

RETURN BIDS TO:

RETOURNER LES SOUMISSIONS À:

Bid Receiving - PWGSC/Réception des soumissions -
TPSGC

11 Laurier St./11, rue Laurier

Place du Portage, Phase III

Core 0A1/Noyau 0A1

Gatineau

Quebec

K1A 0S5

Bid Fax: (819) 997-9776

**Revision to a Request for Supply
Arrangement - Révision à une demande
pour un arrangement en matière
d'approvisionnement**

The referenced document is hereby revised; unless
otherwise indicated, all other terms and conditions of
the Solicitation remain the same.

Ce document est par la présente révisé; sauf
indication contraire, les modalités de l'invitation
demeurent les mêmes.

Comments - Commentaires

There is a security requirement with this document

Vendor/Firm Name and Address

Raison sociale et adresse du
fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution

Professional Services Online & Temporary Help
Services Division/Division des services
professionnels en ligne et d'aide temporaire

11 Laurier St./11, rue Laurier

10C1, Place du Portage III

Gatineau

Quebec

K1A 0S5

Title - Sujet PROSERVICES	
Solicitation No. - N° de l'invitation E60ZT-120001/D	Date 2013-05-01
Client Reference No. - N° de référence du client E60ZT-120001	Amendment No. - N° modif. 002
File No. - N° de dossier 009zt.E60ZT-120001	CCC No./N° CCC - FMS No./N° VME
GETS Reference No. - N° de référence de SEAG PW-\$\$ZT-009-25977	
Date of Original Request for Supply Arrangement 2013-04-18 Date de demande pour un arrangement en matière d'app. originale	
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2013-06-21	
Time Zone Fuseau horaire Eastern Daylight Saving Time EDT	
Address Enquiries to: - Adresser toutes questions à: Gilmour, Peggy	Buyer Id - Id de l'acheteur 009zt
Telephone No. - N° de téléphone (819) 956-7642 ()	FAX No. - N° de FAX (819) 956-9235
Delivery Required - Livraison exigée	
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction:	
Security - Sécurité This revision does change the security requirements of the solicitation. Cette révision change les besoins en matière de sécurité de l'invitation.	

Instructions: See Herein

Instructions: Voir aux présentes

Acknowledgement copy required Accusé de réception requis	Yes - Oui <input type="checkbox"/>	No - Non <input type="checkbox"/>
The Offeror hereby acknowledges this revision to its Offer. Le proposant constate, par la présente, cette révision à son offre.		
Signature	Date	
Name and title of person authorized to sign on behalf of offeror. (type or print) Nom et titre de la personne autorisée à signer au nom du proposant. (taper ou écrire en caractères d'imprimerie)		
For the Minister - Pour le Ministre		

Amendment 2

Reason for Amendment:

1. To provide contact information.
2. To announce an important notice for suppliers
3. Modify Attachment B - Supply Arrangement Technical Evaluation
4. To respond to questions asked by suppliers.
 - Solicitation questions are Questions 1 to Q25, and
 - Data Collection Component (DCC) questions are from Question 26 to Q36.
5. To add Stream 12 in the French RFSA. English remains unchanged.

1. **Additional questions may be submitted in writing to:**

Peggy Gilmour
 Supply Arrangement Authority
 PWGSC/STAMS/Online Services Division
 Telephone: 819-956-7642
 Email: RCNSpenligne-NCRPSONline@tpsgc-pwgsc.gc.ca

2. **Notice to Suppliers**

IMPORTANT NOTICE TO SUPPLIERS

Government of Canada is moving its Government Electronic Tendering Service from MERX to Buyandsell.gc.ca/tenders on June 1, 2013

Starting June 1, 2013, federal government tenders (tender notices and bid solicitation documents) will be published and available free of charge on a Government of Canada Web site on Buyandsell.gc.ca/tenders.

The Government Electronic Tendering Service on Buyandsell.gc.ca/tenders will be the sole authoritative source for Government of Canada tenders that are subject to trade agreements or subject to departmental policies that require public advertising of tenders.

Get more details in the Frequently Asked Questions section of Buyandsell.gc.ca/tenders. After June 1, 2013, all tenders and related documents and amendments will be on **Buyandsell.gc.ca/tenders**.

On June 1, 2013, suppliers must go to Buyandsell.gc.ca/tenders to check for amendments to any tender opportunities that they have been following on MERX prior to June 1.

Bookmark Buyandsell.gc.ca/tenders now to be ready for June 1!

3. **Modify Attachment B - Supply Arrangement Technical Evaluation**

Delete: Attachment B, In its entirety
 Insert: new Attachment B Rev. - Supply Arrangement Technical Evaluation

Reason for amendment is to revise the number of reference substantiations required under paragraph M.3.

4. **Questions and Answers:**

Solicitation questions:

