Requests, Design Change/Deviation Requests, Requests for Waiver, Technical Failure Reports, etc. to determine legitimacy and make recommendations for reply;
7. Converting existing engineering drawings to new drawings utilizing commercial software applications for incorporation into specifications;
8. Supporting NBC personal protection equipment reviews and recommending disposal or reassignment;
9. Preparing NBC personal protection equipment displays to meet requirements for conferences, exhibitions, briefings and meetings;
10. Recommending of NBC personal protection equipment revision of scales of measurement in both Imperial and Metric measurements for inclusion in specifications, manufacturing data or purchase descriptions;
11. Supporting preparation or revision of NBC personal protection equipment information manuals and instructor manuals;
12. Investigating designs, materials and processes and recommending solutions to identified technical problems through literature searches and in consultation with industry and technical experts;
13. Evaluating prototypes and commercial products to determine suitability;
14. Supporting preparing of plans for development and (or) assessment of new requirements or items including laboratory, engineering, and field trial protocols;
15. Evaluating NBC personal protection equipment against technical specifications;
16. Supporting compliance of environmental regulations regarding use and disposal of NBC personal protective equipment;
17. Reviewing and analysing results of periodic testing of gas masks and canisters;
18. Monitoring gas masks repair operations to identify tooling/facility shortfalls and investigate and recommending solutions;
19. Supporting preparing of maintenance /supply /repair and overhaul procedures and updating notifications; and
20. Researching and monitoring emerging technologies and (or) products and (or) industrial capabilities for NBC personal protection equipment.

### **5.8 HANDWEAR/KNITTED FOOTWEAR AND ACCESSORIES TECHNOLOGIST**

**The required services may include, but are not limited to the following:**

1. Preparing new clothing technical specifications, manufacturing data, purchase descriptions, production drawings, sealed samples and revising existing specifications, drawings, and evaluation of existing sealed samples;
2. Supporting the design and development of handwear/knitted footwear;
3. Reviewing and analysing vendors and manufacturers handwear and knitted footwear samples and testing results for compliance to given specifications and testing standards;
4. Establishing handwear/knitted footwear and accessories technical databases for materiel and information management;
5. Preparing Statements of Work for the design and purchase of prototypes and (or) samples;
6. Investigating Unsatisfactory Condition Reports, Material Authorization Change Requests, Design Change/Deviation Requests, Requests for Waiver, Technical Failure Reports, etc. to determine legitimacy and make recommendations for reply;
7. Supporting handwear/knitted footwear and accessories reviews and recommending disposal or reassignment;
8. Preparing handwear/knitted footwear displays to meet requirements for conferences, exhibitions, briefings and meetings;
9. Converting existing engineering drawings to new drawings utilizing commercial software applications for incorporation into specifications;
10. Recommending revision of handwear/knitted footwear and accessories scales of measurement in

## **Annex A Requirement**

|  |
|--|
| <p>both Imperial and Metric measurements for inclusion in specifications, manufacturing data or purchase descriptions;</p> <ol style="list-style-type: none"><li>11. Investigating designs, materials and processes and recommending solutions to identified technical problems through literature searches and in consultation with industry and technical experts;</li><li>12. Evaluating prototypes and commercial products to determine suitability;</li><li>13. Support preparation of plans for development and (or) assessment of new requirements or items including laboratory, engineering, and field trial protocols;</li><li>14. Evaluating footwear/knitted footwear and accessories against technical specifications;</li><li>15. Supporting compliance of environmental regulations regarding use and disposal of footwear/knitted footwear and accessories; and</li><li>16. Researching and monitoring emerging technologies and (or) products and (or) industrial capabilities for footwear/knitted footwear and accessories.</li></ol> |
|--|

### **5.9 FOOTWEAR TECHNOLOGIST**

**The required services may include, but are not limited to the following:**

1. Preparing new clothing technical specifications, manufacturing data, purchase descriptions, production drawings, sealed samples and revising existing specifications, drawings, and evaluation of existing sealed samples;
2. Supporting the design and development of footwear;
3. Reviewing and analysing vendors and manufacturers footwear samples and testing results for compliance to given specifications and testing standards;
4. Establishing footwear technical databases for materiel and information management;
5. Preparing Statements of Work for the design and purchase of prototypes and (or) samples;
6. Investigating Unsatisfactory Condition Reports, Material Authorization Change Requests, Design Change/Deviation Requests, Requests for Waiver, Technical Failure Reports, etc. to determine legitimacy and make recommendations for reply;
7. Supporting footwear reviews and recommending disposal or reassignment;
8. Preparing footwear displays to meet requirements for conferences, exhibitions, briefings and meetings;
9. Converting existing engineering drawings to new drawings utilizing commercial software applications for incorporation into specifications;
10. Recommending revision of footwear scales of measurement in both Imperial and Metric measurements for inclusion in specifications, manufacturing data or purchase descriptions;
11. Investigating designs, materials and processes and recommending solutions to identified technical problems through literature searches and in consultation with industry and technical experts;
12. Evaluating prototypes and commercial products to determine suitability;
13. Supporting preparation of plans for development and (or) assessment of new requirements or items including laboratory, engineering, and field trial protocols;
14. Evaluating footwear against technical specifications;
15. Provision of technical guidance to manufacturers during the production of prototypes that may include plant visits;
16. Supporting compliance of environmental regulations regarding use and disposal of footwear; and
17. Researching and monitoring emerging technologies and (or) products and (or) industrial capabilities for footwear.

### **5.10 PATTERN DESIGN, DEVELOPMENT, AND SIZING TECHNOLOGIST**

**The required services may include, but are not limited to the following:**

1. Creating and inputting clothing and personal protection equipment new patterns/drawings and

## Annex A Requirement

- revising existing patterns and drawings in the apparel Computer Aided Design (CAD) system;
2. Researching technical data to confirm accuracy and (or) currency and updating clothing and personal protection equipment pattern drawings as required;
3. Supporting the design and development of clothing and personal protection equipment;
4. Reviewing and analysing vendors and manufacturers clothing and personal protection equipment samples and testing results for compliance to given specifications and testing standards;
5. Establishing clothing and personal protection equipment technical databases for materiel and information management;
6. Preparing Statements of Work for the design and purchase of prototypes and (or) samples;
7. Investigating Unsatisfactory Condition Reports, Material Authorization Change Requests, Design Change/Deviation Requests, Requests for Waiver, Technical Failure Reports, etc. to determine legitimacy and make recommendations for reply;
8. Supporting clothing and personal protection equipment pattern and sizing reviews and recommending disposal or reassignment of patterns;
9. Preparing clothing and personal protection equipment displays to meet requirements for conferences, exhibitions, briefings and meetings;
10. Converting existing engineering drawings to new drawings utilizing commercial software applications for incorporation into specifications;
11. Creating clothing and personal protection equipment scales of measurement in both Imperial and Metric measurements for inclusion in specifications, manufacturing data or purchase descriptions;
12. Supporting preparation or revision clothing and personal protection equipment information manuals and instructor manuals;
13. Investigating designs, materials and processes and recommending solutions to identified technical problems through literature searches and in consultation with industry and technical experts;
14. Evaluating prototypes and commercial products to determine suitability;
15. Supporting preparation of plans for development and (or) assessment of new requirements or items including laboratory, engineering, and field trial protocols;
16. Evaluating clothing and personal protection equipment against patterns;
17. Supporting compliance of environmental regulations regarding use and disposal of clothing and personal protection equipment;
18. Creating clothing and personal protection equipment pattern markers for manufacturers and for evaluation of fabric usage estimates;
19. Fabricating prototypes/samples for confirmation of patterns, assembly procedures and upgrading purposes; and
20. Researching and monitoring emerging technologies and (or) products and (or) industrial capabilities for clothing and personal protection equipment.

### **5.11 CLOTHING AND PERSONAL PROTECTION EQUIPMENT DESIGN AND PROTOTYPING TECHNOLOGIST**

**The required services may include, but are not limited to the following:**

1. Designing, developing and fabricating clothing, personal protection equipment and load carriage prototypes for design acceptance and specification preparation;
2. Evaluating clothing and personal protection equipment prototypes from industry to determine construction characteristics and to determine suitability;
3. Fabricating clothing and personal protection equipment prototypes to test patterns prior to computerized grading/sizing;
4. Supporting evaluation of vendors and manufacturers clothing and personal protection equipment samples for compliance with specified measurements and construction methods; and
5. Supporting maintenance of specialized equipment used in the construction/fabrication of clothing and personal protection equipment.

## Annex A Requirement

### **5.12 BADGES/INSIGNIA/CEREMONIAL ACCOUTREMENTS TECHNOLOGIST**

**The required services may include, but are not limited to the following:**

1. Preparing new clothing technical specifications, manufacturing data, purchase descriptions, production drawings, sealed samples and revising existing specifications, drawings, and evaluation of existing sealed samples;
2. Supporting the design and development of badges/insignia/ceremonial accoutrements;
3. Reviewing and analysing vendors and manufacturers badges, insignia and ceremonial accoutrements samples and testing results for compliance to given specifications and testing standards;
4. Establishing badges, insignia ceremonial accoutrements technical databases for materiel and information management;
5. Preparing Statements of Work for the design and purchase of prototypes and (or) samples;
6. Investigating Unsatisfactory Condition Reports, Material Authorization Change Requests, Design Change/Deviation Requests, Requests for Waiver, Technical Failure Reports, etc. to determine legitimacy and make recommendations for reply;
7. Supporting badges, insignia and ceremonial accoutrements reviews and recommending disposal or reassignment;
8. Preparing badges/insignia/ceremonial accoutrements displays to meet requirements for conferences, exhibitions, briefings and meetings;
9. Converting existing engineering drawings to new drawingsutilizing commercial software applications for incorporation into specifications;
10. Supporting preparation or revision badges, insignia and ceremonial accoutrements information manuals and instructor manuals;
11. Investigating designs, materials and processes and recommending solutions to identified technical problems through literature searches and in consultation with industry and technical experts;
12. Evaluating prototypes and commercial products to determine suitability;
13. Supporting preparing plans for development and (or) assessment of new requirements or items including laboratory, engineering, and field trial protocols;
14. Evaluating badges, insignia and ceremonial accoutrements and insignia against technical specifications;
15. Supporting compliance of environmental regulations regarding use and disposal of badges, insignia and ceremonial accoutrements; and
16. Researching and monitoring emerging technologies and (or) products and (or) industrial capabilities for badges, insignia and ceremonial accoutrements.

### **5.13 INTEGRATED LOGISTICS SUPPORT (ILS) SPECIALIST**

**The required services may include, but are not limited to the following:**

1. preparing correspondence and documents related to the acceptance/rejection of deliverables;
2. preparing statements of work and item descriptions for inclusion into requests for proposals;
3. providing feedback and (or) data clarification to the project management authority;
4. conducting evaluations of ILS bid proposals and provide feedback and recommendations to the project management authority;
5. Working with engineering and procurement to ensure ILS efforts are integrated with other program activities;
6. Planning and implementing logistic support elements which include: maintenance tasks, spares, training, technical publications, translation and facilities; and
7. Preparing and presenting to business units and operational divisions which cover issues of maintenance and supply support.

## Annex A Requirement

### **5.14 TECHNICAL CLERK**

**The required services may include, but are not limited to the following:**

1. physically assembling complete or partial Technical Data Packages (TDPs) and identifying and actioning deficiencies in data packages of systems and equipment;
2. receiving, logging, taking custody of and acknowledging the receipt of TDPs which describe additions, modifications and/or deletions of technical data;
3. collecting, reviewing and updating configuration management data for input into the environmental configuration management information system;
4. modifying, validating and compiling technical data package lists, that will include:
  - a. technical publications;
  - b. specifications;
  - c. performance test sheets;
  - d. equipment and system data lists and drawings;
  - e. repair and overhaul specifications; and
  - f. other technical descriptors in accordance with Data Technical Descriptions (DTDs) and Data Item Descriptions (DIDs);
5. updating, validating and compiling technical data action notices;
6. reviewing documents, drawings and associated data for conformance to standards; and
7. formatting technical documents.

**Annex B SO/SA  
TSPS Generic Security Requirements Check Lists (SCRLs)**

**As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.**

The list and details of the 31 pre-approved SRCL's for professional services is available for download from the CPSS website: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/31-eng.html>

Note: SO/SA refers to the Standing Offer and the Supply Arrangement



## General Instructions of Quarterly Usage Report

### Introduction

The Government of Canada (GC) requires that Suppliers provide Usage Reports to the Supply Arrangement (SA) and Standing Offer (SO) Authority on a quarterly basis.

### Response Due Date

Completion of the report is **MANDATORY** and you are required to return it by the due date indicated below.

| Quarter | Period to be Covered     | Due on or before |
|---------|--------------------------|------------------|
| 1st     | April 1 to June 30       | July 15          |
| 2nd     | July 1 to September 30   | October 15       |
| 3rd     | October 1 to December 31 | January 15       |
| 4th     | January 1 to March 31    | April 15         |

Please ensure that you enable the macros in order to use the complete functionality of this report template.

### Information to be Reported

For each Standing Offer or Supply Arrangement or both that the Supplier has been issued, the Supplier must report:

- a) All call-ups issued during the period in question;
- b) All contracts issued during the period in question;
- c) All amendments to call-ups issued during the period regardless of when the original call-up was issued;
- d) All amendments to contracts issued during the period regardless of when the original contract was issued.

### Completing the report

- a) Suppliers must complete all applicable portions of the report.
- b) This report has 4 sections identified by the labels of each worksheet on this file. The fields that allow editing are painted in white. Use your mouse to move between required fields. Some fields have pull down lists - you must use only the options presented on the lists provided.
- c) Please do not substitute brochures, catalogues or annual reports in lieu of answers to our questions.
- d) For a specific Standing Offer or Supply Arrangement, if the Supplier is not awarded any call-ups or contracts during the period in question, the Supplier must still complete the Report form provided. In the Utilization Report template, in column E of the sheets titled "SO-Information Sheet" and "SA-Information Sheet", the Supplier must select "None" from the drop down list.

### Currency

All monetary values must be stated in Canadian dollars (CDN) and must include all applicable taxes.

### Changing the Format

Suppliers must not modify the format of this report. Should you have any suggestions about the format, please forward them by e-mail to:

Learning Services: [SPTS.TSPS@tpsgc-pwgsc.gc.ca](mailto:SPTS.TSPS@tpsgc-pwgsc.gc.ca)

### Returning the Completed Report

Please e-mail the completed report to:

Learning Services: [SPTS.TSPS@tpsgc-pwgsc.gc.ca](mailto:SPTS.TSPS@tpsgc-pwgsc.gc.ca)

### Confidentiality

GC will keep your response confidential.

### Questions

Should you need further clarification, please forward your questions by e-mail to the following address (do not forget to include your name and phone number):

Learning Services: [SPTS.TSPS@tpsgc-pwgsc.gc.ca](mailto:SPTS.TSPS@tpsgc-pwgsc.gc.ca)

### Instructions on Completing the Report Form

#### **1) Completion of Organization Profile Sheet**

- a) Suppliers must, for each Standing Offer or Supply Arrangement or both issued to them, select their legal name from the drop down list. The template will automatically populate each Standing Offer number or Supply Arrangement number or both that the Supplier has.
- b) Suppliers must provide contact information for the Supplier's primary representative and alternate (if applicable) who was responsible for completing the utilization report template.

