



**RETURN BIDS TO:
RETOURNER LES
SOUMISSIONS À:**

Bid Receiving Canada Border Services Agency /
Réception des soumissions Agence des services
frontaliers du Canada

Canada Border Services Agency
Contracting Bids Receiving
2405 St-Laurent Unit H
Ottawa, ON K1A 0L8
(613) 941-6034

Bid Receiving Unit is open from Monday to Friday
inclusively, between the hours of 07:30 and 3:30,
excluding Statutory Holidays.

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

Proposal To: Canada Border Services Agency

We hereby offer to sell to Her Majesty the Queen in
right of Canada, in accordance with the terms and
conditions set out herein, referred to herein or
attached hereto, the goods, services, and
construction listed herein and on any attached
sheets at the price(s) set out thereof.

**Proposition aux: Agence des services frontaliers
du Canada**

Nous offrons par la présente de vendre à Sa
Majesté la Reine du chef du Canada, aux conditions
énoncées ou incluses par référence dans la
présente et aux annexes ci-jointes, les biens,
services et construction énumérés ici sur toute
feuille ci-annexées, au(x) prix indiqué(s)

**Issuing Office – Bureau de
distribution**

Canada Border Services Agency /
l'Agence des services frontaliers du
Canada
Place Vanier, Tower B
355 North River Road, 17th Floor
Ottawa (Ontario) K1A 0L8

Title – Sujet EXECUTIVE SEARCH AND RECRUITMENT SERVICES	
Solicitation No. – N° de l'invitation 1000324526	Date : April 10, 2015
Client Reference No. – N° référence du client	
GETS Reference No. – N° de reference de SEAG	
File No. – N° de dossier	CCC No. / N° CCC - FMS No. / N°
Solicitation Closes – L'invitation prend fin at – à 11 :00 AM on – le Mai 20, 2015	Time Zone - Fuseau horaire Eastern Daylight Time (EDT)
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Inquiries to : - Adresser toutes questions à: CBSA-ASFC_Solicitations- Demandes de soumissions@cbsa-asfc.gc.ca	Buyer Id – Id de l'acheteur Guillaume Doré Guillaume.Dore@cbsa-asfc.gc.ca
Telephone No. – N° de téléphone : 343-291-5724	FAX No. – N° de FAX N/A
Destination – of Goods, Services, and Construction: Destination – des biens, services et construction : Canada Border Services Agency Agence des services frontaliers du Canada	

Instructions : See Herein
Instructions: Voir aux présentes

Delivery required - Livraison exigée See Herein	Delivered Offered – Livraison proposée
Vendor/firm Name and address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Facsimile No. – N° de télécopieur Telephone No. – N° de téléphone	
Name and title of person authorized to sign on behalf of Vendor/firm (type or print)- Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur (taper ou écrire en caractères d'imprimerie)	
Signature _____	Date _____



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PART 1 - GENERAL INFORMATION

1. Introduction

The bid solicitation is divided into seven parts plus attachments and annexes, as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;
- Part 3 Bid Preparation Instructions: provides bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;
- Part 5 Certifications: includes the certifications to be provided;
- Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include the Statement of Work, the Basis of Payment, the Security Requirements Checklist, the Evaluation Criteria, the Non-Disclosure Agreement, Federal Contractors Program for Employment Equity - Bid Certification, the Financial Proposal and Task Authorization Form.

2. Summary

The Canada Border Services Agency (CBSA) is in search of a private sector firm to provide executive recruitment support and advice to complement the existing internal Human Resources capacity. The firm, hereinafter referred to as the Agency of Record (AoR), would be expected to proactively conduct targeted market searches and profiling initiatives, to identify talent pools and facilitate outreach efforts within and beyond the public sector.

The focus of this undertaking is on headquarters and regional needs of the CBSA for executive or senior management resources specifically at the Vice-President, Director General, Regional Director General and possibly Director levels for expert or unique positions.

Given competition for this talent and despite ongoing efforts to develop and recruit individuals, the CBSA still has vacancy risks amongst its executive ranks. A decision was made to enhance current internal capability with additional capacity through a private sector Agency of Record (AoR) to facilitate identification of talent pools and recruitment.

"Bidders must provide the required information as detailed in article 3 of Part 2 of the bid solicitation, in order to comply with Treasury Board policies and directives on contracts awarded to former public servants."

"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), and the Agreement on Internal Trade (AIT)."

"The Federal Contractors Program (FCP) for employment equity applies to this procurement; see Part 5 - Certifications, Part 7 - Resulting Contract Clauses and the annex titled Federal Contractors Program for Employment Equity - Certification."