- Q1.** I have recently incorporated a company offering professional services. This company that I operate alone does not meet the mandatory criteria of being in business for one year however, before incorporating the company, I was operating under my name as a sole proprietor. As a sole proprietor, I do meet all the criteria of the RFSA including the one year in business. For tax purposes, I cannot continue to operate as a sole proprietor as my volume of business has increased. How can I merge my experience as a sole proprietor into my newly incorporated company? Do you have a suggestion on how to resolve this issue?
- A1.** As per M.1 in Attachment B, Technical Evaluation, the Bidder must have carried on business as the same legal entity for a minimum of one year as of bid closing date. To demonstrate the requirement, a bidder must provide documented proof of its status (such as a certificate of incorporation, business registration or tax returns confirming the number of years it has been in business).
- Q2.** On page 47 of Annex A, at the beginning of the NON-IT streams listings there is mention of a Flexible Grid. There is a Grid for most of the categories. However, when we get to 10.10 technical writer and 10.11 communications consultant there is no grid. Is a grid needed or because we submitting only one project history and the 2 references for this category, therefore a grid is not relevant.
- A2.** Unless otherwise specified, the flexible grid applied to each category of a Stream is located at the beginning of each Stream listing. In this case, the flexible grid used for categories 10.10 and 10.11 is located at the beginning of the category list for Stream 10 at page 68 of Annex A.
- Q3.** The RFSA states "Under the field "Contract/Project Reference #, the Bidder must insert the contract/call up number which matches the title of the project which the Bidder has input in the field "Project Summary Number". I assume that this mainly applies to references in respect of contracts with the federal government. Many private sector organization do not necessarily number their contracts and the only reference might be a project description and date. Would this be satisfactory?
- A3.** Yes, as long as the Client can easily identify the project to substantiate it.
- Q4.** References will be asked to select a response such as "Yes" - the Bidder has provided my organization with the service(s) described above within the last five years from ____ date (date of bid solicitation issuance)."

My firm provided a resource (me) recently for 17 months work at PWGSC. The entity with the contractual relationship with PWGSC was a third-party who had no involvement in the actual delivery of the services and my firm was subcontracted them. You will be aware that this arrangement is extremely common in professional services, where the majority of such suppliers

to the Federal Government have few, if any, professional resources of their own and sub-contract work as a matter of course. The contractual documents between PWGSC and its vendor might make no reference even to the resource or firm that is actually delivering the professional services. Please can you confirm:

- a) That the entity providing the professional services resources (my firm in the above example) will be allowed to use such "sub-contracted" projects as substantiation
- b) That referees will be made aware that they can say "Yes, the Bidder has provided my organization with the service(s)" even though the contractual arrangement itself was between PWGSC and a third party.
- c) As a result of the Sub-contract business model that is common in professional services, you will also be aware that, based on the contents of the RFSA, both the prime contractor and the sub-contractor could claim the same project as substantiation. Is this your intent?

A4. a) Yes

b) We will substantiate the professional services that the Bidder has provided to the Client. In this example, we would not substantiate any contractual agreement between the Bidder's client and PWGSC.

c) Yes, this is our intent.

Q5. I noticed that in the RFP, at the Streams / Flexible Grid Non-IT part, the 9.15 Facilitator Category is missing.

A5. It was an oversight and the category has been added at Amendment 1.

Q6. We are a pre-qualified supplier under the TBIPS Standing Offer and Supply Arrangement. We will not be changing the Technical Offer which is already on file from the previous TBIPS Solicitation. Please confirm whether we need to complete the "Number of Months in Business" mandatory criterion appearing in the Mandatory Criteria section of the CPSS Supplier Module – DCC. If yes, must we also include a hard copy of proof of the number of years in business with our proposal?

A6. If you are a pre-qualified supplier under TBIPS and/or TSPS, you do not need to provide proof of "number of months in business".

Q7. Apart from possibly having to provide hard copy proof of the number of years in business, please confirm that the only document to be submitted via hard copy is Attachment E (Bidders Statement). Please also confirm that we do not have to submit a hard copy of the Grandfather Certification.

A7. If you are a pre-qualified supplier under TBIPS and/or TSPS, other than identifying which streams and categories you want to have grandfathered from TBIPS and/or TSPS, you need to select the Grandfather Certification checkbox in the DCC and include that selection in your electronic bid submission.

- Q8.** The RFC stipulates that a firm is only permitted 2 submissions. If you have a JV under TBIPS or TSPS and are going with a JV under ProServices it must be the same JV.
- We have our own TBIPS and TSPS and submitted on the most recent refresh under the grandfather provisions. We also entered into a new JV with an aboriginal firm and submitted for the most recent TBIPS. However we do not have the results of the evaluation yet so we do not know that if we will be awarded this vehicle with this JV. Given this situation - if we were to JV with another firm for *ProServices* and then we are approved with the previous JV for TBIPS - how will PWGSC determine our status. Will we be permitted to keep our single and both JV's or will we lose one?
- A8.** For each method of supply, there is a maximum of 2 bids generated from the same legal entity, for example 2 from TBIPS, 2 in TSPS, and only 2 for ProServices. Therefore only 2 can be grandfathered into ProServices, with the choice being the suppliers.
- Q9.** Have all Requirements for Services, i.e. the requirements for all Streams and all Categories, now been published?
- A9.** Yes, all have been published and are in the RFSA, as Annex A, Statement of Requirements and Amendment 1.
- Q10.** It is suggested that the front page of all solicitations be updated to reflect current practices by changing the field that reads "FAX No." to "Email".
- A10.** This is a pre-set form on the system and is not revisable.
- Q11.** Re: Section 2.2 Streams: Despite the tremendous importance of Enterprise Resource Planning (ERP) systems within the Federal Government and the highly specialized nature of the services/resources needed to run them, there is no Stream devoted to ERP and this category is woefully underrepresented within the existing IT Streams.
- A11.** ProServices merely reflects TBIPS and TSPS categories. In order to suggest additional categories/streams you would need to get in touch with the Task Based Informatics Professional Services (TBIPS) team, please contact RCNMDAI.-NCRIMOS@tpsgc-pwgsc.gc.ca.
- Q12.** Re: Part 3 – Arrangement Preparation Instructions: While Part 2 Supplier Instructions, Section 1.1 Bid Participation indicates that a "...pre-qualified supplier in TBIPS or TSPS can be grandfathered to ProServices...", the Arrangement Preparation Instructions make no reference to grandfathering (forms, process etc.). As such please consider modifying this section to include a Submission Grid that would make reference to the grandfathering approach in order to assist supplier with their bid preparation and submission. This practice was most helpful for the recent TBIPS Refresh and THS RFSA.
- A12.** There is no hard copy form required for Grandfathering. However, In the CPSS - Supplier Module, Data Collection Component, under Certifications there is a link to Grandfathering. A supplier must respond to this page, and also select the streams and categories that he has under TBIPS and/or TSPS.
- Q13.** RE: Part 5 – Supply Arrangement and Resulting Contract Clauses, Section 16: It is recommended that the term "National Zone" be defined in this section explicitly. It is a relatively

new concept and in the recent TBIPS Refresh there were many questions that related to clarifying this.