#### **2) Completion of SO-Information and SA-Information Sheets**

**Column C - "Standing Offer Number / Supply Arrangement Number"**

## General Instructions of Quarterly Usage Report

Supplier must select the appropriate Standing Offer or Supply Arrangement number from the drop down list. System will allow copying and pasting into another cell in this column a Standing Offer or Supply Arrangement number that already exists in the list.

### Column D – “Method of Supply”

Supplier can only select from the drop down list. System will allow copying and pasting into another cell in this column a Method of Supply that already exists in the list.

### Column E – “New Activity”

If a call-up, amendment to a call-up, contract, or contract amendment has been issued against each specific Standing Offer or Supply Arrangement during the period, the Supplier must choose “Yes” from the drop down list.

If a call-up, amendment to a call-up, contract, or contract amendment has not been issued against a specific Standing Offer or Supply Arrangement during the period, the Supplier must choose “None” from the drop down list. The template will automatically populate the remaining cells in the row.

### Column F – “Call-up or Amendment” / “Contract or Amendment”

Supplier must select from the drop down list. System will allow copying and pasting into another cell in this column the reference to “Call-up”, “Contract” or “Amendment”.

### Column G – “Call-up N<sup>o</sup>” / Contract N<sup>o</sup>”

Call-ups or Contracts - Supplier must enter the complete call-up or contract number.

Amendment to a Call-up or Contract - Supplier must enter the complete call-up or contract number that has been amended.

System will allow copying the complete call-up or contract number and pasting into another cell in this column.

### Column H – “Amendment N<sup>o</sup>”

Supplier must enter the number of the amendment (i.e. “1”, “2”, “3”, etc.).

### Column I – “Call-up/Amendment Issuance Date” / “Contract/Amendment Issuance Date”

Date the call-up, contract, amendment to call-up, or amendment to contract was issued must be entered in the form of MM/DD/YYYY.

### Column J - “Call-up/Amendment Start Date / “Contract/Amendment Start Date”

Date the work covered under the call-up or contract is scheduled to start. For amendments to a call-up or contract, the date is the revised starting date for the work. All dates must be entered in the form of MM/DD/YYYY.

### Column K - “Call-up/Amendment End Date / “Contract/Amendment End Date”

Date the work covered under the call-up or contract is scheduled to end. For amendments to a call-up or contract, the date is the revised end date for the work. All dates must be entered in the form of MM/DD/YYYY.

### Column L – “Client Department”

Supplier must select the appropriate Department/Agency name from the drop down list. System will allow copying the Client Department name and pasting into another cell in this column.

### Column M – “Contact Name”

Supplier must indicate the full name of the contact from the Client Department. System will allow copying the contact name and pasting into another cell in this column.

### Column N – “Telephone Number”

Supplier must indicate the full telephone number, including area code, of the contact from the Client Department. System will allow copying the telephone number and pasting into another cell in this column. Telephone numbers must be entered in the form of 5551234567. Entries such as 555-123-4567 will not be accepted.

### Column O – “Classification or Consultant Category”

Supplier must select the appropriate Classification or Consultant Category from the drop down list. If the Supplier selects “Multiple Classifications/Categories” from the drop down list, the Supplier must, in the “Comments” column (column R), provide a list of the Classifications/Categories. System will allow copying the Classification/Category and pasting into another cell in this column.

### Column P – “Delivery Location”

Supplier must select from the drop down list the appropriate region or Metropolitan Area where the work is being performed. System will allow copying the delivery location and pasting into another cell in this column.

### Column Q – “Total Call-up or Amendment Value” / “Total Contract or Amendment Value”

If reporting the value of an amendment to a call-up or contract, Suppliers are to report only the total value of the amendment not the revised call-up or contract value. All values are to be reported in Canadian dollars.

### Column R – “Comments”

Suppliers who have selected “Multiple Categories” in column M, for a call-up or contract, must list each of the Consultant Categories in this column. Suppliers may also add additional text in this column as required.



Public Works and  
Government Services  
Canada

Travaux publics et  
Services gouvernementaux  
Canada

### Organization Profile

(1) Please select your legal name from the drop-down list in the spaces below. If your organization has more than one Standing Offer and/or Supply Arrangement, please indicate all of them.

| First SO    |  | First SA    |  |
|-------------|--|-------------|--|
| Legal name: |  | Legal name: |  |
| SO Number:  |  | SA Number:  |  |

  

| Second SO   |  | Second SA   |  |
|-------------|--|-------------|--|
| Legal name: |  | Legal name: |  |
| SO Number:  |  | SA Number:  |  |

  

| Third SO    |  | Third SA    |  |
|-------------|--|-------------|--|
| Legal name: |  | Legal name: |  |
| SO Number:  |  | SA Number:  |  |

  

| Fourth SO   |  | Fourth SA   |  |
|-------------|--|-------------|--|
| Legal name: |  | Legal name: |  |
| SO Number:  |  | SA Number:  |  |

  

| Fifth SO    |  | Fifth SA    |  |
|-------------|--|-------------|--|
| Legal name: |  | Legal name: |  |
| SO Number:  |  | SA Number:  |  |

(2) Complete the details of the person who is the primary contact regarding this report:

|               |  |
|---------------|--|
| Contact name: |  |
| Title:        |  |
| Email:        |  |
| Phone No.:    |  |

(3) If applicable, provide details for the alternate contact regarding this report:

|               |  |
|---------------|--|
| Contact name: |  |
| Title:        |  |
| Email:        |  |
| Phone No.:    |  |







### Annex D - Client Satisfaction Form

|  |  |  |                    |
|--|--|--|--------------------|
| <b>SO# or SA#:</b>   |  | <b>Call-up# / Contract# :</b>  |                    |
| <b>Professional Services</b><br><input type="checkbox"/> TBIPS SO <input type="checkbox"/> TSPS SO <input type="checkbox"/> Learning Services SO <input type="checkbox"/> ProServices<br><b>Method of Supply</b><br><input type="checkbox"/> TBIPS SA <input type="checkbox"/> TSPS SA-Task <input type="checkbox"/> Learning Services SA <input type="checkbox"/> Other<br><input type="checkbox"/> SBIPS SA <input type="checkbox"/> TSPS SA-Solution <input type="checkbox"/> PASS SA    Specify _____  |  |  |                    |
| <b>Contractor's Name:</b>  |  | <b>Award Amt:</b>  | <b>Award Date:</b> |
| <b>Contractor's Address:</b>   |  | <b>Amend Amt:</b>  | <b>End Date:</b>   |
|  |  | <b>Total Spent:</b>  |                    |
|  |  | <b>TA Contract:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No |                    |
| <b>Description of Work:</b>  |  | <b>Amendment History:</b>  |                    |
|  |  |  |                    |
| <b>Client Department:</b>  |  |  |                    |
| <b>Technical Authority</b>   |  | <b>Client Contracting Authority</b>  |                    |
| Name:  |  | Name:  |                    |
| Telephone #:   |  | Telephone #:   |                    |
| e-mail:  |  | e-mail:  |                    |
|  |  | <b>PWGSC Contracting Authority (if applicable)</b>                           |                    |
|  |  | Name:  |                    |
|  |  | Telephone #:   |                    |
|  |  | e-mail:  |                    |
| <b>1. How do you rate the Contractor's overall performance?</b><br><input type="checkbox"/> below expectations <input type="checkbox"/> as expected <input type="checkbox"/> above expectations  |  |  |                    |
| <b>2. Resources</b><br>a. Did the Contractor provide the resource(s) as identified in their Proposal? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>b. Did the Contractor's resource(s) conduct their work in a professional manner? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>c. Were replacement resources required? <input type="checkbox"/> Yes <input type="checkbox"/> No  |  |  |                    |
| <b>3. Replacement Resources</b><br>a. Did the Contractor request to replace the resource(s) immediately after Contract Award? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA<br>b. Did the Client request to replace the resource(s)? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA<br>c. Did the Replacement Resources meet the requirements of the RFP or ACF? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA<br>d. How many times were the Contractor's resources replaced?    _____ times   |  |  |                    |
| <b>4. Was the Contract completed within the predetermined:</b><br>a. Time Estimate? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>b. Cost Estimate? <input type="checkbox"/> Yes <input type="checkbox"/> No   |  |  |                    |
| <b>5. Were the required Reports and Deliverables:</b><br>a. In conformity with the Scope & Tasks of the SOW <input type="checkbox"/> Yes <input type="checkbox"/> No<br>b. Received in the specified time frame? <input type="checkbox"/> Yes <input type="checkbox"/> No  |  |  |                    |
| <b>6. Contract Management</b><br>a. Did the Contractor deal with performance issues in a timely basis? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA<br>b. Did the Contractor submit the invoices in accordance with the Invoicing Instructions? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>c. Did the Contractor submit the invoices in accordance with the Basis of Payment? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>d. Did the Contractor submit the invoices in accordance with the Method of Payment? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>e. Did the Contractor respond to every TA Request? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA<br>f. Did the Contractor properly respond to every TA Request? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA |  |  |                    |
| <b>7. Remarks</b><br><br><br><br><br><br><br><br><br><br>  |  |  |                    |

## **Annex E SO/SA**

### **Qualified Categories and Rates**

**As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.**

#### **Annex E to Component II (SA) : Qualified Categories**

Annex E to Component II will be attached to the TSPS Supply Arrangement upon award.

Note: SA refers to the Supply Arrangement, Component II

#### **Annex E to Component III (SO): Qualified Categories and Rates**

Annex E to Component III will be attached to the TSPS Standing Offer upon award.

Note: SO refers to the Standing Offer, Component III

## Annex F SA

### Insurance Requirements

1. The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
2. The Commercial General Liability policy must include the following:
  - a. Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
  - b. Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
  - c. Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
  - d. Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
  - e. Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
  - f. Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
  - g. Employees and, if applicable, Volunteers must be included as Additional Insured.
  - h. Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
  - i. Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
  - j. Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
  - k. If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
  - l. Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.

- m. Non-Owned Automobile Liability - Coverage for suits against the Contractor resulting from the use of hired or non-owned vehicles.
- n. Advertising Injury: While not limited to, the endorsement must include coverage piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.
- o. All Risks Tenants Legal Liability - to protect the Contractor for liabilities arising out of its occupancy of leased premises.

Where the Supplier is a JV, for the purposes of the SA and any related documents (including insurance certificates), Canada requires that the JV Contractor identify itself by a single name. Upon request by Canada, a JV Contractor must specify the name of the JV to the Contracting Authority.



**ANNEX F**  
**Availability Confirmation Form**  
for  
**Call-ups Against a Standing Offer**  
for  
**Task and Solutions Professional Services (TSPS)**  
required by  
**[Canada will insert Identified User]**

This Availability Confirmation Form (ACF) must be used where an Offeror wishes to submit the résumé(s) of a resource to be provided upon the issuance of a Call-up.

A maximum of **[Canada will insert number]** résumé(s) per Category requested will be assessed per Offeror submission. Resumes provided beyond the maximum will not be assessed. **If by error more than the maximum allowable résumés are submitted, the résumé(s) to be assessed will be determined by alphabetical order based on the individual's last name.**

This ACF constitutes an Offeror's Response, when completed by an Offeror and provided to the Contracting Authority listed below. All terms and conditions of the Offeror's Standing Offer apply and are incorporated by reference into this ACF.

| Availability Confirmation Form                              |   |
|---|---|
| <b>Date of Issuance:</b> [YYYY-MM-DD]                       | <b>Identified User, also called the Client:</b><br>[Canada will insert Identified User] |
| <b>ACF Form No (Optional):</b><br>_____                     | <b>Identified User Reference No.:</b> _____   |
| This requirement is set-aside for Aboriginal suppliers only | Yes [ ] No [ ]  |
| This requirement has the need for Task Authorizations       | Yes [ ] No [ ]  |
| Sub article "Refusal of Task Authorizations" applies        | Yes [ ] No [ ]  |
| This requirement is subject to Defence Production           | Yes [ ] No [ ]  |
| This requirement is subject to the Controlled Goods Program | Yes [ ] No [ ]  |
|   |   |

| A GENERAL INFORMATION  |  |
|--|--|
| <b>1. Response Requirements</b>  |  |
| <p><b>a. Response Due Date</b></p> <p>Offeror's Response to this ACF must be received by the Contracting Authority identified at Block 1b no later than:</p> <p>_____ [AM/PM] [Time Zone]</p> <p>of the following date:<br/>[YYYY-MM-DD]</p> | <p><b>b. The Response and any enquiry must <u>only</u> be directed to:</b></p> <p>i. Name of Contracting Authority: _____</p> <p>ii. Address: _____</p> <p>iii. Telephone No: [(xxx) xxx-xxxx]</p> <p>iv. Response is to be sent via:<br/>Hardcopy [ ] Softcopy [ ]</p> <p>Fax: [(xxx) xxx-xxxx]</p> <p>E-mail: [xxxxxxxx@xxxx.xxxx.xxx]</p> |



## B REQUIREMENT SUMMARY

### 1. Statement of Work (SOW)

[Canada will choose one of the following two options]

**[OPTION 1] SEE ATTACHED SOW PROVIDED** [Canada will attach document]

**[OPTION 2 – CANADA WILL INSERT AS PER BELOW]**

**1.1 BACKGROUND** [details]

**1.2 SCOPE OF WORK** [details will be inserted, including any reporting requirements]

**1.3 TECHNICAL ENVIRONMENT** [details]

**1.4 DELIVERABLES** [details]

### 2. Payments

#### 2a. Basis of Payment

- Professional Services provided under a TA with a Maximum Price of \$ \_\_\_\_\_
- Professional Services provided with a Maximum Price of \$ \_\_\_\_\_
- Professional Services provided under a TA with a Firm Price
- Professional Services provided with a Firm Price
- Professional Services provided

|                              |  |
|------------------------------|--|
| <b>2b. Method of Payment</b> | <b>2c. Payment Credits sub article applies</b> |
|------------------------------|--|

- Single Payment
- Monthly Payment
- TA with a Maximum Price
- TA with a Firm Price –Lump Sum