- A13.** The definitions of the different zones is listed on the front page of the Centralized Professional Services system under Professional Services Standardized Items at the following link:

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

- Q14.** In regard to RFI Amendment # 1 - page 74 of 82 - Annex A - 10.7 Procurement Specialist - Flexible Grid - Relevant Experience in Category, we strongly request the addition of an allocation threshold in recognition of resources with greater than 20 years (240+ months) of relevant experience. As it currently stands, a Senior Procurement Executive with over 20 years of relevant experience, who does not possess a University Degree or Certification, will not qualify as a Senior level resource under the Flexible Grid. Only 30% of Canadians today possess a degree and 20-30 years ago less than 20% of Canadians held a University education. We suggest that there is a sizeable and extremely qualified and experienced workforce, currently and previously providing procurement services, including those in Senior Executive positions within the Public Service, who would not be considered Senior resources, but who possess over 20-30 years of relevant experience in the field. These resources should be considered "Senior" under the current Flexible Grid. The purpose of the Flexible Grid is to establish minimum thresholds for the qualification of resources for a very broad mechanism. In issuing subsequent RFPs or call-ups, Client departments/agencies still retain the ability to add desired additional qualifications relevant to their specific requirements.

We strongly recommend PWGSC to add an additional allocation of points (i.e. 75+ points) to the 10.7 Procurement Specialist - Flexible Grid in recognition of extensive relevant procurement experience of 20+ years, for Canada to benefit from an experienced and knowledgeable workforce.

While our recommendation is framed from the perspective of the Procurement Specialist category (10.7), we suggest extensive experience (of 20+ years) could also be of benefit in other categories and merits consideration.

- A14.** ProServices merely reflects TBIPS and TSPS categories and cannot change experience. In order to suggest additional points/experience please go to either the Task Based Informatics Professional Services (TBIPS) team, please contact RCNMDAL-NCRIMOS@tpsgc-pwgsc.gc.ca or Task and Solutions Professional Services team, at tsps-spts@tpsgc-pwgsc.gc.ca.

- Q15.** Regarding the 10.7 Procurement Specialist - Category Specific Certifications, does PWGSC recognize a Certificate in Organizational Values and Ethics as a related and valid Procurement Specialist Certification?

- A15.** Professional Certifications are not required at the Request for Supply Arrangement solicitation stage. They will be used in a client's RFP to suppliers.

- Q16.** I have registered in the CPSS and would like to ensure I have an OSC. Earlier this month I applied for an OSC as part of responding to another RFP. Do I need to reapply with you?

- A16.** If you have already applied for an Organization Security Clearance, you do not need to reapply. However, you must submit this information the Data Collection Component under Certifications.

Q17. Questions re NAFTA:

- a) Is the NAFTA threshold a yearly amount or a single contract amount?
- b) If there are follow up contracts within one year, does the cumulative amount have to be below the NAFTA threshold, or must each individual contract be below the NAFTA threshold?
- c) For a single, multi-year contract, how is the NAFTA threshold applied

A17.

- a) The NAFTA threshold pertains for a single contract.
- b) Can not exceed the NAFTA threshold for contracts, therefore if at the maximum value can not do an additional contract/amendment for that contract.
- c) A single, multi-year contract can still not exceed the maximum under the NAFTA threshold.

Q18.

Since we don't know when you will be following up with client references, and it will be sometime over the summer, there is a possibility that both references could be on vacation at the same time. If you do not receive responses from our client references will you let us know in time to find another one who will be available during the time you are contacting them?

A18.

As per the solicitation, the procedures for conducting the reference substantiation process will be as follows:

- i. An email is sent to the first reference, as listed in the CPSS Supplier Module - DCC. In the event that no response is received from the first reference by the due date and time stated in the original email or indication is received via return email that the email sent to the first reference was improper (e.g. In error or no longer valid), or the first reference is absent for a period of time, the evaluation team will send the email to the second reference, as listed in the CPSS Supplier Module - DCC.
- ii If no response is received from the second reference by the due date and time indicated in the email, or if indication is received, via return email, that the email sent to the second reference was improper (e.g. In error or no longer valid), or the second reference is absent for a period of time, the reference check process will end. That particular Category will not be included in the Bidder's arrangement. The Bidder will be deemed non-responsive in that category and the category will not be included in the Bidder's arrangement. The Supplier can re-apply at the next refresh.

We will not be following up with suppliers for additional references nor with telephone calls.

Q19.

It was our understanding that the new ProServices SA would roll in the TBIPS and TSPS into the new ProServices SA and industry was informed that if we were already on the TBIPS and TSPS we would be grandfathered into the new ProServices SA. The TBIPS refresh closed recently, as did the THS; the ProServices SA is closing on May 21st and now a new TSPS SA has hit the street closing May 28, and we assume the SO will also be following soon. With all due respect, but you are imposing a tremendous amount of work on the industry and I am certain that we are all feeling frustration and work overload. If the intent of ProServices was to roll in TBIPS and TSPS as initially communicated why were we required to complete a TBIPS refresh and now required to refresh the TSPS SA? I have had discussions with colleagues in the industry and there is mass confusion out there regarding this ProServices SA. Yes we attended the supplier's conference and the information provided appeared quite clear but the issuing of the TSPS renewal has clouded everything. Please provide concise clarity on the intent of the ProServices SA and why we are required to re-submit for all the staffing SOs and SAs. It would have made

perfect sense to have industry apply for ProServices and those suppliers already in the system to be grandfathered from TBIPS and TSPS and not be required to re-qualify for everything again if grandfathering is the desired outcome.

- A19.** *ProServices* will be grandfathering current pre-qualified TBIPS and TSPS suppliers. These suppliers will have to certify under the grandfather certification in CPSS - Supplier Module, Data Collection Component, under certifications. These pre-qualified suppliers will have to check off each stream and category they are pre-qualified in within TBIPS and/or TSPS. They will not have to submit substantiation for the "currently substantiated" categories within TBIPS and/or TSPS. If a supplier wishes to offer new streams and categories, that is where they will have to substantiate the categories within *ProServices*. *ProServices* will not close until June 21, 2013. THS is not part of CPSS.
- Q20.** If a company does not submit a proposal for *ProServices* during this solicitation, when will the next opportunity take place?
- A20.** Once *ProServices* is in place, there will be perpetual refreshes, with evaluations quarterly.
- Q21.** RE: Bid Participation (Page 8) and elsewhere in the bid. The terminology around JV participation is very confusing. Could you please clarify the following scenarios?
- a) Company A is a supplier on TBIPS and TSPS. Company A is also part of a JV (JV A) on TBIPS, and part of another JV (JV B) on TSPS. Will Company A, JV A and JV B, all be able to participate in *ProServices*?
 - b) Company A is a supplier on TBIPS and TSPS. Company A is also part of a JV (JV A) on TBIPS, and part of another JV (JV B) on TSPS. JV A and JV B will not be participating on *ProServices*. Can Company A be a part of a new JV (JV C) which will bid on *ProServices*?
 - c) Company A is not a supplier on TBIPS and TSPS. However, Company A is part of a JV (JV A) on TBIPS, and part of another JV (JV B) on TSPS. JV A and JV B will participate in *ProServices*. Can Company A submit its own proposal for *ProServices*?
- A21.** As per answer 8 above, for each method of supply, there is a maximum of 2 bids generated from the same legal entity, for example 2 from TBIPS, 2 in TSPS, and only 2 for *ProServices*. Therefore only 2 can be grandfathered into *ProServices*, with the choice being the suppliers.
- a) No. Only two of the three will be able to participate in *ProServices*.
 - b) Yes.
 - c) No.
- Q22.** RE: Technical Arrangement – "For existing TSPS and TBIPS Suppliers (i.e. grandfathering)" Pages 11-12. Are existing suppliers also required to include the Code of Conduct – List of Directors or Owner? This is omitted from the items to be included in a submission from an existing supplier.
- A22.** It is not required from existing TBIPS and TSPS suppliers, as it would have been completed under the 2 methods of supply.

- Q23.** RE: M.2 (a) – Page 32: Projects must have been “within the last five years immediately prior to the date of closing of this bid solicitation”. What happens if the bid is extended? Does the window get extended or does it move with the extension? For clarity this should be tied to a fixed date – i.e. “since June 21, 2008”
- A23.** The requirement is for project within the last five years prior to the closing date of the bid solicitation. If the closing date is extended, it will remain five years prior to the closing date.
- Q24.** RE: B. Bid Solicitation, Item 2 Bid Solicitation Process, Item 2.1
- a) The second paragraph indicates a minimum of two suppliers, yet the third paragraph indicates that searches will automatically be extended to the regional level if there are less than 3 suppliers. Is that correct?
 - b) Will the client still be able to select only two suppliers to invite?
 - c) The following statement is included in this section: “Suppliers with local offices will also be displayed in a search result for a requirement less than \$25K”. Please confirm that this is in addition to the suppliers who are qualified and registered for the appropriate metropolitan area/region, i.e. the presence or non-presence of a local office will not restrict qualified suppliers from being displayed in searches.
- A24.**
- a) Yes, inviting a minimum of 2 suppliers is correct. The ePortal CPSS will automatically extend if less than 3 suppliers (i.e. $<3 = 2$) are at the regional level.
 - b) Yes
 - c) It is confirmed that all pre-qualified suppliers who meet the search criteria will appear in the search results. The presence or non-presence of a local office will not restrict pre-qualified suppliers from being displayed in searches.
- Q25.** RE: “Security Sponsorship” page in CPSS
- a) Where a bidder has already requested security sponsorship through the ProServices team, but has not already received their clearance, how should the bidder complete this section? Should the bidder enter the levels already requested or indicate that we are not requesting sponsorship?
 - b) Same scenario as #1 except that instead of requesting sponsorship through the ProServices team, it was requested through another solicitation.
- A25.**
- a) If you have already requested/received security sponsorship, you do not need to complete this section.
 - b) Once you have requested a security sponsorship from a method of supply you do not need to request another one. You will have to complete the Security information under the Certifications.

DCC Questions and Answers:

Q26. I have completed the data collection component under the CPSS dashboard. Is there other documentation that I need to request to complete this initiative? If so, I am requesting that the additional "solicitation and instructions" be sent to me as soon as possible. As well, in the data collection component there are two areas which indicate documentation is required but there is no opportunity to attach the documents (i.e. articles of incorporation, attachment E that needs to be signed).