- Yes
- No

#### 2d. Pre Authorized Travel and Living Expenses

- Canada will reimburse
- Canada will not reimburse

#### 2e. In the sub article Limitation of Expenditure - Customs Duties are

- included
- excluded
- subject to exemption

### 3. Contract Period

|                           |              |              |            |              |
|---------------------------|--------------|--------------|------------|--------------|
| <b>a. Contract Period</b> | <b>From:</b> | [YYYY-MM-DD] | <b>To:</b> | [YYYY-MM-DD] |
|---------------------------|--------------|--------------|------------|--------------|

|   |   |
|---|---|
| <p><b>b. Option to Extend the Contract</b><br/>[If an option applies, these blanks will be filled in by Canada]</p> | <p>The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to ___ additional ___-[week/month/year] period(s) under the same terms and conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions set out in the Basis of Payment.</p> <p>Canada may exercise this option at any time by sending a written notice to the Contractor at least ___ calendar days before the expiry date of the Contract. The option may only be exercised by the Call-Up Authority and must be evidenced through a contract amendment.</p> |
|---|---|



| <b>c. Optional Work</b>  |   |   |                                   |   |                     |
|--|---|---|-----------------------------------|---|---------------------|
| <i>[If applicable, blanks must be completed]</i>   |   |   |                                   |   |                     |
| <b>4. Categories Required in accordance with the Standing Offer Annex A:</b>   |   |   |                                   |   |                     |
| Category   | Level of Expertise  | Language Requirement<br><i>[if bilingual is required, both will be checked off]</i> | Security Requirement for Category | Estimated Level of Effort<br><i>[must be determined by Identified User at ACF issuance]</i> | Number of Resources |
| <i>[Name of Category will be inserted]</i>   |   | <input type="checkbox"/> French<br><input type="checkbox"/> English                 |                                   |   |                     |
| <i>[Rows will be inserted as required]</i>   |   | <input type="checkbox"/> French<br><input type="checkbox"/> English                 |                                   |   |                     |
| <b>5. Work Location</b>  | Contractor's location: <input type="checkbox"/><br>Other <input type="checkbox"/> (specify):  |   |                                   |   |                     |
| <b>6. Indicate Region or Metropolitan Area</b>   | <i>[Canada will Insert Region(s) or Metropolitan Area(s)]</i>   |   |                                   |   |                     |
| <b>7. Travel Requirements</b>  |   |   |                                   |   |                     |
| <b>8. Security Requirement</b>   | Yes <input type="checkbox"/> No <input type="checkbox"/>  |   |                                   |   |                     |
| <b>Article "Security Requirement" Option that applies:</b> <input type="checkbox"/> <b>OPTION 1</b> <input type="checkbox"/> <b>OPTION 2</b> <input type="checkbox"/> <b>OPTION 3</b> <input type="checkbox"/> |   |   |                                   |   |                     |
| <b>Common Professional Services SRCL applies:</b>  | Common PS SRCL # <i>[Canada will select between 1 &amp; 31]</i> as defined by <a href="http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/31-eng.html">http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/31-eng.html</a> is being used for this requirement. |   |                                   |   |                     |

|  |  |
|--|--|
| <b>C OFFEROR'S RESPONSE INFORMATION</b>  |  |
| <i>[This section must be filled for every Offeror's Response]</i>  |  |
| <b>1. Offeror's signature and contact information:</b>   |  |
| Name of Offeror: _____   |  |
| Name of Authorized Signatory of Offeror _____  |  |
| Title of Authorized Signatory of Offeror _____   |  |
| Signature of Offeror _____   |  |
| Date of Signature of Offeror _____   |  |
| The Offeror identifies the following individual as the Contractor's Representative under the Contract:   |  |
| Name: _____  |  |
| Telephone: _____   |  |
| Facsimile: _____   |  |
| E-mail: _____  |  |
| <b>2. Certification: Education and Experience</b>  |  |
| By providing a response to this ACF, the Offeror certifies that all the information provided in the résumés and supporting material submitted with its response, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Offeror to be true and accurate. Furthermore, the Offeror warrants that every individual proposed by the Offeror for the requirement is capable of performing the Work described in the resulting contract. |  |



## 2. Mandatory Requirements

[Identify User: Insert details of mandatory]

Each proposed consultant must meet the requirement of the flexible grid associated with the category and level specified in section B.4. above.

Offeror Response \_\_\_\_\_

### 3. Where indicated as such below, it is mandatory that the following information be provided by the Offeror for each proposed resource [attach extra sheets as necessary]:

**Security Information:** [Offeror to insert data]

Name of individual as it appears on security clearance application form - **MANDATORY**

Date of birth – **OPTIONAL**

Level of security clearance obtained – **MANDATORY**

Validity period of security clearance obtained – **MANDATORY**

Security Screening Certificate and Briefing Form file number – **MANDATORY**

Name of the entity under which the security clearance was obtained – **MANDATORY**

If the security clearance is in the process, the date the application was submitted to CISD with the level of security clearance requested. – **OPTIONAL**

**5. The Offeror's resources for this requirement are as follows (Columns D, E and F will be completed by Contracting Authority prior to the Task Authorization form being validly issued):**  
[Canada will remove the tables that are not applicable]

#### CONTRACT PERIOD:

| [Offeror to insert or delete rows as required] |                           |                                    | Contract Period<br>[Date of Contract to YYYY-MM-DD] |                           |                         |
|--|---------------------------|------------------------------------|---|---------------------------|-------------------------|
| (A)<br>Category                                | (B)<br>Level of Expertise | (C)<br>Name of Proposed Consultant | (D)<br>Number of Days                               | (E)<br>Firm per diem rate | (F)<br>Total Cost [DxE] |
|  |                           |                                    |   | \$                        | \$                      |
|  |                           |                                    |   | \$                        | \$                      |
|  |                           |                                    |   | \$                        | \$                      |
| <b>Total Estimated Cost:</b>                   |                           |                                    |   |                           | <b>\$ [TBD]</b>         |

#### OPTIONAL CONTRACT PERIOD: [if applicable, otherwise delete table]

| [Offeror to insert or delete rows as required] |                           |                                    | Optional contract Period<br>[YYYY-MM-DD to YYYY-MM-DD] |                           |                         |
|--|---------------------------|------------------------------------|--|---------------------------|-------------------------|
| (A)<br>Category                                | (B)<br>Level of Expertise | (C)<br>Name of Proposed Consultant | (D)<br>Number of Days                                  | (E)<br>Firm per diem rate | (F)<br>Total Cost [DxE] |
|  |                           |                                    |  |                           |                         |



|                              |  |  |  |    |          |
|------------------------------|--|--|--|----|----------|
|                              |  |  |  | \$ | \$       |
|                              |  |  |  | \$ | \$       |
|                              |  |  |  | \$ | \$       |
| <b>Total Estimated Cost:</b> |  |  |  |    | \$ [TBD] |

**OPTIONAL WORK:** [if applicable, otherwise please delete table]

|                                      |                           |                                    |                       |                           |                         |
|--------------------------------------|---------------------------|------------------------------------|-----------------------|---------------------------|-------------------------|
| [Insert additional rows as required] |                           |                                    |                       |                           |                         |
|                                      | (B)                       | (C)                                | (D)                   | (E)                       | (F)                     |
| <b>Consultant Category</b>           | <b>Level of Expertise</b> | <b>Name of Proposed Consultant</b> | <b>Number of Days</b> | <b>Firm per diem rate</b> | <b>Total Cost [DxE]</b> |
|                                      |                           |                                    |                       | \$                        | \$                      |
|                                      |                           |                                    |                       | \$                        | \$                      |
|                                      |                           |                                    |                       | \$                        | \$                      |
| <b>Total Estimated Cost:</b>         |                           |                                    |                       |                           | \$ [TBD]                |

**Attachment A**  
**Bidder Profile/Centralized Professional Services System (CPSS) Supplier Module -**  
**Enrollment**

**As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.**

Bidders must enter the "Company Information" in the Data Collection Component (DCC) of CPSS.

To access CPSS, follow the link: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spc-cps-eng.html>

**Attachment B**  
**Supply Arrangement Technical Evaluation Criteria**

**Instructions to Bidders:**

The evaluation criteria contained in this Attachment B is divided into three sections as follows.

**As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.**

- 1)           **Section 1 – Technical Evaluation Criteria for Streams 1, 2, 3 and 5:**
  - Stream 1: Human Resource Services;
  - Stream 2: Business Services / Change Management Services;
  - Stream 3: Project Management Services; and
  - Stream 5: Technical Engineering and Maintenance (TEMS)
  
- 2)           **Section 2 – Technical Evaluation Criteria for Stream 4:**
  - Stream 4: Real Property Project Management Services.
  
- 3)           **Section 3 – Unsubstantiated Categories**

All Bidders must meet the mandatory requirements set out in this Attachment B by either:

- (a) demonstrating through the submission of proof in their bid that they meet the mandatory requirement, or
  
- (b) where permitted, providing the Grandfather Certification in Attachment E of this Solicitation signed by either its Chief Financial Officer, Chief Executive Officer or the Bidder's duly authorized representative. While a bid may incorporate by reference information already on file, all the requirements of this bid solicitation must be met by each Bidder by the date of bid submission unless otherwise specified.

By submitting an arrangement, Bidders are indicating that they consider themselves to be fully compliant in accordance with the mandatory requirements of this Attachment B, and will agree to the supply arrangement terms and conditions identified in Component II if a supply arrangement is issued to them.

As a result of the National Procurement Strategy for Professional Services, the Streams of the Technical Engineering and Maintenance (TEMS) Supply Arrangement (excluding the Telecommunications Stream) will be sunset once the evaluation of this solicitation is complete. One new Stream has been added to TSPS to replace the TEMS Streams (excluding the Telecommunications Stream). Any Bidder holding a TEMS SA (excluding the Telecommunications Stream) must comply with all the requirements of this bid solicitation (including submitting the applicable certifications and fulfilling all applicable TSPS mandatory requirements as described in this Attachment B) in order to be considered responsive.

All Bidders are advised that only listing experience i.e. copying and pasting the services from the Category descriptions detailed in Annex A SO/SA – Requirements for Services, without providing any supporting data to describe when, where and how such experience was obtained will not be considered to be "demonstrated" for the purpose of the evaluation. All professional experience must be fully documented and demonstrated in the arrangement.

Bidders must identify the Categories for each Tier that they are proposing to provide under any resulting SA.

Existing SA Holder are not required to re-qualify for any Categories for which they already have an SA although they must otherwise comply with the requirements of the refresh solicitation.

Example 1, Company ABC is an Existing SA Holder for 3 Categories in Stream 2 and does not wish to supply more Categories. The Existing SA Holder would not have to provide project summaries under B1-MTT2, but still need to complete the DCC.

Example 2, Company XDF is an Existing SA Holder for 6 Categories in Stream 2 and wish to supply more Categories in the same Stream and in Stream 1. The Existing SA Holder must comply with the mandatory criteria B1-MTT2 and B1-MTT3 for Stream 1 and 2.

**Bidders that have indicated that they wish to provide for both Tiers, and who meet the Mandatory Criteria of Tier 2 will be considered to have met the Mandatory Criteria of Tier 1.**

## **Section 1 - Mandatory Technical Criteria for Streams 1, 2, 3 and 5**

### Definitions for the purposes of Section 1:

An "Outside Client" is any legal entity that is not parent, subsidiary or affiliate of the Bidder, a member of a joint venture with the Bidder or any other entity that does not deal at arm's length with the Bidder.

A "Project" is a contractual agreement between the Bidder and an Outside Client under which the Bidder has provided professional services to the Outside Client and has fulfilled all of the requirements of the project with regards to the specific Category being examined. Different phases of a single contract may be cited in more than one project summary if that contract was a multi-phase Project with specific deliverables and distinct phases and if those phases associated with the concerned Category have all been completed between May 26, 2006 and the closing date of this bid solicitation.

For B1-MTT2, the following information **must**, as a minimum, be provided for each of the projects cited:

- Name of the Outside Client;
- Brief description of the Scope and Objective of the project clearly demonstrating the items of service description (four or more services) of the applicable Category listed in Annex A SO/SA - Requirements for Services;
- Start and end dates of the project (month/year to month/year);
- Project Value - total amount invoiced by the Bidder for the project (excluding travel and taxes);
- level of effort of Category shown by number of days;

The following information should, as a minimum, be provided for each of the projects cited:

- Name of the Outside Client reference including the reference's telephone number, fax number, and e-mail address (if available)

**TECHNICAL EVALUATION CRITERIA FOR STREAMS 1, 2, 3 and 5**

| <b>Mandatory Technical Criteria (MTT)</b>  |   |  |   |
|--|---|--|---|
| For the purpose of the mandatory technical criteria B1-MTT2 and B1-MTT3 the experience of the Bidder and its subcontractors, affiliates, subsidiaries and suppliers will be considered if the experience was obtained working on a project billed to the Bidder. |   |  |   |
| <b>Number</b>  | <b>TIER 1<br/>Mandatory Technical<br/>Criterion</b>   | <b>TIER 2<br/>Mandatory Technical<br/>Criterion</b>  | <b>Bid Preparation Instructions</b>   |
| <b>B1-MTT1</b>   | <p><b>Minimum years in business:</b><br/>The Bidder must have been in business for a minimum of 3 years as of the closing date of this bid solicitation.</p>  | <p><b>Minimum years in business:</b><br/>The Bidder must have been in business for a minimum of 3 years as of the closing date of this bid solicitation.</p>   | <p>In order to demonstrate this, the Bidder must provide proof (i.e. incorporation, business registration or tax returns) in its arrangement confirming the number of years its firm has been in business.</p>  |
| <b>B1-MTT2</b>   | <p><b>Project Summaries Per Stream:</b><br/>The Bidder must qualify for at least <b>2</b> Categories in any given <b>Stream</b> to be considered for their proposed Categories within that <b>Stream</b>.</p> <p>The Bidder must submit a minimum of 3 to a maximum of 6 different project summaries per <b>Stream</b> in which they are proposing to supply Categories.</p> <p>The projects must have been completed between May 26, 2006 and the closing date of this bid solicitation.</p> <p>These project summaries must demonstrate the Bidder has experience for at least 50% of the Categories for which the Bidder is proposing in that Stream. (In the case of an odd number of Categories proposed, the 50% is rounded upward so in order to propose to supply 3 Categories the Bidder must demonstrate 2 Categories and in order to propose to supply 5 Categories the Bidder must demonstrate 3 Categories.)</p> | <p><b>Project Summaries Per Stream:</b><br/>The Bidder must qualify for at least <b>4</b> Categories in any given <b>Stream</b> to be considered for their proposed Categories within that <b>Stream</b>.</p> <p>The Bidder must submit a minimum of 3 to a maximum of 6 different project summaries per <b>Stream</b> in which they are proposing to supply Categories.</p> <p>The projects must have been completed between May 26, 2006 and the closing date of this bid solicitation.</p> <p>These project summaries must demonstrate the Bidder has experience for at least 50% of the Categories in which the Bidder is proposing in that Stream. (In the case of an odd number of Categories proposed, the 50% is rounded upward so in order to propose to supply 3 Categories the Bidder must demonstrate 2 Categories and in order to propose to supply 5 Categories the Bidder must demonstrate 3 Categories.)</p> | <p>The Categories are defined in Annex A SO/SA – Requirements for Services of this RFSA.</p> <p>Bidders may demonstrate experience of multiple Categories in each project summary. However, at least 3 project summaries must be provided per applicable <b>Stream</b>, even if the Bidder is only proposing to supply 2 Categories in that <b>Stream</b>. Each of the project summaries must demonstrate at least 1 Category proposed in the <b>Stream</b>.</p> <p>A maximum of 6 project summaries per Stream will be evaluated. The Proposed project summaries will be evaluated in order of presentation. Proposed project summaries above the 'maximum' will not be evaluated.</p> <p>Project summaries should be provided using the Streams 1, 2, 3 and 5 Project Summary Template.</p> <p>References by Canada are acceptable.</p> |

|                |   |   |   |
|----------------|---|---|---|
|                | <p>Each project must have a minimum value of \$20,000.00 (excluding taxes and travel).</p> <p>Demonstrating Category experience in a given Project is defined as work demonstrating 4 or more services under the service descriptions of the applicable Category listed in Annex A –SO/SA – Requirements for Services.</p> <p>Total level of effort for a given Category within a project summary must be a minimum of 20 working days (7.5 hours equals 1 working day) level of effort (which must all have been completed between May 26, 2006 and the closing date of this bid solicitation.).</p> | <p>Each project must have a minimum value of \$50,000.00 (excluding taxes and travel).</p> <p>Demonstrating Category experience in a given Project is defined as work demonstrating 4 or more services under the service descriptions of the applicable Category listed in A SO/SA –Requirements for Services.</p> <p>Total level of effort for a given Category within a project summary must be a minimum of 20 working days (7.5 hours equals 1 working day) level of effort (which must all have been completed between May 26, 2006 and the closing date of this bid solicitation.).</p> | <p>A maximum of 5 call-ups on a same Standing Offer may be submitted to form a single Project providing the Standing Offer authorized to the Bidder includes professional services listed in Annex A SO/SA - Requirements for Services of this RFSA. More than 1 project can be formed using a maximum of 5 call-ups on the same Standing Offer.</p>  |
| <b>B1-MTT3</b> | <p><b>Substantive References Per Stream:</b></p> <p>A substantive reference must be provided by the Bidder for the remaining 50% or less of the Categories above the minimum in B1-MTT2 they propose to supply that were not covered by a project summary in B1-MTT2. The reference must confirm that the Bidder has provided the Category for a minimum level of effort of 20 working days (7.5 hours equals 1 working day) between May 26, 2006 and the closing date of this bid solicitation.</p>  | <p><b>Substantive References Per Stream:</b></p> <p>A substantive reference must be provided by the Bidder for the remaining 50% or less of the Categories above the minimum in B1-MTT2 they propose to supply that were not covered by a project summary in B1-MTT2. The reference must confirm that the Bidder has provided the Category for a minimum level of effort of 20 working days (7.5 hours equals 1 working day) between May 26, 2006 and the closing date of this bid solicitation.</p>  | <p>The Categories are defined in Annex A SO/SA – Requirements for Services of this RFSA.</p> <p>For each substantive reference, the Bidder should provide the following information: Outside Client Name, Contact Name, Telephone and E-mail address (if available).</p> <p>Multiple Categories may have the same substantiation reference.</p> <p>References should be provided using the Reference Template</p> <p>References by Canada are acceptable.</p> |

**For the purpose of B1-MTT1 for Section 1:**

If the Bidder has been incorporated or otherwise created less than 3 years as of the closing date of this bid solicitation, Canada will consider the 3 year minimum requirement to be met if the Bidder demonstrates to Canada's satisfaction that:

- a) it has been incorporated or otherwise created as the result of a corporate change under which it has in law assumed all of the assets, undertaking, operational capability, skills and resources of other legal entities;
- b) the corporate change was solely for tax or other purposes unrelated to the business of the other legal entities and does not affect the ability of the Bidder to carry on the business that had been carried on by the other legal entities;
- c) the Bidder has carried on the business of all of the other legal entities in the normal course, uninterrupted from and after the date of the corporate change;
- d) the Bidder, as at the closing date of this bid solicitation, maintains the same assets, undertaking, operational capability, skills and resources as the other legal entities had maintained before the corporate change; and
- e) the period that Bidder has been in business since it was created added to period that the other legal entities were in business before the corporate change totals a minimum of 3 years.

In these circumstances, Canada may require from the Bidder an unqualified legal opinion from an independent law firm stating that the Bidder legal entity meets all of the above requirements. Canada reserves the right to require other detail and material to verify that the above requirements are met. If Canada is not satisfied that the above requirements have been met, the Bidder legal entity's arrangement will be considered non-responsive.

Canada reserves the right to request proof of any information provided by the Bidder. If the information cannot be validated, the Bidder's Arrangement will be considered non-responsive.

**For Joint Ventures:**

In case of a JV, one member of the Joint Venture must meet the minimum 3-year requirement in B1-MTT1 and all other member(s) of the JV must have been in business for a minimum of 1 year as of the closing date of this bid solicitation.

**For the purposes of mandatory requirement B1-MTT2 and B1-MTT3:** Categories provided by any JV member will be considered and each JV member must have provided at least 1 of the Categories identified for a minimum of 20 working days (7.5 hours equals 1 working day) and must demonstrate with a project summary or substantiating reference.

**Process for the Migration of the TEMS SA (excluding the Telecommunications Services Stream) as new Streams of Categories into TSPS:**

Bidders who currently hold a TEMS SA (excluding the Telecommunications Services Stream), who wish to be considered for a Supply Arrangement, will be required to meet all TSPS mandatory criteria. The B1-MT2 Project Summaries per Stream and B1-MT3 Substantive references per Stream applies as explained below.

- a) B1-MT2 and B1-MT3 Migration process from the TEMS SA (excluding the Telecommunications Services Stream) to the Streams 2, 3 and 5 under TSPS:

- (i) Bidders who currently hold a TEMS SA (excluding the Telecommunications Services Stream) will be considered compliant under this bid solicitation for those TEMS Categories for which they were deemed technically compliant as a result of the previous TEMS technical evaluation solicitation number E60ZH-070002.
- (ii) The Bidder must meet the minimum categories requirement of Tier 1 and/or Tier 2 for each Stream of Services. Refer to mandatory criteria B1-MT2.
- (ii) If the Bidder wishes to be considered for more or all Categories, the Bidder must comply with B1-MT2, B1-MT3 and/or B2-MT2 and B2-MT3 the bid and will be subject to the TSPS renewal evaluation process.
- (iii) The Bidder will have the opportunity to apply for unsubstantiated categories, as explained in more details in Section 3.

**For the purpose of B1-MTT2:**

**Project Summary Template for Streams 1, 2, 3 and 5  
Project Summary #P\_\_**

|   |   |
|---|---|
| Brief description of the Scope and Objective of the project clearly demonstrating the items of service description (4 or more services) of the applicable Category listed in Annex A SO/SA - Requirements for Services. |   |
| (If the Bidder is a JV)<br>Name of the JV member who provided the services  |   |
| Outside Client Name   |   |
| Contact name  |   |
| Phone number  |   |
| Fax number  |   |
| E-mail address (if available)   |   |
| Address   |   |
| Start date (or phase of project)  | _____ (month/year)  |
| End Date (or phase of project)  | _____ (month/year)<br>If the end date is in the final month of the period please use (day/month/year) |
| Category: _____   | _____ days  |
| <u>Services from Category descriptions in Annex A SO/SA – Requirements for Services being demonstrated: (e.g. services #3, #6, #10, #5, ...)</u>  |   |
| _____   |   |
| Demonstration (simply copying and pasting the services from the Category descriptions detailed in Annex A <u>SO/SA – Requirements for Services</u> is not considered demonstrating):                                    |   |

|  |  |
|--|--|
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

**For the purpose of B1-MTT3: Reference Template**

Reference #R\_\_  
 Category (ies) \_\_\_\_\_

|   |  |
|---|--|
| Outside Client Name   |  |
| If the Bidder is a JV, name of the JV member who provided the services. |  |
| Contact name  |  |
| Phone number  |  |
| Fax number  |  |
| E-mail address (if available)   |  |

## Section 2 - Mandatory Technical Evaluation Criteria for Stream 4

### Definitions for the purposes of Section 2:

An "Outside Client" is any legal entity that is not an affiliate of the Bidder, a member of a joint venture with the Bidder or any other entity that does not deal at arm's length with the Bidder.

A "Real Property Project" is a project involving strategic analysis, planning, acquisition, management, construction, renovation or disposal of real property. Real Property is land and buildings (including leases).

The "value of a Real Property Project" is the actual or anticipated amount to be spent (received) on land and buildings upon the completion of the Real Property Project.

The "Professional Services Component" of a Real Property Project is a contractual agreement between the Bidder and an Outside Client under which the Bidder has provided Professional Services to the Outside Client and has fulfilled all of the Professional Services requirements with regards to the specific Category in Stream 4 being examined.

Different phases of a single Professional Services contract may be cited in more than one project summary if that contract was a multi-phase contract with specific deliverables and distinct phases and if those phases associated with the applicable Category have all been completed between May 26, 2006 and the closing date of this bid solicitation. Also, different phases of a single Real Property Project may be cited in more than one project summary if that Real Property Project was a multi-phase project with specific deliverables and distinct phases. The phases must be clearly identified in the project summary.

For B2-MTT2, the following information **must**, as a minimum, be provided for each of the **Real Property Projects** cited:

- Brief description of the Scope and Objective of the Real Property Project;
- Real Property Project Value; and

For B2-MTT2, the following information **must**, as a minimum, be provided for each of the **Professional Services Component** of the Real Property projects cited:

- Brief description of Professional Services Component of the Real Property Project clearly demonstrating the items of service description of the applicable Category listed in Annex A SO/SA – Requirements for Services;
- Name of the Outside Client;
- Start and end dates of the Professional Services Component of the Real Property project (month/year to month/year);
- Professional Services Component Value - total amount invoiced by the Bidder for the Professional Services Component of the Real Property Project (excluding travel and taxes); and
- Level of effort of Category shown by number of days;

The following information should, as a minimum, be provided for each of the Professional Services Component of the Real Property Projects cited;

- Name of the Outside Client reference including the reference's telephone number, fax number, and e-mail address (if available).

**Mandatory Technical Criteria (MTT) Stream 4: Real Property Project Management Services**

For the purpose of the mandatory technical criteria B2-MTT2 and B2-MTT3 the experience of the Bidder and its subcontractors, affiliates, subsidiaries and suppliers will be considered if the experience was obtained working on a Real Property Project billed to the Bidder.

| Number         | TIER 1<br>Mandatory Technical Criterion   | TIER 2<br>Mandatory Technical Criterion  | Bid Preparation Instructions   |
|----------------|---|--|--|
| <b>B2-MTT1</b> | <p><b>Minimum years in business:</b></p> <p>The Bidder must have been in business for a minimum of 3 years as of the closing date of this bid solicitation.</p>   | <p><b>Minimum years in business:</b></p> <p>The Bidder must have been in business for a minimum of 5 years as of the closing date of this bid solicitation.</p>  | <p>In order to demonstrate this, the Bidder must provide proof (i.e. incorporation, business registration or tax returns) in its arrangement confirming the number of years its firm has been in business.</p>   |
| <b>B2-MTT2</b> | <p><b>Project Summaries for Stream 4:</b></p> <p>The Bidder must submit a minimum of 3 to a maximum of 6 Project Summaries for Stream 4.</p> <p>A minimum of 3 different Real Property Projects must be submitted. Each Real Property Project must have a minimum value of \$5M.</p> <p>The Bidder must demonstrate through a brief description that the project is a Real Property Project</p> <p>The Professional Services Component of a Real Property Project must represent at least \$50,000 (not including taxes and travel).</p> <p>The Professional Services Component of the Real Property Projects must have been completed between May 26, 2006 and the closing date of this bid solicitation.</p> <p>The Bidder must qualify for at least 2 Categories in Stream 4, using project summaries to be considered for their proposed Categories within the Stream.</p> <p>Demonstrating Category experience in a given Project Summary is defined as work demonstrating 4 or more services listed under the services descriptions of the applicable</p> | <p><b>Project Summaries for Stream 4:</b></p> <p>The Bidder must submit a minimum of 3 to a maximum of 6 Project Summaries for Stream 4.</p> <p>A minimum of 3 different Real Property Projects must be submitted. Each Real Property Project must have a minimum value of \$10M.</p> <p>The Bidder must demonstrate through a brief description that the project is a Real Property Project</p> <p>The Professional Services Component of a Real Property Project must represent at least \$200,000 (not including taxes and travel).</p> <p>The Professional Services Component of the Real Property Projects must have been completed between May 26, 2006 and the closing date of this bid solicitation.</p> <p>The Bidder must qualify for at least 2 Categories in Stream 4, using project summaries to be considered for their proposed Categories within the Stream.</p> <p>Demonstrating Category experience in a given Project Summary is defined as work demonstrating 4 or more services listed under the services descriptions of the applicable Category detailed in Annex A SO/SA</p> | <p>The Categories are defined in Annex SO/SA – <u>Requirements for Services</u> of this RFSA.</p> <p>Bidders may demonstrate experience of multiple Categories in each project summary. However, a minimum 3 different project summaries must be provided, even if the Bidder is only proposing to supply 2 Categories. Each of the project summaries must demonstrate at least 1 Category.</p> <p>Maximum of 6 project summaries will be evaluated. The Proposed project summaries will be evaluated in order of presentation. Proposed project summaries above the 'maximum' will not be evaluated.</p> <p>Project summaries should be provided using the Stream 4 Project Summary Template.</p> <p>References by Canada are acceptable.</p> |

|                         |  |  |  |
|-------------------------|--|--|--|
|                         | <p>Category detailed in Annex A <u>SO/SA – Requirements for Services</u>. Where Category services description are broken down into 2 parts, Part A and Part B, a minimum of 2 of the 4 services must demonstrate in Part A service of the applicable Category services description.</p> <p>Total level of effort for a given Category within a project summary must be a minimum of 20 working days (7.5 hours equals 1 working day), which must have been completed between May 26, 2006 and the closing date of this bid solicitation.</p> <p>These project summaries must demonstrate the Bidder has experience for at least 50% of the Categories for which the Bidder is proposing in that Stream. (In the case of an odd number of Categories proposed, the 50% is rounded upward so in order to propose to supply 3 Categories the Bidder must demonstrate 2 Categories and in order to propose to supply 5 Categories the Bidder must demonstrate 3 Categories.)</p> | <p><u>– Requirements for Services</u>. Where Category services description is broken down into 2 parts, Part A and Part B, a minimum of 2 of the 4 services must demonstrate in Part A service of the applicable Category services description.</p> <p>Total level of effort for a given Category within a project summary must be a minimum of 20 working days (7.5 hours equals 1 working day), which must have been completed between May 26, 2006 and the closing date of this bid solicitation.</p> <p>These project summaries must demonstrate the Bidder has experience for at least 50% of the Categories for which the Bidder is proposing in that Stream. (In the case of an odd number of Categories proposed, the 50% is rounded upward so in order to propose to supply 3 Categories the Bidder must demonstrate 2 Categories and in order to propose to supply 5 Categories the Bidder must demonstrate 3 Categories.)</p> |  |
| <p><b>B2-MTT34:</b></p> | <p>A substantive reference must be provided by the Bidder for the remaining 50% or less of the Categories above the minimum in B2-MTT2 they propose to supply that were not covered by a project summary in B2-MTT2. The reference must confirm that the Bidder has provided the Category for a minimum Level of Effort of 20 working days (7.5 hours equals 1 working day) between May 26, 2006 and the closing date of this bid solicitation.</p>  | <p><b>Substantive References for Stream 4:</b></p> <p>A substantive reference must be provided by the Bidder for the remaining 50% or less of the Categories above the minimum in B2-MTT2 they propose to supply that were not covered by a project summary in B2-MTT2. The reference must confirm that the Bidder has provided the Category for a minimum Level of Effort of 20 working days (7.5 hours equals 1 working day) between May 26, 2006 and the closing date of this bid solicitation.</p>   | <p>The Categories are defined in Annex A <u>SO/SA – Requirements for Services</u> of this RFSA.</p> <p>For each substantive reference, the Bidder should provide the following information: Outside Client Name, Contact Name, Telephone and E-mail address (if available).</p> <p>Multiple Categories may have the same substantiation reference.</p> <p>References should be provided using the Reference Template</p> |

|  |  |  |                                      |
|--|--|--|--------------------------------------|
|  |  |  | References by Canada are acceptable. |
|--|--|--|--------------------------------------|

**For the purpose of B2-MTT1**

If the Bidder has been incorporated or otherwise created less than 3 years for B2-MTT1 Tier 1 and 5 years for B2-MTT1 Tier 2 as of the closing date of this bid solicitation, Canada will consider the minimum years requirement to be met if the Bidder demonstrates to Canada's satisfaction that:

- a) it has been incorporated or otherwise created as the result of a corporate change under which it has in law assumed all of the assets, undertaking, operational capability, skills and resources of other legal entities;
- b) the corporate change was solely for tax or other purposes unrelated to the business of the other legal entities and does not affect the ability of the Bidder to carry on the business that had been carried on by the other legal entities;
- c) the Bidder has carried on the business of all of the other legal entities in the normal course, uninterrupted from and after the date of the corporate change;
- d) the Bidder, as at the closing date of this bid solicitation, maintains the same assets, undertaking, operational capability, skills and resources as the other legal entities had maintained before the corporate change; and
- e) the period that Bidder has been in business since it was created added to period that the other legal entities were in business before the corporate change totals a minimum of 3 years for B2-MTT1 Tier 1 and 5 years for B2-MTT1 Tier 2.