A26. The following states where the instructions for submitting documentation is requested:
As per the solicitation under Part 3 Arrangement Preparation Instructions, Section 1:

the Bidder must submit to the PWGSC Bid Receiving Unit, one (1) hard copy of the following documents by the closing date, time, and location indicated on page one of this solicitation.

- the Bidder signed front page (Attachment E)
- proof of one year in business from date of bid closing, i.e. certificate of ownership or business registration or tax returns
- code of conduct:
 - ♦ if incorporated, a complete list of names of all individuals who are currently directors of the Supplier;
 - ♦ if a sole proprietorship, the name of the owner, and
- aboriginal certifications, if applicable.

These must be submitted to Bid Receiving Unit by closing date, time and location indicated on page 1 of the RFSA.

Q27. I am a bit confused a bit with data module and couldn't find the definition for following status for categories. We are registered before with PS Online and have categories already identified as service; now we are interested for same categories, than shall we indicate: Currently Substantiated? Please explain the following: Newly Substantiated, Currently Substantiated, Currently Unsubstantiated and Currently Unsubstantiated - Now substantiated

A27. As a PSOnline supplier, you will not be grandfathered into ProServices. You must submit a new technical proposal and enrol in Centralized Professional Services System (CPSS), Supplier Module, then complete the information requested under the Data Collection Component. Here is the link to CPSS: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spc-cps-eng.html> and the Supplier Easy Steps instructions: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/espfccd-sesdcc-eng.html>
As a new supplier, your categories to be offered will require either newly offered, or not offered in the Data Collection Component.

Q28. a) Please confirm that we need to complete the following items found in the Table of Contents Section in the CPSS Supplier Module – DCC:

- Company Information
- Regional Information (Region & Metropolitan Area selection)
- Mandatory Criteria – Stream Information
- Certifications, including the Bidder's Statement and the Grandfather Certification
- Services Offering for Supply Arrangement

-
- b) Please advise as to whether there are any other items in the CPSS Supplier Module – DCC which we are required to complete.
- A28.** a) Yes all Table of Content items in the response template must be completed. Below is a detailed list of the Table of Contents items.
- Company Information (includes the legal nature of your company and the applicable laws that will govern the solicitation)
 - Regional Information (National Zone/Region & Metropolitan Area selection as well as the assigning of contacts for the National Zone/Region & Metropolitan Areas, local office identifications and language preferences)
 - Mandatory Criteria - Stream Information (which includes the identification of categories and substantiation) and Months in Business
 - All Certifications included in this template, including the Bidder's Statement and the Grandfather Certification
 - Services Offering for Supply Arrangement (includes each level of expertise per category)
- b) No there are not any other items in the CPSS Supplier Module - DCC that you are required to complete other than what is included in the supplier response template.
- Q29.** We are currently in the process of selecting our categories in the CPSS Supplier Module – DCC. In the Instructions – General Section, the following statement appears: "The following drop down options do not apply to the ProServices MOs: "Currently unsubstantiated" and "Currently unsubstantiated – now substantiated". We are confused by this above statement, seeing how when we go to the Status drop down menu, both "Currently unsubstantiated" and "Currently unsubstantiated – now substantiated" appear.
- As a pre-qualified supplier under the TBIPS SO and AS, please advise as to how we should classify a given category which has an unsubstantiated award. We thought that we would classify this category as "Currently unsubstantiated," but it appears that we cannot do so according to the General Instructions. How we do address this requirement and still be compliant?
- A29.** As per the General Instructions in the DCC, pre-qualified suppliers under the TBIPS SO and SA should be identifying their TBIPS SO and SA unsubstantiated categories as "Currently Substantiated" for the ProServices response template in the Data Collection Component.
- Q30.** When we submitted for the TBIPS and TSPS SA and SO's, we were required to provide one project reference, the new ProServices asks for two references, if we are submitting for "Grandfathering" are we required to go back to each project previously submitted and provide a second reference or are we grandfathered with the one reference? If we are now required to provide a second reference, this would defeat the intent to grandfather those companies wishing to be grandfathered.
- A30.** If you are a pre-qualified supplier under TBIPS and/or TSPS, and are grandfathering into ProServices, you do not need to provide a second reference. You will be grandfathered using the one reference provided to either TBIPS and/or TSPS. There will be no need to provide any

references under ProServices for categories awarded to you through TBIPS and/or TSPS if you have selected the Grandfather certification within ProServices.

Q31. RE: Grandfather Certification

Could you please confirm that there is no requirement to print and sign the Grandfather Certification?

A31. That is correct, there is no requirement for a pre-qualified TBIPS and/or TSPS supplier to submit a hard copy of the Grandfather Certification. They must select the Grandfather Certification checkbox in the DCC and include that selection in your electronic bid submission.

Q32. RE: M.3 – Client Contacts – Page 32: In situations where work was done for an end client through a prime contractor, can bidders list the most suitable client contact – either a representative from the prime contractor or the end client? Since in many cases the end client is more familiar with the work that was done it makes a lot more sense to provide their name as a reference. In the past bidders on TSPS have been able to list both contacts in the form, and more recently bidders were able to provide one or the other for the TBIPS RFSA.

A32. As per the solicitation under Attachment B, Technical Evaluation, M.3. Paragraph 1 states: To demonstrate this reference substantiation, the Bidder must provide for each such Category Summary, one reference to be substantiated with an email address, for each Category, from a person who has never been employed by or acted as a consultant for the Bidder who can substantiate that the Professional Services were provided as required

Q33. RE: M.3 – Pages 32-33 – Two email addresses

a) My understanding based on the responses on the RFI was that it was not mandatory to include two email addresses, however, the term “must” is used at the start of the list of items to be provided. Is it mandatory? There are circumstances where finding one contact/email address will be challenging enough.

b) Where you are providing two email addresses, and those are for different individuals, should you indicate the two names/positions for the client contact fields?

c) With regards to “from the same company”. Please confirm that this does not restrict bidders from providing contacts who have moved positions/companies since the project took place.

A33. a) One email address is mandatory, however we strongly recommend the bidder provide a second email address. We have revised Attachment B, Technical Evaluation (attached) to indicate this. We will not do follow up telephone calls.

b) No, just an email address.

c) This does not restrict the bidder from providing contacts who have moved on, or retired. A personal email can be used, as long as the reference can substantiate the project.

Q34. RE: M.3 – Pages 32-33 – Contract/Project Reference #: Providing a Contract/Project Reference # is a major issue for bidders who are using private sector references as in many circumstance there is no such number. There isn't even a purchase order number usually, and invoice numbers are useless as clients will often not be aware of, or have the ability to search on invoice

numbers. After many questions and concerns on this topic on the recent TBIPS refresh, PWGSC finally removed it as a mandatory field. We ask that the same be done for ProServices.

A34. Any number can be used, as long as the reference can be substantiated.

Q35. RE: M.3 – Page 33 – Reference Letter(s)

Where a bidder chooses to submit reference letters, is it still required to enter the required information on the "Category – Substantiation" page in CPSS for those categories?

A35. If a bidder chooses to submit reference letters, all information required (a title, contract/project reference number and an email address to substantiate the category) must be included in the Category Substantiation page in the DCC, in addition to submitting the hard copy of the letter with the paper copy to be submitted to Bid Receiving Unit, at bid closing time.

Q36. Our question is concerning the pre-qualification rules surrounding the work streams under the *ProServices* RFSA: Context: Our organization is currently qualified under TBIPS, CPSA and TSPS Solutions Based supply arrangements.

The pre-qualification rules for the IT Streams 1 through 5 maps directly to our existing TBIPS categories; however, we are unclear on how to address the pre-qualification for Stream 6 Cyber Protection/IT Security Services. We are currently qualified under all CPSA Workstream 3 categories (have been since October 2006) and have submitted our response for the TBIPS Refresh which included the CPSA migration. Based on the migration rules under the TBIPS refresh we have applied for and expect to be awarded all categories on the Cyber Protection work stream of the TBIPS. Based on this, are we deemed pre-qualified under all 17 of the Cyber Protection categories for the *ProServices*? If not, how should this be addressed if the TBIPS refresh isn't awarded in time before the close of this RFSA solicitation? Similarly, we are qualified under TSPS Solutions Based SA under the Business Consulting/Change Management stream and Project Management Services stream. With this in mind does this mean that we are pre-qualified for all categories under the Non-IT Streams 9 and 10 for *ProServices*?

A36. Only currently pre-qualified suppliers under TBIPS and/or TSPS will be grandfathered into *ProServices*. You would have 2 options for additional streams/categories. First option would be to submit under ProServices as newly offered, or second option would be to wait for the next refresh for grandfathering for your additional streams/categories under TBIPS and/or TSPS.

ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.

Attachment B Revised

Supply Arrangement Technical Evaluation

All Bidders must meet the mandatory requirements set out in this Attachment B by demonstrating through the submission of proof in their bid that they meet the mandatory requirement.

M.1 Minimum Years in Business:

- (a) The Bidder must have carried on business as the same legal entity for a minimum of one year as of bid closing date. To demonstrate the requirement, a bidder must provide documented proof of its status (such as a certificate of incorporation, business registration or tax returns confirming the number of years it has been in business).
- (b) If the Bidder is a joint venture, one member of the joint venture must meet the one-year in business requirement. It must demonstrate this by the same method as (a) above.

M.2 Category Summary Substantiation

- (a) For each Category for which an arrangement is offered, a Bidder must provide contact information within the "Category References" section of the Data Collection Component, for one project per category that closely matches the services outlined for that Category as described in Annex A. The project must have been previously provided to a Client within the last five years immediately prior to the date of closing of this bid solicitation. There are no minimum number of Categories required per stream. This information, to be provided in CPSS Supplier Module - Data Collection Component, is explained in paragraph M.3 below
- (b) If the bidder is a joint venture, the bidder must provide contact information within the "Category References" section of the Data Collection Component, for one project per category, regardless of the number of members, that closely matches the services outlined for that Category as described in Annex A. The project must have been previously provided to a Client within the last five years immediately prior to the date of closing of this bid solicitation. There are no minimum number of Categories required per stream. This information, to be provided in the CPSS Supplier Module - DCC, is explained in paragraph M.3 below.

M.3 References Substantiation

1. To demonstrate this requirement, the Bidder must provide for each such Category Summary of M.2 above, one reference to be substantiated in the DCC with an email address, from a person who has never been employed by or acted as a consultant for the Bidder who can substantiate that the Professional Services were provided as required by this paragraph. It is recommended that a second reference as a backup from the same client be provided for each Category.

The Bidder must input the following information in the CPSS Supplier Module - DCC under Category substantiation:

- Select all the streams you wish to offer, complete and save.