In these circumstances, Canada may require from the Bidder an unqualified legal opinion from an independent law firm stating that the Bidder legal entity meets all of the above requirements. Canada reserves the right to require other detail and material to verify that the above requirements are met. If Canada is not satisfied that the above requirements have been met, the Bidder legal entity's arrangement will be considered non-responsive.

Canada reserves the right to request proof of any information provided by the Bidder. If the information cannot be validated, the Bidder's Arrangement will be considered non-responsive.

**For Joint Ventures:**

In case of a JV, one member of the Joint Venture must meet the minimum year requirement in B2-MTT1 (3 years for B2-MTT1 Tier 1 and 5 years for B2-MTT1 Tier 2) - and all other member(s) of the JV must have been in business for a minimum of 1 year as of the closing date of this bid solicitation.

**For the purposes of mandatory requirement B2-MTT2 and B2-MTT3:** Categories provided by any JV member will be considered and each JV member must have provided at least 1 of the Categories identified for a minimum of 20 working days (7.5 hours equals 1 working day) and must demonstrate with a Project Summary or substantiating reference.

**For the purpose of B2-MTT2:**

**Project Summary Template for Stream 4**

**Project Summary #P\_\_**

|   |   |
|---|---|
| <p>Brief description the Scope and Objective of the Real Property Project, clearly demonstrating this is a Real Property Project. (Simply copying and pasting the "Real Property Project" definition is not considered demonstrating)</p>   |   |
| <p>Real Property Project Value</p>  | <p>\$ _____</p>   |
| <p>Brief description of the Scope and Objective of the Professional Services Component of the Real Property Project including a detailed description of the professional services component.</p>  |   |
| <p>The Professional Services Component of the Real Property Project must represent at least \$50,000 for B2-MTT2 Tier 1 and \$200,000 for B2-MTT2 Tier 2 (not including taxes and travel).</p>  | <p>Professional Services Component Value \$ _____</p>   |
| <p>Start date of the Professional Services Component</p>  | <p>_____ (month/year)</p>   |
| <p>End Date of the Professional Services Component</p>  | <p>_____ (month/year)<br/>If the end date is in the final month of the period please use (day/month/year)</p> |
| <p>(If the bidder is a JV)<br/>Name of the JV member who provided the services</p>  |   |
| <p>Outside Client Name</p>  |   |
| <p>Contact name</p>   |   |
| <p>Phone number</p>   |   |
| <p>Fax number</p>   |   |
| <p>E-mail address (if available)</p>  |   |
| <p>Category: _____</p> <p><u>Services from Category descriptions in Annex A SO/SA – Requirements for Services being demonstrated: (e.g. services #3, #6, #10, #5, ...)</u></p> <p>_____</p> <p>Demonstration (simply copying and pasting the services from the Category descriptions detailed in Annex A <u>SO/SA – Requirements for Services</u> is not considered demonstrating):</p> <p>_____</p> <p>_____</p> | <p>_____ days</p>   |

|       |  |
|-------|--|
| _____ |  |
| _____ |  |
| _____ |  |
| _____ |  |

**For the purpose of B2-MTT3: Reference Template**

**Reference #R\_\_**  
 Category(ies): \_\_\_\_\_

|   |  |
|---|--|
| Outside Client Name   |  |
| If the bidder is a JV, name of the JV member who provided the services. |  |
| Contact name  |  |
| Phone number  |  |
| Fax number  |  |
| E-mail address (if available)   |  |
| Address   |  |

### **Section 3 - Unsubstantiated Categories**

Based on the number of Categories proposed by the Bidder within the same Stream in **B1-MTT2** and **B1-MTT3** and for **B2-MTT2** and **B2-MTT3** the Bidder may also propose to supply unsubstantiated Categories without providing a project summary or reference. The Bidder, however, is limited to a maximum number of unsubstantiated Categories equal to 50% of total proposed Categories within that Stream in **B1-MTT2** and **B1-MTT3** and for **B2-MTT2** and **B2-MTT3**. If a Bidder proposes an odd number the 50% will be calculated rounding downward to the next whole number (for instance 3.5 would be rounded downward to 3).

Example 1: Categories under the Business Services/Change Management Stream:  
If, under B1-MTT2 and B1-MTT3, Bidder B proposed to supply all 16 Categories under the Business Services / Change Management Stream, then no unsubstantiated Categories can be obtained under this Stream.

Example 2: Categories under the Human Resources Services Stream:  
If, under B1-MTT2 and B1-MTT3 Bidder C proposed to supply 6 of the 10 Categories under the Human Resources Services Stream, then Bidder C may obtain an additional 50% of unsubstantiated Categories.

Therefore, if all 6 are responsive, then an additional 3 Human Resources Services Categories can be obtained without a reference. Likewise, if only 5 of the 6 are responsive an additional 2 Human Resources Services Categories can be obtained as unsubstantiated Categories without a reference.

Example 3: Categories under the Real Property Project Management Services Stream:  
If, under B2-MTT2 and B2-MTT3 Bidder D proposed to supply 4 of the 7 Categories under the Real Property Project Management Services Stream, then Bidder D may obtain an additional 50% of unsubstantiated categories.

Therefore, if all 4 are responsive, then an additional 2 Real Property Project Management Services Categories can be obtained without a reference. Likewise, if only 3 of the 4 are responsive an additional 1 Real Property Project Management Services category can be obtained as unsubstantiated categories without a reference.

Bidders should prioritize (by numbering from highest priority to lowest) those requested Categories they are requesting without a substantive reference. Should the number of responsive Categories not be sufficient to allow for all not demonstrated Categories to be considered, only the not demonstrated Categories with the highest priority rating will be considered to maintain the 50% ratio.

**Attachment C**  
**Standing Offer Technical Evaluation Criteria**

**Instructions to Bidders:**

**As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.**

The evaluation criteria contained in Attachment C is divided into three sections as follows:

**1) Section 1 – Technical Evaluation Criteria for Streams 1, 2, 3 and 5:**

- Stream 1: Human Resource Services;
- Stream 2: Business Services / Change Management Services;
- Stream 3: Project Management Services; and
- Stream 5: Technical Engineering and Maintenance (TEMS)

**2) Section 2 – Technical Evaluation Criteria for Stream 4:**

- Stream 4: Real Property Project Management Services.

**3) Section 3 – Unsubstantiated Categories**

All Bidders must meet the mandatory requirements set out in this Attachment C by either:

- (a) demonstrating through the submission of proof in their bid that they meet the mandatory requirement, or
- (b) where permitted, providing the Grandfather Certification in Attachment E of this Solicitation signed by either its Chief Financial Officer, Chief Executive Officer or the Bidder's duly authorized representative. While a bid may incorporate by reference information already on file, all the requirements of this bid solicitation must be met by each Bidder by the date of bid submission unless otherwise specified.

By submitting an offer, Bidders are indicating that they consider themselves to be fully compliant in accordance with the mandatory requirements of this Attachment C, and will agree to the Standing Offer terms and conditions identified in Component III, if a Standing Offer is issued to them.

As a result of the National Procurement Strategy for Professional Services, the Streams of the Technical Engineering and Maintenance (TEMS) Supply Arrangement (excluding the Telecommunications Stream) will be sunset once the evaluation of this solicitation is complete. One new Stream has been added to TSPS to replace the TEMS Streams (excluding the Telecommunications Stream). Any Bidder holding a TEMS SA (excluding the Telecommunications Stream) must comply with all the requirements of this bid solicitation (including submitting the applicable certifications and fulfilling all applicable TSPS mandatory requirements as described in this Attachment C) in order to be considered responsive.

All Bidders are advised that only listing experience i.e. copying and pasting the services from the Category descriptions detailed in Annex A SO/SA – Requirements for Services, without providing any supporting data to describe when, where and how such experience was obtained will not be considered to be "demonstrated" for the purpose of the evaluation. All professional experience must be fully documented and demonstrated in the offer.

Existing SO Holder must identify the Categories that they are proposing to provide under any resulting SO.

Existing SO Holder are not required to re-qualify for any Categories for which they already have an SO although they must otherwise comply with the requirements of this RFSO.

Example 1, Company ABC is an Existing SO Holder for 3 Categories in Stream 2 and do not wish to offer more Categories. The Existing SO Holder would not have to provide project summaries under B1-MT2, but still need to complete the TSPS RFSO Technical Template.

Example 2, Company XDF is an Existing SO Holder for 6 Categories in Stream 2 and wish to offer more Categories in the same Stream and in Stream 1. Then the Existing SO Holder must comply with the mandatory criteria B1-MT2 and B1-MT3 for Stream 1 and 2.

### **Section 1 - Mandatory Technical Criteria for Streams 1, 2, 3 and 5**

#### Definitions for the purposes of Section 1:

An "Outside Client" is any legal entity that is not an affiliate of the Bidder, a member of a joint venture with the Bidder or any other entity that does not deal at arm's length with the Bidder.

A "Project" is a contractual agreement between the Bidder and an Outside client under which the Bidder has provided professional services to the Outside client and has fulfilled all of the requirements of the project with regards to the specific Category being examined. Different phases of a single contract may be cited in more than one project summary if that contract was a multiphase Project with specific deliverables and distinct phases and if those phases associated with the concerned category have all been completed **between May 26, 2006 and** the closing date of this bid solicitation.

For **B1-MT2** the following information **must**, as a minimum, be provided for each of the projects cited:

- Name of the Outside Client;
- Brief description of the Scope and Objective of the project clearly demonstrating the items of service description (four or more services) of the applicable Category listed in Annex A SO/SA – Requirements for Services.
- Start and end dates of the project (month/year to month/year);
- Project Value- total amount invoiced by the Bidder for the project (excluding travel and taxes );
- Level of effort of Category shown by number of days of services rendered;

The following information should as a minimum, be provided for each of the projects cited:

- Name of the Outside Client reference including the reference's telephone number, fax number, and e-mail address (if available).

**TECHNICAL EVALUATION CRITERIA FOR STREAMS 1, 2, 3 and 5**

| <b>Mandatory Technical Criteria (MT)</b>  |  |  |
|---|--|--|
| <p>For the purpose of the mandatory technical criteria B1-MT2 and B1-MT3 the experience of the Bidder and its subcontractors, affiliates, subsidiaries and Suppliers will be considered if the experience was obtained working on a project billed to the Bidder.</p> |  |  |
| <b>Number</b>   | <b>Mandatory Technical Criterion</b>   | <b>Bid Preparation Instructions</b>  |
| <b>B1-MT1</b>   | <p><b>Minimum years in business:</b></p> <p>The Bidder must have been in business for a minimum of three years as of the closing date of this bid solicitation.</p>  | <p>In order to demonstrate this, the Bidder must provide proof (i.e. incorporation, business registration or tax returns) in its offer confirming the number of years its firm has been in business.</p>   |
| <b>B1-MT2</b>   | <p><b>Project Summaries Per Stream:</b></p> <p>The Bidder must submit a minimum of three to a maximum of six different project summaries per Stream in which they are offering Categories.</p> <p>The projects must have been completed between May 26, 2006 and the closing date of this bid solicitation.</p> <p>These project summaries must demonstrate the Bidder has experience for at least 50% of the Categories for which the Bidder is offering in that Stream. (In the case of an odd number of Categories offered, the 50% is rounded upward so in order to offer 3 Categories the Bidder must demonstrate 2 Categories and in order to offer 5 Categories the Bidder must demonstrate 3 Categories ).</p> <p>Each Project must have a minimum value of \$20,000.00(excluding taxes and travel).</p> <p>Demonstrating Category experience in a given Project is defined as work demonstrating 4 or more services under the service descriptions of the applicable Category listed in Annex A SO/SA – Requirements for Services</p> <p>Total level of effort for a given Category within a project summary must be a minimum of 20 working days (7.5 hours equals 1 working day) level of effort (which must all have been completed between May 26, 2006 and the closing date of this bid solicitation).</p> | <p>The Categories are defined in Annex A SO/SA – Requirements for Services of this RFSO.</p> <p>Bidders may demonstrate experience of multiple Categories in each project summary. However, at least three project summaries must be provided per applicable Stream, even if the Bidder is only offering one Category in that Stream. Each of the project summaries must demonstrate at least one Category offered in the Stream.</p> <p>Project summaries should be provided using the Streams 1, 2 3 and 5 Project Summary Template.</p> <p>References by Canada are acceptable.</p> <p>A maximum of five call-ups on a same Standing Offer may be submitted to form a single Project providing the Standing Offer authorized to the Bidder includes professional services listed in Annex A SO/SA – Requirements for Services of this RFSO. More than one Project can be formed using a maximum of five call-ups on the same Standing Offer.</p> <p>Maximum of 6 project summaries per Stream will be evaluated. The proposed project summaries will be evaluated in order of presentation. Proposed project summaries above the 'maximum' will not be evaluated.</p> |
| <b>B1-MT3</b>   | <p><b>Substantive References Per Stream:</b></p>   | <p>The Categories are defined in Annex A to SO/SA – Requirements for Services of this</p>  |

|  |  |  |
|--|--|--|
|  | <p>A substantive reference must be provided by the Bidder for the remaining 50% or less of the Categories above the minimum in B1-MT2 they propose to offer that were not covered by a project summary in B1-MT2. The reference must confirm that the Bidder has provided the Category for a minimum Level of Effort of 20 working days (7.5 hours equals 1 working day) between May 26, 2006 and the closing date of this bid solicitation.</p> | <p>RFSO.</p> <p>For each substantive reference, the Bidder should provide the following information:<br/>         Outside Client Name, Contact Name, Telephone and E-mail address (if available). Multiple Categories may have the same substantiation reference.</p> <p>References should be provided using the Template.</p> <p>References by Canada are acceptable.</p> |
|--|--|--|

**For the purpose of B1-MT1:**

If the Bidder has been incorporated or otherwise created less than 3 years as of the closing date of this bid solicitation, Canada will consider the 3 year minimum requirement to be met if the Bidder demonstrates to Canada's satisfaction that:

- a. it has been incorporated or otherwise created as the result of a corporate change under which it has in law assumed all of the assets, undertaking, operational capability, skills and resources of other legal entities;
- b. the corporate change was solely for tax or other purposes unrelated to the business of the other legal entities and does not affect the ability of the Bidder to carry on the business that had been carried on by the other legal entities;
- c. the Bidder has carried on the business of all of the other legal entities in the normal course, uninterrupted from and after the date of the corporate change;
- d. the Bidder, as at the closing date of this bid solicitation, maintains the same assets, undertaking, operational capability, skills and resources as the other legal entities had maintained before the corporate change; and
- e. the period that Bidder has been in business since it was created added to period that the other legal entities were in business before the corporate change totals a minimum of 3 years.

In these circumstances, Canada may require from the Bidder an unqualified legal opinion from an independent law firm stating that the Bidder legal entity meets all of the above requirements. Canada reserves the right to require other detail and material to verify that the above requirements are met. If Canada is not satisfied that the above requirements have been met, the Bidder legal entity's offer will be considered non-responsive.

Canada reserves the right to request proof of any information provided by the Bidder. If the information cannot be validated, the Bidder's offer will be considered non-responsive.

**For Joint Ventures:**

In case of a JV, one member of the Joint Venture must meet the minimum three-year requirement in **B1-MT1** and all other member(s) of the JV must have been in business for a minimum of one year as of the closing date of this bid solicitation.