-
- Select the categories under the stream you wish to offer. All categories relevant to that particular stream will be listed in a table.
 - On the Category - Substantiation page, you must substantiate your category as follows:
 - ♦ under the heading "Category Summaries", in the field "Project Summary Number", insert the title of the project that closely matches the services outlined for that Category
 - ♦ Under the heading "Category References", the Bidder must complete the fields of "Client (Government Department/Company Name)", "Contact Name", "Position", and "Telephone"

One email address for each Category must be provided, and it is recommended that a second email address from the same client be provided. These email addresses will be used to conduct reference(s) substantiation in accordance with item 4 below.

 - ♦ Under the field "Contract/Project Reference #, the Bidder must insert the contract/call up number which matches the title of the project which the Bidder has input in the field "Project Summary Number".

Written reference letter(s) can be used to complete the above. The letter information must be inserted in the Data Collection Component and include the category, a title, contract/project reference #, and an email address to substantiate the letter. This letter must be provided with the paper copy of the bid submitted to Bid Receiving Unit (BRU) at bid closing date and time.

The same applies to Joint Venture bidders.

2. If the bidder is a joint venture, to demonstrate this requirement the Bidder must provide for each Category of M2, one email address for each Category, and a second email address from the same client can be provided, who have never been employed by or acted as a consultant for the Bidder. These email addresses are for persons who can substantiate that the Professional Services were provided as required by paragraph 1 above.
3. The Bidder must submit the category reference substantiation details for the category within the Data Collection Component of the CPSS Supplier Module.
4. For each Category, substantiating information will be obtained based on an e-mail containing the following information, sent in accordance with the procedures detailed in item 5 below.

"Public Works and Government Services Canada has received a bid from (Insert Bidder's legal name) to provide informatics/non informatics professional services to the federal government. As part of PWGSC's evaluation process, your name and contact information were provided by the Bidder as the project reference that could substantiate that the Bidder has provided professional services that:

- (a) closely match the Categories listed in the table below.

(For a description of the Categories, please see the following link

For IT: <http://www.tpsgc.gc.ca/app-acq/sptb-tbps/categories-eng.html> **OR**

For Non-IT: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spctsc-tpscc-eng.html>)

- (b) these services were provided within the past five years from (Insert date of issuance of the solicitation).

Please indicate which option applies for each Category listed below:

Options: Name of category(s), project title, contract/call up number and joint venture name:

"Yes" - the Bidder has provided my organization with the service(s) described above within the last five years from ____ date (date of bid solicitation issuance).

"No" - the Bidder has not provided my organization with the service(s) described within the last five years from ____ date (date of bid solicitation issuance).

"U" - I am unwilling or unable to provide any information about the listed services.

NOTE: If you are or have been employed by or acted as a consultant for the Bidder, this option "U" is the most appropriate response.

Should you have any questions regarding this reference substantiation process, please do not hesitate to contact the undersigned."

5. The procedures for conducting the reference substantiation process will be as follows:

i. An email containing the content detailed in item 4 above, is sent to the first reference, as listed in the CPSS Supplier Module - DCC. In the event that no response is received from the first reference by the due date and time stated in the original email or indication is received via return email that the email sent to the first reference was improper (e.g. In error or no longer valid), or the first reference is absent for a period of time, the evaluation team will send the email containing the content detailed in item 4 above, to the second reference, as listed in the CPSS Supplier Module - DCC.

ii. If no response is received from the second reference by the due date and time indicated in the email, or if indication is received, via return email, that the email sent to the second reference was improper (e.g. In error or no longer valid), or the second reference is absent for a period of time, the reference check process will end. That particular Category will not be included in the Bidder's arrangement. The Bidder will be deemed non-responsive in that category and the category will not be included in the Bidder's arrangement. The Supplier can re-apply at the next refresh.

6. The response received from a reference will be used to determine the inclusion in the arrangement of each Category as follows:

i. The reference indicates a "Yes" relating to the Category requested: This substantiates the Category and the Bidder's arrangement will include that Category if all other requirements are met.

ii. The reference indicates a "No" or "U" relating to a Category requested: This does not substantiate the reference and that particular Category will not be included in the Bidder's arrangement.

7. In the event both references decline the reference substantiation process for that category, the Supplier will be deemed non-responsive in that category. The Supplier can re-apply at the next refresh.

CATEGORIES	
IT	
STREAM #1 - (A) Application Services	
1.1 Application/Software Architect	1.10 Test Coordinator
1.2 ERP Functional Analyst	1.11 Tester
1.3 ERP Programmer Analyst	1.12 WEB Architect
1.4 ERP System Analyst	1.13 WEB Designer
1.5 ERP Technical Analyst	1.14 WEB Developer
1.6 Programmer/Software Developer	1.15 WEB Graphics Designer
1.7 Programmer/Analyst	1.16 WEB Multimedia Content Consultant
1.8 System Analyst	1.17 Webmaster
1.9 System Auditor	
STREAM #2 - (G) Geomatics Services	
2.1 Geomatics Analyst	2.7 GIS Programmer/Analyst
2.2 Geomatics Specialist	2.8 GIS Project Manager
2.3 GIS Applications Analyst	2.9 GIS System Architect
2.4 GIS Applications Architect	2.10 GIS Web Mapping Developer
2.5 GIS Data Architect	2.11 Mapping Technician
2.6 GIS Infrastructure Architect	
STREAM #3 - (I) IM/IT Services	
3.1 Data Conversion Specialist	3.7 Platform Analyst
3.2 Database Administrator	3.8 Storage Architect
3.3 Database Analyst	3.9 System Administrator
3.4 Database Modeller / IM Modeller	3.10 Technical Architect
3.5 IM Architect	3.11 Technology Architect
3.6 Network Analyst	
STREAM #4 - (B) Business Services	
4.1 Business Analyst	4.8 Call Centre Consultant
4.2 Business Architect	4.9 Courseware Developer **
4.3 Business Consultant	4.10 Help Desk Specialist
4.4 Business Continuity/Disaster Recovery Specialist	4.11 Instructor, IT **
4.5 Business Process Re-engineering (BPR) Consultant	4.12 Network Support Specialist
4.6 Business System Analyst	4.13 Operations Support Specialist
B.7 Business Transformation Architect	4.14 Technical Writer
** To be used for IT courseware and instructor requirements only. Non-IT courseware & instructor requirements must be processed through the Learning Services Supply Arrangement E60ZH-070003	

Solicitation No. - N° de l'invitation

E60ZT-120001/D

Amd. No. - N° de la modif.