For the purposes of mandatory requirement B1-MT2 and B1-MT3: Categories provided by any JV member will be considered and each JV member must have provided at least one of the Categories identified for a minimum of 20 working days ( 7.5 hours equals one working day) and must demonstrate with a project summary or substantiating reference.

**Process for the Migration of the TEMS SA (excluding the Telecommunications Services Stream) as new Streams of Categories into TSPS:**

Bidders who currently hold a TEMS SA (excluding the Telecommunications Services Stream), who wish to be considered for a Standing Offer, will be required to meet all TSPS mandatory criteria including the submission of per diem rates into the Data Collection Component of CPSS. The C1-MT2 Project Summaries per Stream and C1-MT3 Substantive references per Stream applies as explained below.

- a) C1-MT2 and C1-MT3 Migration process from the TEMS SA (excluding the Telecommunications Services Stream) to the Streams 2, 3 and 5 under TSPS:
  - (i) Bidders who currently hold a TEMS SA (excluding the Telecommunications Services Stream) will be considered compliant under this bid solicitation for those TEMS Categories for which they were deemed technically compliant as a result of the previous TEMS technical evaluation solicitation number E60ZH-070002.
  - (ii) If the Bidder wishes to be considered for more or all Categories, the Bidder must comply with C1-MT2, C1-MT3 and/or C2-MT2 and C2-MT3 the bid and will be subject to the TSPS renewal evaluation process.
  - (iii) The Bidder will have the opportunity to apply for unsubstantiated categories, as explained in more details in Section 3.

**For the purpose of B1-MT2: Project Summary Template for Streams 1, 2, 3 and 5**

**Project Summary #P\_\_**

|  |  |
|--|--|
| <p>Brief description of the Scope and Objective of the project clearly demonstrating the items of service description (4 or more services) of the applicable Category listed in Annex A SO/SA – Requirements for Services.</p> |  |
| <p>(If the Bidder is a JV)<br/>Name of the JV member who provided the services</p>   |  |
| <p>Outside Client Name</p>   |  |
| <p>Contact name</p>  |  |
| <p>Phone number</p>  |  |

|  |  |
|--|--|
| Fax number   |  |
| E-mail address<br>(if available)   |  |
| Address  |  |
| Start date of project (or phase<br>of project)   | _____ (month/year)   |
| End Date of project (or phase<br>of project)   | _____ (month/year)<br>If the end date is in the final month of the period please use<br>(day/month/year) |
| Project Value - total amount<br>invoiced by the Bidder for the<br>project (excluding travel and<br>taxes)  | \$ _____   |
| <b>Category(ies) who worked on the project: and related service description<br/>(add extra lines if needed)</b>  | <b>Level of effort of<br/>category (# of<br/>days)</b>   |
| <u>Category:</u> _____<br><br>Services from Category descriptions in Annex A SO/SA – Requirements for<br>Services being demonstrated:<br>(e.g. services #3, #6, #10, #5, ...)<br><br><u>Demonstration:</u> (simply copying and pasting the services from the Category<br>descriptions detailed in Annex A SO/SA – Requirements for Services is not<br>considered demonstrating) :  | _____ days   |
| <u>Category:</u> _____<br><br>Services from Category descriptions in Annex A SO/SA – Requirements for<br>Services being demonstrated:<br>(e.g. services #3, #6, #10, #5, 9, ...)<br><br><u>Demonstration:</u> (simply copying and pasting the services from the Category<br>descriptions detailed in Annex A SO/SA – Requirements for Services is not<br>considered demonstrating) | _____ days   |
| <u>Category:</u> _____<br><br>Services from Category descriptions in Annex A SO/SA – Requirements for<br>Services being demonstrated:<br>(e.g. Services #3, #6,#10,#5,,...)  | _____ days   |
| <u>Demonstration</u> (simply copying and pasting the services from the Category<br>descriptions detailed in Annex A SO/SA – Requirements for Services is not<br>considered demonstrating)  |  |

|  |  |
|--|--|
|  |  |
|--|--|

**For the purpose of B1-MT3: Reference Template**

Reference #R\_\_  
 Category(ies) \_\_\_\_\_

|   |  |
|---|--|
| Outside Client Name   |  |
| If the Bidder is a JV, name of the JV member who provided the services. |  |
| Contact name  |  |
| Phone number  |  |
| Fax number  |  |
| E-mail address (if available)   |  |
| Address   |  |

Section 2 - Mandatory Technical Evaluation for Stream 4

**Definitions for the purposes of Section 2 of Attachment C:**

An "Outside Client" is any legal entity that is not an affiliate of the Bidder, a member of a joint venture with the Bidder or any other entity that does not deal at arm's length with the Bidder.

A "Real Property Project" is a project involving strategic analysis, planning, acquisition, management, construction, renovation or disposal of real property. Real Property is land and buildings (including leases).

The "value of a Real Property Project" is the actual or anticipated amount to be spent (received) on land and buildings upon the completion of the Real Property Project.

The "Professional Services Component" of a Real Property Project is a contractual agreement between the Bidder and an Outside Client under which the Bidder has provided Professional Services to the Outside Client and has fulfilled all of the Professional Services requirements with regards to the specific Category in Stream 4 being examined.

Different phases of a single Professional Services contract may be cited in more than one project summary if that contract was a multi-phase contract with specific deliverables and distinct phases and if those phases associated with the applicable Category have all been completed between May 26, 2006 and the closing date of this bid solicitation. Also, different phases of a single Real Property Project may be cited in more than one project summary if that Real Property Project was a multi-phase project with specific deliverables and distinct phases. The phases must be clearly identified in the project summary.

For B2-MT2, the following information **must**, as a minimum, be provided for each of the **Real Property Projects** cited:

- Brief description of the Scope and Objective of the Real Property Project;
- Real Property Project Value; and

For B2-MT2, the following information **must**, as a minimum, be provided for each of the **Professional Services Component** of the Real Property projects cited:

- Brief description of Professional Services Component of the Real Property Project clearly demonstrating the items of service description of the applicable Category listed in Annex A SO/SA – Requirements for Services;
- Name of the Outside Client;
- Start and end dates of the Professional Services Component of the Real Property Project (month/year to month/year);
- Professional Services Component Value - total amount invoiced by the Bidder for the Professional Services Component of the Real Property Project (excluding travel and taxes); and
- Level of effort of Category shown by number of days.

The following information should, as a minimum, be provided for each of the Professional Services Component of the Real Property Projects cited: Name of the Outside Client reference including the reference's telephone number, fax number, and e-mail address (if available).

| <b>Mandatory Technical Criteria (MT)</b>  |  |  |
|---|--|--|
| <p>For the purpose of the mandatory technical criteria B2-MT2 and B2-MT3 the experience of the Bidder and its subcontractors, affiliates, subsidiaries and Suppliers will be considered if the experience was obtained working on a project billed to the Bidder.</p> |  |  |
| <b>Number</b>   | <b>Mandatory Technical Criterion</b>   | <b>Bid Preparation Instructions</b>  |
| <b>B2-MT1</b>   | <p><b>Minimum years in business:</b></p> <p>The Bidder must have been in business for a minimum of three years as of the closing date of this bid solicitation.</p>  | <p>In order to demonstrate this, the Bidder must provide proof (i.e. incorporation, business registration or tax returns) in its offer confirming the number of years its firm has been in business.</p>   |
| <b>B2-MT2</b>   | <p><b>Project Summaries for Stream 4:</b></p> <p>The Bidder must submit a minimum of three to a maximum of six project summaries for Stream 4.</p> <p>A minimum of three different Real Property Projects must be submitted. Each Real Property Project must have a minimum value of \$1M.</p> <p>The Bidder must demonstrate through a brief description that the project is a Real Property Project.</p> <p>The Professional Services Component of a Real Property Project must represent at least \$20,000 (not including taxes and travel).</p> <p>The Professional Services Component of the Real Property Projects must have been completed between May 26, 2006 and the closing date of this bid solicitation.</p> <p>Demonstrating Category experience in a given project summary is defined as work demonstrating four or more services listed under the services descriptions of the applicable Category listed in Annex A SO/SA – Requirements for Services. Where Category services descriptions are broken down into two parts, Part A and Part B, a minimum of two of the four services must demonstrate in Part A service of the applicable Category services description.</p> <p>Total level of effort for a given Category within a project summary must be a minimum of 20 working days (7.5 hours equals one working day), which must have been completed between May 26, 2006 and the closing date of this bid solicitation.</p> <p>These project summaries must demonstrate</p> | <p>The Categories are defined in Annex A SO/SA – Requirements for Services of this RFSO.</p> <p>Bidders may demonstrate experience of multiple Categories in each Project Summary. However, a minimum of three different project summaries must be provided, even if the Bidder is only offering one Category. Each of the project summaries must demonstrate at least one Category.</p> <p>Maximum six project summaries will be evaluated. The Proposed project summaries will be evaluated in order of presentation. Proposed project summaries above the 'maximum' will not be evaluated.</p> <p>Project summaries should be provided using the Stream 4 Project Summary Template.</p> <p>References by Canada are acceptable.</p> |

|               |   |   |
|---------------|---|---|
|               | the Bidder has experience for at least 50% of the Categories for which the Bidder is offering. (In the case of an odd number of Categories offered, the 50% is rounded upward so in order to offer three Categories the Bidder must demonstrate two Categories and in order to offer five Categories the Bidder must demonstrate three Categories.)   |   |
| <b>B2-MT3</b> | <p><b>Substantive References for Stream 4:</b></p> <p>A substantive reference must be provided by the Bidder for the remaining 50% or less of the Categories above the minimum in B2-MT2 they propose to offer that were not covered by a project summary in B2-MT2. The reference must confirm that the Bidder has provided the Category for a minimum Level of Effort of 20 working days (7.5 hours equals one working day) between May 26, 2006 and the closing date of this bid solicitation.</p> | <p>Multiple Categories may have the same substantiation reference.</p> <p>References should be provided using the Reference Template.</p> <p>References by Canada are acceptable.</p> |

**For the purpose of B2-MT1**

If the Bidder has been incorporated or otherwise created less than 3 years as of the closing date of this bid solicitation, Canada will consider the minimum years requirement to be met if the Bidder demonstrates to Canada's satisfaction that:

- a. it has been incorporated or otherwise created as the result of a corporate change under which it has in law assumed all of the assets, undertaking, operational capability, skills and resources of other legal entities;
- b. the corporate change was solely for tax or other purposes unrelated to the business of the other legal entities and does not affect the ability of the Bidder to carry on the business that had been carried on by the other legal entities;
- c. the Bidder has carried on the business of all of the other legal entities in the normal course, uninterrupted from and after the date of the corporate change;
- d. the Bidder, as at the closing date of this bid solicitation, maintains the same assets, undertaking, operational capability, skills and resources as the other legal entities had maintained before the corporate change; and
- e. the period that Bidder has been in business since it was created added to period that the other legal entities were in business before the corporate change totals a minimum of 3 years.

In these circumstances, Canada may require from the Bidder an unqualified legal opinion from an independent law firm stating that the Bidder legal entity meets all of the above requirements. Canada reserves the right to require other detail and material to verify that the above

requirements are met. If Canada is not satisfied that the above requirements have been met, the Bidder legal entity's offer will be considered non-responsive.

Canada reserves the right to request proof of any information provided by the Bidder. If the information cannot be validated, the Bidder's Offer will be considered non-responsive.

**For Joint Ventures:**

In case of a JV, one member of the Joint Venture must meet the minimum three year requirement in B2-MT1 - and all other member(s) of the JV must have been in business for a minimum of one year as of the closing date of this bid solicitation.

For the purposes of mandatory requirement B2-MT2 and B2-MT3: Categories provided by any JV member will be considered and each JV member must have provided at least one of the Categories identified for a minimum of 20 working days (7.5 hours equals one working day) and must demonstrate with a project summary or substantiating reference.

**For the purpose of B2-MT2: Project Summary Template for Stream 4**

**Project Summary #P\_\_**

|  |  |
|--|--|
| Brief description the Scope and Objective of the Real Property Project, clearly demonstrating this is a Real Property Project. (Simply copying and pasting the "Real Property Project" definition is not considered demonstrating) |  |
| Real Property Project Value  | \$ _____   |
| Brief description of the Scope and Objectives of the Professional Services Component of the Real Property Project including a detailed description of the professional services component.   |  |
| The Professional Services Component of the Real Property Project must represent at least \$20,000 (not including taxes and travel).  | Professional Services Component Value<br>\$ _____  |
| Start date of the Professional Services Component  | _____ (month/year)   |
| End date of the Professional Services Component  | _____ (Month/year)<br>If the end date is in the final month of the 5 year period please use (day/month/year) |
| (if the Bidder is a JV)<br>Name of the JV member who provided the services   |  |
| Outside Client Name  |  |
| Contact Name   |  |
|  |  |

|  |  |
|--|--|
| Phone Number   |  |
| Fax Number   |  |
| E-mail Address   |  |
| Address  |  |
| <b>Category(ies) who worked on the project: and related service description<br/>(add extra lines if needed)</b>  | <b>Level of effort of<br/>category (# of<br/>days)</b> |
| <u>Category:</u> _____<br><br>Services from Category descriptions in Annex A SO/SA – Requirements for Services being demonstrated:<br>(e.g. services #3, #6, #10, #5, ...)<br><u>Demonstration:</u> (simply copying and pasting the services from the Category descriptions detailed in Annex A SO/SA – Requirements for Services is not considered demonstrating) :   | _____ days   |
| <u>Category:</u> _____<br><br>Services from Category descriptions in Annex A SO/SA – Requirements for Services being demonstrated:<br>(e.g. services #3, #6, #10, #5, ...)<br><br><u>Demonstration:</u> (simply copying and pasting the services from the Category descriptions detailed in Annex A SO/SA – Requirements for Services is not considered demonstrating) | _____ days   |
| <u>Category:</u> _____<br><br>Services from Category descriptions in Annex A SO/SA – Requirements for Services being demonstrated:<br>(e.g. Services #3, #6,#10, #5, ...)<br><br><u>Demonstration</u> (simply copying and pasting the services from the Category descriptions detailed in Annex A SO/SA – Requirements for Services is not considered demonstrating)   | _____ days   |

**For the purpose of B2-MT3: Reference Template**

Reference #R\_\_  
Category(ies): \_\_\_\_\_

|   |  |
|---|--|
| Outside Client Name   |  |
| If the Bidder is a JV, name of the JV member who provided the services. |  |
| Contact name  |  |
| Phone number  |  |
| Fax number  |  |
| E-mail address (if available)   |  |
| Address   |  |

### Section 3 - Unsubstantiated Categories

Based on the number of Categories offered by the Bidder within the same stream in **B1-MT2 and B1-MT3 and B2-MT2 and B2-MT3** the Bidder may also offer unsubstantiated Categories without providing a project summary or reference. The Bidder, however, is limited to a maximum number of unsubstantiated Categories equal to 50% of total offered Categories within that Stream in **B1-MT2 and B1-MT3 and B2-MT2 and B2-MT3**. If an Bidder proposes an odd number the 50% will be calculated rounding downward to the next whole number (for instance 3.5 would be rounded downward to 3).

Example 1: Categories under the Business Services/Change Management Stream:

If, under B1-MT2 and B1-MT3, Bidder B offered to provide all 16 Categories under the Business Services / Change Management Stream, then no unsubstantiated Categories can be offered under this stream.

Example 2: Categories under the Human Resources Services Stream:

If, under B1-MT2 and B1-MT3 Bidder C offers to provide 6 of the 10 Categories under the Human Resources Services Stream, then Bidder C may offer an additional 50%.

Therefore, if all 6 are responsive, then an unsubstantiated 3 Human Resources Services Categories can be offered without a reference. Likewise, if only 5 of the 6 are responsive an unsubstantiated 2 Human Resources Services Categories can be offered without a reference.

Example 3: Categories under the Real Property Project Management Services Stream: if, under B2-MT2 and B2-MT3 Bidder D proposed to offer 4 of the 7 Categories under the Real Property Project Management Services Stream, then Bidder D may offer an additional 50% of unsubstantiated categories.

Therefore, if all 4 are responsive, then an additional 2 Real Property Project Management Services Categories can be offered without a reference. Likewise, if only 3 of the 4 are responsive an additional 1 Real Property Project Management Services Categories can be offered as unsubstantiated categories without a reference.

Bidders should prioritize (by numbering from highest priority to lowest) those requested Categories they are requesting without a substantiated reference. Should the number of responsive Categories not be sufficient to allow for all not demonstrated Categories to be considered, only the not demonstrated Categories with the highest priority rating will be considered to maintain the 50% ratio.

## Attachment D – Standing Offer Financial Evaluation

**As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.**

If their bid contains an offer, bidders must submit a financial offer in response to this solicitation through the Data Collection Component of the CPSS. The financial offer will be evaluated in accordance with the financial evaluation methodology stated in this Attachment D. By submitting an offer, bidders are indicating that they consider themselves to be fully compliant to every requirement of this Attachment D and will agree to the standing offer terms and conditions identified in Component III if a standing offer is issued to them.

All financial evaluations will be based on firm per diem rates for each Level of Expertise for each Category offered in each Region or Metropolitan Area selected.

### 1. Provision of firm per diem rates

A Bidder's offer must contain per diem (daily) rates for:

- (i) all Categories it proposes to provide, as entered in the CPSS – Supplier Module – Enrollment (see Attachment A); and
- (ii) any or all corresponding Levels of Expertise within each proposed Category for which it wishes to be considered; and
- (iii) one or more Region(s) or Metropolitan area(s) for which it wishes to be considered.

Only those Categories, Levels of Expertise, Regions, and Metropolitan areas for which per diem rates are proposed will be evaluated. Bidders are not required to propose per diem rates for all Categories, nor are they required to propose per diem rates for all Levels of Expertise, Regions, or Metropolitan areas under a specific Category.

The per diem rates are to be firm, all-inclusive rates, GST or HST extra, as applicable. For Canadian-based bidders, per diem rates must include Canadian customs duties and excise taxes as applicable. For foreign-based bidders, per diem rates must include Canadian customs duties and excise taxes, as applicable.

**The firm per diem rates must:**

- a) include travel and living in Metropolitan Areas
- b) exclude travel and living in Regions

**As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.**

### 2. Conduct of Financial Evaluation

PWGSC will conduct a financial evaluation against all technically responsive bids by comparing the relative cost of the per diem rates in each Region and Metropolitan area for each Category and Level of Expertise.

Any offer proposing a per diem rate that falls between the "Median" minus 30% and the "Median" plus 30% for a specific Category and Level of Expertise within a Region and Metropolitan Area will be considered financially responsive and recommended for the issuance of a standing offer.

The "Median" will be calculated based on the per diem rates submitted by all bidders for that Category, Level, Region, and Metropolitan area. A "Median" is the middle offer in a set of offers whereby half the offers are greater and half are lower. For example in the following set of numbers: 100, 150, 200, 400, 900, the median would be 200, while the median minus 30% would be 140 and the median plus 30% would be 260. In the following set of numbers: 100, 150, 200, 300, 400, 900, the median would be 250, while the median minus 30% would be 175 and the median plus 30% would be 325.

Any offer proposing a Category and Level of Expertise with a per diem rate outside of that range will be considered financially non-responsive for that particular Category and Level of Expertise. If this Category and Level is technically compliant but financially non-responsive, this Category and level of expertise may be recommended for issuance within a standing offer as an "Inactive" Category

An "Inactive" Category will not be used by Canada to issue Call-ups for any requirements raised under the standing offers issued as a result of this bid solicitation. The purpose of issuing a Category with an "Inactive" status within a standing offer is to:

- enable the Bidder to reference such status in responding to re-competitions of this requirement, and
- enable the Bidder to demonstrate that, although the financial threshold was not met by the Bidder for that Category, technical compliance was achieved in its response to this solicitation.

For bidders proposing per diem rates that result in both "Active" and "Inactive" Categories, their offers will be considered responsive, and they will be recommended for the issuance of a standing offer. Each individual standing offer issued will specify the Categories in which the Bidder has obtained either "Active" or "Inactive" status.

If the Bidder proposes per diem rates that result in only "Inactive" Categories, within a Stream, a standing offer will not be recommended for issuance against such Stream.

If the Bidder proposes per diem rates that result in only "Inactive" Categories, no standing offer will be recommended for issuance.

## Attachment E

### Certifications/CPSS Supplier Module – Data Collection Component (DCC)

As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.

The relevant information for each Certification is located in Component I, Part 5 and in the CPSS Data Collection Component - Certifications.

#### 1. GRANDFATHER CERTIFICATION (Current TSPS Holders Only):

Bidders that were awarded a Supply Arrangement and/or Standing Offer in the last TSPS RFSA (E60ZN-110001/A) and/or RFSA (E60ZN-090002/B), who wish to rely on information submitted in response to E60ZN-110001/A and/or E60ZN-090002/B to demonstrate compliance in their bid with a mandatory criteria of this bid solicitation, must sign and submit in hard copy the following Grandfather Certification to the Bid Receiving Unit by the date of bid submission.

The Bidder certifies that, in respect of each of the following mandatory requirement(s), for its Standing Offer, Supply Arrangement or both:

- (i) it meets the mandatory requirement as of the date of bid submission. and;
- (ii) there exists information on file with the Standing Offer/Supply Arrangement Authority demonstrating that the Bidder has met the mandatory criteria as per the last TSPS RFSA E60ZN-110001/A and/or RFSA E60ZN-090002/B, and;
- (iii) all such information remains true, accurate and unchanged, and may be used for the purposes of this solicitation; and
- (iv) since the date the mandatory or certification was first met (as evidenced by the date of issuance of the supply arrangement and/or standing offer), the Bidder has continuously met at the date of bid submission all the qualification requirements related to the supply arrangement and/or standing offer necessary to remain an Offeror of the Services, and no arrangement or offer has been canceled by PWGSC or withdrawn by the Bidder

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

Print Name: \_\_\_\_\_

Legal Name of Bidder : \_\_\_\_\_

(Current Holders: Print, sign, and submit this Certification with the hard copy of your bid)

As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.

#### 2. BIDDERS STATEMENT (ALL BIDDERS)

All bidders must sign and submit the following "Bidder's Statement" with the hard copy of their bid to the Bid Receiving Unit by the date and, time of the date of bid submission:

We certify that all statements made with regard to these requirements are accurate and factual, and we are aware that the Department of Public Works and Government Services Canada reserves the right to verify any information provided in this regard. Untrue statements may result in the Bidder's proposal being declared non-compliant in its entirety, current TSPS SO/SA Holders becoming ineligible to receive further solicitations, and any other action which Canada may consider appropriate.

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

Print Name: \_\_\_\_\_

Legal Name of Bidder : \_\_\_\_\_  
(ALL BIDDERS: Print, sign, and submit this certification with the hard copy of your bid)

**ATTACHMENT F**  
**TECHNICAL RESPONSE TEMPLATE / CPSS SUPPLIER MODULE - DCC**

As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.

The "Data Collection Component" DCC of CPSS serves to replace the Technical Response Template.

The Data Collection Component of CPSS can be accessed through the CPSS website:  
<http://www.tpsqc-pwgsc.gc.ca/app-acq/spc-cps/spc-cps-eng.html>

**ATTACHMENT G**  
**FINANCIAL RESPONSE TEMPLATE / CPSS SUPPLIER MODULE - DCC**

As part of the Professional Services National Strategy the following section has changed to reflect the harmonization of business rules from what is currently in TSPS.

The "Data Collection Component" DCC of CPSS serves to replace the Financial Response Template.

To access the Data Collection Component of CPSS, follow the link: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spc-cps-eng.html>

## ATTACHMENT H

### STANDARD INSTRUCTIONS - REQUEST FOR STANDING OFFERS AND SUPPLY ARRANGEMENTS - COMPETITIVE REQUIREMENTS

#### General Information

- 01 Code of Conduct and Certifications - Bid
- 02 Procurement Business Number
- 03 Standard Instructions, Clauses and Conditions
- 04 Definition of Bidder
- 05 Submission of Bids
- 06 Late Bids
- 07 Delayed Bids
- 08 Transmission by Facsimile
- 09 Customs Clearance
- 10 Legal Capacity
- 11 Rights of Canada
- 12 Rejection of Bid
- 13 Communications - Solicitation Period
- 14 Bid Costs
- 15 Conduct of Evaluation
- 16 Joint Venture
- 17 Conflict of Interest - Unfair Advantage
- 18 Entire Requirement
- 19 Further Information

#### General Information

This bid solicitation solicits bids that may result in either a supply arrangement, a standing offer, or both. A supply arrangement and a standing offer are two types of instruments used as methods of supply by Public Works and Government Services Canada (PWGSC).

A standing offer is used to satisfy the requirements of departments and agencies by arranging with suppliers to submit a standing offer to provide goods, services or both during a specified period. Specific departments and agencies are then authorized by PWGSC to make call-ups against the standing offer detailing the exact quantities of goods or level of services they wish to order at a particular time, during the effective period of the standing offer in accordance with the predetermined conditions.

This bid solicitation is an invitation to suppliers to provide PWGSC with a bid which contains a standing offer. The quantity of goods, level of services and estimated expenditure specified in the bid solicitation are only an approximation of requirements given in good faith. The bid solicitation does not commit PWGSC to authorize the utilization of a standing offer or to procure or contract for any goods, services or both. The standing offer is not a contract. The issuance by PWGSC of a Standing Offer and Call-up Authority to successful suppliers and to departments

and agencies authorized to make call-ups does not constitute an agreement by Canada to order any or all of the goods, services or both offered. Departments and agencies may make one or several call-ups against a standing offer.

A supply arrangement is a method of supply that consists of an arrangement between Canada and pre-qualified suppliers that allows identified users to solicit bids from a pool of pre-qualified suppliers for specific requirements within the scope of the supply arrangement. A supply arrangement is not a contract for the provision of the goods and services described in it and neither party is legally bound as a result of signing a supply arrangement alone. The intent of a supply arrangement is to establish a framework to permit expeditious processing of individual bid solicitations which result in legally binding contracts for the goods and services described in those bid solicitations.

This bid solicitation is an invitation to suppliers to become pre-qualified suppliers by providing PWGSC with a bid which contains an arrangement to enable them to respond to individual bid solicitations issued under the supply arrangement framework. The list of pre-qualified suppliers will be used as a source list for procurement within the scope of the supply arrangement and only suppliers who are pre-qualified at the time a given bid solicitation is issued under the supply arrangement framework will be eligible to bid. The supply arrangement includes a set of predetermined conditions that will apply to subsequent bid solicitations and contracts. The supply arrangement may include ceiling prices which may be lowered based on an actual requirement or scope of work described in a bid solicitation.

## 01 Code of Conduct and Certifications - Bid

1. Bidders must comply with the [Code of Conduct for Procurement](#). In addition to the [Code of Conduct for Procurement](#), bidders must a) respond to bid solicitations in an honest, fair and comprehensive manner, b) accurately reflect their capacity to satisfy the requirements stipulated in the bid solicitations, resulting contracts and call-ups, and c) submit bids, offer arrangements, offer standing offers and enter into contracts and call-ups only if they will fulfill all obligations of such instruments.
2. Bidders further understand that, to ensure fairness, openness and transparency in the procurement process, the commission of certain acts or offences will render them ineligible to be issued an arrangement or offer, or to be awarded a call-up or contract. Canada will declare non-responsive any bid in respect of which the information herein requested is missing or inaccurate, or in respect of which the information contained in the certifications specified hereinafter is found to be untrue, in any respect, by Canada. If it is determined, after contract or call-up award, or after the issuance of a supply arrangement or standing offer, that the Bidder made a false declaration, Canada will have the right to terminate any or all of the Bidder's contracts or call-ups for default, set aside its standing offer and cancel its supply arrangement. The Bidder will be required to diligently maintain up-to-date the information herein requested. The Bidder and any of the Bidder's affiliates, will also be required to remain free and clear of any acts or convictions

specified herein during the period of any standing offer or supply arrangement arising from this bid solicitation as well as any resulting contracts or call-ups.

3. For the purpose of this section, everyone, including but not limited to organizations, bodies corporate, societies, companies, firms, partnerships, associations of persons, parent companies, and subsidiaries, whether partly or wholly-owned, as well as individuals, and directors, are Bidder's affiliates if:

directly or indirectly either one controls or has the power to control the other, or  
a third party has the power to control both.

Indicia of control, include, but are not limited to, interlocking management or ownership, identity of interests among family members, shared facilities and equipment, common use of employees, or a business entity created following the acts or convictions specified in this section which has the same or similar management, ownership, or principal employees, as the case may be.

4. Bidders who are incorporated, including those bidding as a joint venture, must provide with their bid or promptly thereafter a complete list of names of all individuals who are currently directors of the Bidder. Bidders bidding as sole proprietorship, including those bidding as a joint venture, must provide with their bid or promptly thereafter the name of the owner. Bidders bidding as societies, firms, or partnerships do not need to provide lists of names. If the required names have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply will render the bid non-responsive. Providing the required names is a mandatory requirement for contract award.

Canada may, at any time, request that a Bidder provide properly completed and Signed Consent Forms ([Consent to a Criminal Record Verification form - PWGSC-TPSGC 229](#)) for any or all individuals aforementioned within the time specified. Failure to provide such Consent Forms within the time period provided will result in the bid being declared non-responsive.

5. The Bidder must diligently maintain an up-to-date list of names by informing Canada in writing of any change occurring during the validity period of the bid as well as during the period of any contract arising from this bid solicitation. The Bidder must also, when so requested, provide Canada with the corresponding Consent Forms.
6. By submitting a bid, the Bidder certifies that it is aware, and that its affiliates are aware, that Canada may request additional information, certifications, consent forms and other evidentiary elements proving identity or eligibility. Canada may also verify the information provided by the Bidder, including the information relating to the acts or convictions specified herein, through independent research, use of any government resources or by contacting third parties.
7. By submitting a bid, the Bidder certifies that neither the Bidder nor any of the Bidder's affiliates have directly or indirectly, paid or agreed to pay, and will not, directly or

indirectly, pay a contingency fee to any individual for the solicitation, negotiation or obtaining of the Contract if the payment of the fee would require the individual to file a return under section 5 of the [Lobbying Act](#).