002

Buyer ID - Id de l'acheteur

009zt

Client Ref. No. - N° de réf. du client

E60ZT-120001

File No. - N° du dossier

009ztE60ZT-120001

CCC No./N° CCC - FMS No/ N° VME

STREAM #5 - (P) Project Management Services

5.1 Change Management Consultant

5.2 Enterprise Architect

5.3 HR Consultant

5.4 Organizational Development Consultant

5.5 Project Executive

5.6 Project Administrator

5.7 Project Coordinator

5.8 Project Leader

5.9 Project Manager

5.10 Project Scheduler

5.11 Quality Assurance Specialist/Analyst

5.12 Risk Management Specialist

STREAM #6 - (C) Cyber Protection Services

6.1 Strategic IT Security Planning & Protection Consultant

6.2 IT Security Methodology, Policy and Procedures Analyst

6.3 IT Security TRA and C&A Analyst

6.4 IT Security Product Evaluation Specialist

6.5 PKI Specialist

6.6 IT Security Engineer

6.7 IT security Design Specialist

6.8 Network Security Analyst

6.9 IT Security Systems Operator

6.10 IT Security Installation Specialist

6.11 IT Security VA Specialist

6.12 Incident Management Specialist

6.13 Physical IT Security Specialist

6.14 IT Security R&D Specialist

6.15 Computer Forensics Specialist

6.16 PIA Specialist

6.17 EMSEC Security Specialist

STREAM #7 - (T) Telecommunications Services

7.1 Radio Frequency (RF) Systems Specialist

7.2 Satellite Communication Specialist

7.3 Telecommunication Cable Plant Designer

7.4 Telecommunication Technician

7.5 Private Branch Exchange (PBX) Technologist

7.6 Telecommunication System Specialist

7.7 Antenna Structure Engineer

7.8 Radio Frequency (RF) Engineer

7.9 Lineman Technician

Non IT**STREAM #8 - Human Resources Services**

8.1 Human Resources Consultant

8.2 Organizational Design & Classification Cons.

8.3 Employment Equity Consultant

8.4 Employee Relation Consultant

8.5 Compensation Consultant

8.6 HR Information System Consultant

8.7 Leadership Development Consultant

8.8 Staffing Consultant

8.9 HR Policy Development Consultant

8.10 HR Assistant Consultant

STREAM #9 - Business Consulting/Change Management

9.1 Business Analyst

9.2 Business Continuity Consultant

9.3 Business Consultant

9.4 Organization Development Consultant

9.5 Business Process Consultant

9.6 Change Management Consultant

9.7 Needs Analysis And Research Consultant

9.8 Business Architect

9.9 Statistical Analyst

9.10 Knowledge Management Consultant

9.11 Information Records Management/
Recordkeeping Specialist

9.12 Evaluation Services Consultant

9.13 Performance Measurement Consultant

9.14 Subject Matter Expert

9.15 Facilitator Category

STREAM #10 - Project Management Services

10.1 Project Administrator

10.7 Procurement Specialist

Solicitation No. - N° de l'invitation

E60ZT-120001/D

Amd. No. - N° de la modif.

002

Buyer ID - Id de l'acheteur

009zt

Client Ref. No. - N° de réf. du client

E60ZT-120001

File No. - N° du dossier

009ztE60ZT-120001

CCC No./N° CCC - FMS No/ N° VME

10.2 Project Manager	10.8 Financial Specialist
10.3 Project Leader/Executive	10.9 Project Monitor
10.4 Project Planner	10.10 Technical Writer
10.5 Quality Assurance/Management Specialist	10.11 Communications Consultant
10.6 Risk Management Specialist	
STREAM #11 - Real Property Project Management Services	
11.1 Project Administrator for Real Property	11.5 Financial/Cost Specialist for Real Property
11.2 Project Manager for Real Property	11.6 Portfolio Planner for Real Property
11.3 Project Leader for Real Property	11.7 Claims Analyst
11.4 Project Planner for Real Property	
STREAM #12 - Technical, Engineering and Maintenance Services	
12.1 Draftsperson/Illustrator	12.9 Handwear/Knitted Footwear and Accessories Technologist
12.2 Technician	12.10 Footwear Technologist
12.3 Engineer Graduate	12.11 Pattern Design, Development, and Sizing Technologist
12.4 Professional Engineer (P.Eng)	12.12 Clothing and Personal Protection Equipment Design and Prototyping Technologist
12.5 Clothing Technologist	12.13 Badges/Insignia/Ceremonial Accoutrements Technologist
12.6 Textile Technologist	12.14 Integrated Logistics Support (ILS) Specialist
12.7 Personal Protection Equipment Technologist	12.15 Technical Clerk
12.8 Nuclear/Biological/Chemical (NBC) Personal Protection Technologist	12.16 Life Cycle Management Specialist