8. By submitting a bid, the Bidder certifies that no one convicted under any of the provisions under a) or b) are to receive any benefit under a contract arising from this bid solicitation. In addition, the Bidder certifies that except for those offences where a criminal pardon or a record suspension has been obtained or capacities restored by the Governor in Council, neither the Bidder nor any of the Bidder's affiliates has ever been convicted of an offence under any of the following provisions:

paragraph 80(1)(d) (*False entry, certificate or return*), subsection 80(2) (*Fraud against Her Majesty*) or section 154.01 (*Fraud against Her Majesty*) of the [Financial Administration Act](#), or

section 121 (*Frauds on the government and Contractor subscribing to election fund*), section 124 (*Selling or Purchasing Office*), section 380 (*Fraud*) for fraud committed against Her Majesty or section 418 (*Selling defective stores to Her Majesty*) of the [Criminal Code](#) of Canada, or

section 462.31 (*Laundering proceeds of crime*) or sections 467.11 to 467.13 (*Participation in activities of criminal organization*) of the [Criminal Code](#) of Canada, or

section 45 (*Conspiracies, agreements or arrangements between competitors*), 46 (*Foreign directives*) 47 (*Bid rigging*), 49 (*Agreements or arrangements of federal financial institutions*), 52 (*False or misleading representation*), 53 (*Deceptive notice of winning a prize*) under the [Competition Act](#), or

section 239 (*False or deceptive statements*) of the [Income Tax Act](#), or

section 327 (*False or deceptive statements*) of the [Excise Tax Act](#), or

section 3 (*Bribing a foreign public official*) of the [Corruption of Foreign Public Officials Act](#), or

section 5 (*Trafficking in substance*), section 6 (*Importing and exporting*), or section 7 (*Production of substance*) of the [Controlled Drugs and Substance Act](#).

9. In circumstances where a criminal pardon or a record suspension has been obtained, or capacities have been restored by the Governor in Council, the Bidder must provide with its bid or promptly thereafter a copy of confirming documentation from an official source. If such documentation has not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply will render the bid non-responsive.
10. Bidders understand that Canada may contract or issue an instrument outside of the present solicitation process with a supplier who has been convicted of an offense enumerated under c) to h) of the paragraph hereinabove, or who is affiliated with

someone who has been convicted of an offense enumerated under c) to h) of the paragraph hereinabove, when required to do so by law or legal proceedings, or when Canada considers it necessary to the public interest for reasons which include, but are not limited to:

- Only one person is capable of performing the contract;
- Emergency;
- National security;
- Health and safety;
- Economic harm;

Canada reserves the right to impose additional conditions or measures to ensure the integrity of the procurement process.

## 02 Procurement Business Number

Canadian suppliers are required to have a Procurement Business Number (PBN) before instrument award. Suppliers may register for a PBN online at Supplier Registration Information. For non-Internet registration, suppliers may contact the InfoLine at 1-800-811-1148 to obtain the telephone number of the nearest Supplier Registration Agent.

## 03 Standard Instructions, Clauses and Conditions

Pursuant to the Department of Public Works and Government Services Act (S.C.1996, c.16), the instructions, clauses and conditions identified in the bid solicitation and any resulting instrument by number, date, and title are incorporated by reference into and form part of the bid solicitation and resulting instrument as though expressly set out in the bid solicitation and resulting instrument.

## 04 Definition of Bidder

"Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid containing an instrument. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.

## 05 Submission of Bids

1. Canada requires that each bid, at closing date and time or upon request from the Offer/Arrangement Authority, be signed by the Bidder or by an authorized representative of the Bidder. If a bid is submitted by a joint venture, it must be in accordance with Section 17.

2. It is the Bidder's responsibility to:
  - (a) obtain clarification of the requirements contained in the bid solicitation, if necessary, before submitting a bid;
  - (b) prepare its bid in accordance with the instructions contained in the bid solicitation;
  - (c) submit by closing date and time a complete bid;
  - (d) send its bid only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit specified on page 1 of the bid solicitation or to the address specified in the bid solicitation. The facsimile number and related instructions for bids transmitted by facsimile are provided in Section 08;
  - (e) ensure that the Bidder's name, return address, the bid solicitation number, and bid solicitation closing date and time are clearly visible on the envelope or the parcel(s) containing the bid; and,
  - (f) provide a comprehensible and sufficiently detailed bid, including all requested pricing details, that will permit a complete evaluation in accordance with the criteria set out in the bid solicitation.
  
3. If Canada has provided bidders with multiple formats of a document (for example, a document may be downloaded through the Government Electronic Tendering Service (GETS) but may also be made available on CD-ROM through GETS), the format downloaded through GETS will take precedence. If Canada posts an amendment to the bid solicitation revising any documents provided to bidders in multiple formats, Canada will not necessarily update all formats to reflect these revisions. It is the Bidder's responsibility to ensure that revisions made through any bid solicitation amendment issued through GETS are taken into account in the alternate formats it uses of bid solicitation documents.
  
4. Bids will remain open for acceptance for a period of not less than two hundred and twenty (220) days from the closing date of the bid solicitation, unless specified otherwise in the bid solicitation. Canada reserves the right to seek an extension of the bid validity period from all responsive bidders in writing, within a minimum of three (3) days before the end of the bid validity period. If the extension is accepted by all responsive bidders, Canada will continue with the evaluation of the bids. If the extension is not accepted by all responsive bidders, Canada will, at its sole discretion, either continue with the evaluation of the bids of those who have accepted the extension or cancel the solicitation.
  
5. Bid documents and supporting information may be submitted in either English or French.

6. Bids received on or before the stipulated bid solicitation closing date and time will become the property of Canada and will not be returned. All bids will be treated as confidential, subject to the provisions of the Access to Information Act (R.S. 1985, c. A-1) and the Privacy Act (R.S., 1985, c. P-21).
7. Unless specified otherwise in the bid solicitation, Canada will evaluate only the documentation provided with a bidder's bid. Canada will not evaluate information such as references to Web site addresses where additional information can be found, or technical manuals or brochures not submitted with the bid.
8. A bid cannot be assigned or transferred in whole or in part.

#### 06 Late Bids

PWGSC will return bids delivered after the stipulated bid solicitation closing date and time, unless they qualify as a delayed bid as described below.

#### 07 Delayed Bids

1. A bid delivered to the specified bid receiving unit after the closing date and time but before the award date of the first instrument issued as a result of this bid solicitation may be considered, provided the bidder can prove the delay is due solely to a delay in delivery that can be attributed to the Canada Post Corporation (CPC) (or national equivalent of a foreign country). Purolator Inc. is not considered to be part of CPC for the purposes of delayed bids. The only pieces of evidence relating to a delay in the CPC system that are acceptable to PWGSC are:

- (a) a CPC cancellation date stamp; or
- (b) a CPC Priority Courier bill of lading; or
- (c) a CPC Xpresspost label

that clearly indicates that the bid was mailed before the bid closing date.

2. For bids transmitted by facsimile, only the date, time and place of receipt recorded by PWGSC will be accepted as evidence of a delayed bid.
3. Misrouting, traffic volume, weather disturbances, labour disputes or any other causes for the late delivery of bids are not acceptable reasons for the bid to be accepted by PWGSC.
4. Postage meter imprints, whether imprinted by the Bidder, the CPC or the postal authority outside Canada, are not acceptable as proof of timely mailing.

#### 08 Transmission by Facsimile

1. Unless specified otherwise in the bid solicitation, bids may be submitted by facsimile. The only acceptable facsimile number for responses to bid solicitations issued by

PWGSC headquarters is 819-997-9776 or, if applicable, the facsimile number identified in the bid solicitation. The facsimile number for responses to bid solicitations issued by PWGSC regional offices is identified in the bid solicitation.

2. For bids transmitted by facsimile, Canada will not be responsible for any failure attributable to the transmission or receipt of the faxed bid including, but not limited to, the following:
  - (a) receipt of garbled or incomplete bid;
  - (b) availability or condition of the receiving facsimile equipment;
  - (c) incompatibility between the sending and receiving equipment;
  - (d) delay in transmission or receipt of the bid;
  - (e) failure of the Bidder to properly identify the bid;
  - (f) illegibility of the bid; or
  - (g) security of bid data.
3. A bid transmitted by facsimile constitutes the formal bid of the Bidder and must be submitted in accordance with Section 05. The complete bid must be received by the bid closing date and time.

#### 09 Customs Clearance

It is the responsibility of the Bidder to allow sufficient time to obtain customs clearance, where required, before the bid closing date and time. Delays related to the obtaining of customs clearance cannot be construed as "undue delay in the mail" and will not be accepted as a delayed bid under Section 07.

#### 10 Legal Capacity

The Bidder must have the legal capacity to agree to the terms of an instrument. If the Bidder is a sole proprietorship, a partnership or a corporate body, the Bidder must provide, if requested by the Offer/Arrangement Authority, a statement and any requested supporting documentation indicating the laws under which it is registered or incorporated together with the registered or corporate name and place of business. This also applies to bidders submitting a bid as a joint venture.

#### 11 Rights of Canada

Canada reserves the right to:

- (a) reject any or all bids received in response to the bid solicitation;
- (b) enter into negotiations with bidders on any or all aspects of the standing offer contained in their bids;
- (c) authorize for utilization any standing offer in whole or in part without negotiations;

- (d) cancel the bid solicitation at any time;
- (e) reissue the bid solicitation; and
- (f) issue supply arrangements to bidders who qualify throughout the entire period of the supply arrangement on a quarterly basis.

## 12 Rejection of Bid

1. Canada may reject a bid where any of the following circumstances is present:

- (a) the Bidder is subject to a Vendor Performance Corrective Measure, under the Vendor Performance Policy, which renders the Bidder ineligible to bid on the requirement;
  - (b) an employee, or subcontractor included as part of the bid, is subject to a Vendor Performance Corrective Measure, under the Vendor Performance Policy, which would render that employee or subcontractor ineligible to bid on the requirement, or the portion of the requirement the employee or subcontractor is to perform;
  - (c) with respect to current or prior transactions with the Government of Canada
    - (i) the Bidder is bankrupt or where, for whatever reason, its activities are rendered inoperable for an extended period;
    - (ii) evidence, satisfactory to Canada, of fraud, bribery, fraudulent misrepresentation or failure to comply with any law protecting individuals against any manner of discrimination, has been received with respect to the Bidder, any of its employees or any subcontractor included as part of the bid;
    - (iii) Canada has exercised its contractual remedies of suspension or termination for default with respect to a standing offer, supply arrangement or contract with the Bidder, any of its employees or any subcontractor included as part of the bid;
    - (iv) Canada determines that the Bidder's performance on other standing offers, supply arrangements or contracts, including the efficiency and workmanship as well as the extent to which the Bidder performed the Work in accordance with the applicable clauses and conditions, is sufficiently poor to jeopardize the successful completion of the requirement being bid on.
2. Where Canada intends to reject a bid pursuant to a provision of subsection 1. (c), the Offer/Arrangement Authority will so inform the Bidder and provide the Bidder ten (10) days within which to make representations, before making a final decision on the bid rejection.

### 13 Communications - Solicitation Period

To ensure the integrity of the competitive bid process, enquiries and other communications regarding the bid solicitation must be directed only to the Offer/Arrangement Authority identified in the bid solicitation. Failure to comply with this requirement may result in the bid being declared non-responsive.

To ensure consistency and quality of information provided to bidders, significant enquiries received and the replies to such enquiries will be provided simultaneously to bidders to which the bid solicitation has been sent, without revealing the sources of the enquiries.

### 14 Bid Costs

No payment will be made for costs incurred in the preparation and submission of a bid in response to the bid solicitation. Costs associated with preparing and submitting a bid, as well as any costs incurred by the Bidder associated with the evaluation of the bid, are the sole responsibility of the Bidder.

### 15 Conduct of Evaluation

1. In conducting its evaluation of the bids, Canada may, but will have no obligation to, do the following:

- (a) seek clarification or verification from bidders regarding any or all information provided by them with respect to the bid solicitation;
- (b) contact any or all references supplied by bidders to verify and validate any information submitted by them;
- (c) request, before award of any resulting instrument, specific information with respect to bidders' legal status;
- (d) conduct a survey of bidders' facilities and/or examine their technical, managerial, and financial capabilities to determine if they are adequate to meet the requirements of the bid solicitation;
- (e) correct any error in the extended pricing of bids by using unit pricing and any error in quantities in bids to reflect the quantities stated in the bid solicitation; in the case of error in the extension of prices, the unit price will govern.
- (f) verify any information provided by bidders through independent research, use of any government resources or by contacting third parties;

(g) interview, at the sole costs of bidders, any bidder and/or any or all of the resources proposed by bidders to fulfill the requirement of the bid solicitation.

2. Bidders will have the number of days specified in the request by the Offer/Arrangement Authority to comply with any request related to any of the above items. Failure to comply with the request may result in the bid being declared non-responsive.

## 16 Joint Venture

1. A joint venture is an association of two or more parties who combine their money, property, knowledge, expertise or other resources in a single joint business enterprise, sometimes referred as a consortium, to bid together on a requirement. Bidders who bid as a joint venture must indicate clearly that it is a joint venture and provide the following information:

- (a) the name of each member of the joint venture;
- (b) the Procurement Business Number (PBN) of each member of the joint venture and the PBN of the joint venture itself;
- (c) the name of the representative of the joint venture, i.e. the member chosen by the other members to act on their behalf, if applicable;
- (d) the name of the joint venture, if applicable.

2. If the information is not clearly provided in the bid, the Bidder must provide the information on request from the Contracting Authority.

3. The bid and any resulting instrument must be signed by all the members of the joint venture unless one member has been appointed to act on behalf of all members of the joint venture. The Offer/Arrangement Authority may, at any time, require each member of the joint venture to confirm that the representative has been appointed with full authority to act as its representative for the purposes of the bid solicitation and resulting instrument. If an instrument is awarded to a joint venture, all members of the joint venture will be jointly and severally or solidarily liable for its performance.

## 17 Conflict of Interest - Unfair Advantage

1. In order to protect the integrity of the procurement process, bidders are advised that Canada may reject a bid in the following circumstances:

- (a) if the Bidder, any of its subcontractors, any of their respective employees or former employees was involved in any manner in the preparation of the bid solicitation or any situation of conflict of interest or appearance of conflict of interest;
- (b) if the Bidder, any of its subcontractors, any of their respective employees or former employees had access to information related to the bid solicitation that was not available to other bidders and that would, in Canada's opinion, give or appear to give the Bidder an unfair advantage.

2. The experience acquired by a bidder who is providing or has provided the goods and services described in the bid solicitation (or similar goods or services) will not, in itself, be considered by Canada as conferring an unfair advantage or creating a conflict of interest.

This bidder remains however subject to the criteria established above.

3. Where Canada intends to reject a bid under this section, the Offer/Arrangement Authority will inform the Bidder and provide the Bidder an opportunity to make representations before making a final decision. Bidders who are in doubt about a particular situation should contact the Offer/Arrangement Authority before bid closing. By submitting a bid, the Bidder represents that it does not consider itself to be in conflict of interest nor to have an unfair advantage. The Bidder acknowledges that it is within Canada's sole discretion to determine whether a conflict of interest, unfair advantage or an appearance of conflict of interest or unfair advantage exists.

#### 18 Entire Requirement

The bid solicitation documents contain all the requirements relating to the bid solicitation. Any other information or documentation provided to or obtained by a bidder from any source is not relevant. Bidders should not assume that practices used under previous instruments will continue, unless they are described in the bid solicitation. Bidders should also not assume that their existing capabilities meet the requirements of the bid solicitation simply because they have met previous requirements.

#### 19 Further Information

1. For further information, bidders may contact the Offer/Arrangement Authority identified in the bid solicitation.
2. For bid solicitations issued out of PWGSC headquarters, enquiries concerning receipt of bids may be addressed to the Bid Receiving Unit, Procurement Operational Support Division, telephone 819-956-3370. For bid solicitations issued out of PWGSC regional offices, enquiries concerning receipt of bids may be addressed to the Offer/Arrangement Authority identified in the bid solicitation.