3. Debriefings

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within 15 working days of receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone or in person.



PART 2 - BIDDER 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 Manual(<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) 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 and accept the clauses and conditions of the resulting contract.

The 2003 (2014-09-25) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

1.1. Revision of Departmental Name

Reference to the Minister of Public Works and Government Services or to Public Works and Government Services Canada contained in any term, condition or clause of this contract shall be interpreted as a reference to the Canada Border Services Agency (CBSA), as the case may be, with the exception of the following clauses:

- a. Standard Clauses and Conditions; and
- b. Security Requirements.

1.2. In the 2003(2014-09-25) Standard Instructions - Goods or Services - Competitive Requirements, at Article 01(2014-09-25) Integrity Provision - Bid:

Delete in its entirety.

2. Submission of Bids

Bids must be submitted only to CBSA Bid Receiving Unit by the date, time and place indicated on page 1 of the bid solicitation.

Due to the nature of the bid solicitation, bids transmitted by facsimile to CBSA will not be accepted.

2.1. In the 2003(2014-09-25) Standard Instructions - Goods or Services - Competitive Requirements, at Article 05(2014-09-25) Submission of Bids, subsection 2.d.:

Delete in its entirety.

2.2. In the 2003(2014-09-25) Standard Instructions - Goods or Services - Competitive Requirements, at Article 08(2012-03-02) Transmission by Facsimile:

Delete in its entirety



3. Former Public Servant – Competitive Requirement

Contracts awarded to 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 awarded to FPS, bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required 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 with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

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 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

As per the above definitions, is the Bidder a FPS in receipt of a pension? **Yes** () **No** ()

If so, the Bidder must provide the following information, for all FPS in receipt of a pension, as applicable:

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

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with Contracting Policy Notice: 2012-2 and the Guidelines on the Proactive Disclosure of Contracts.

Work Force Adjustment Directive

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **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 adjustment 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 Applicable Taxes.

Signature: _____ **Date:** _____



PART 3 - BID PREPARATION INSTRUCTIONS

1. Bid Preparation Instructions

Canada requests that bidders provide their bid in separately bound sections as follows:

Section I: Technical Bid (3 hard copy, and 1 soft copy on a CD)

Section II: Financial Bid (1 hard copy and 1 soft copy on a CD)

Section III: Certifications (1 hard copy)

If there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid. Bidders are asked to provide one financial proposal per packet they are bidding on.

Canada requests that bidders follow the format instructions described below in the preparation of their bid:

- a) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- b) use a numbering system that corresponds to the bid solicitation.

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, bidders should:

- 1) use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and 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, duotangs or binders.

Section I: Technical Bid

In their technical bid, bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying 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.

Section II: Financial Bid

Bidders must submit their financial bid in accordance with the Annex G "Financial Proposal". The total amount of Applicable Taxes must be shown separately.

Section III: Certifications

Bidders must submit 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 bid solicitation including the technical evaluation criteria.
- b) An evaluation team composed of representatives of Canada will evaluate the bids.

1.1. Technical Evaluation

1.1.1. Mandatory Technical Criteria

Refer to Annex D.

1.1.2. Rated Technical Criteria

Refer to Annex D.

1.2. Financial Evaluation

Bidders must submit their financial bid in accordance with the Annex G "Financial Proposal".

Failure to do so will result in the bid being non-responsive and not considered further.

2. Basis of Selection - Highest Combined Rating of Technical Merit 70 % and Price 30 %

To be declared responsive, a bid must:

- a) comply with all the requirements of the bid solicitation;
- b) meet all the mandatory evaluation criteria; and
- c) obtain the minimum points required for Point Rated Technical Criteria R.1., R.2., R.3., R.4. i.e. for each 60% of the maximum points available, and overall minimum points required of 78 points i.e. 60% of the overall maximum points available.

Bids not meeting (a) or (b) or (c) will be declared non-responsive.

The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.

To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%.

To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.

For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.

Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.



The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 60/40 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$45,000 (45).

Basis of Selection - Highest Combined Rating Technical Merit (60%) and Price (40%)

		Bidder 1	Bidder 2	Bidder 3
Overall Technical Score		115/135	89/135	92/135
Bid Evaluated Price		\$55,000.00	\$50,000.00	\$45,000.00
Calculations	Technical Merit Score	$115/135 \times 60 = 51.11$	$89/135 \times 60 = 39.56$	$92/135 \times 60 = 40.89$
	Pricing Score	$45/55 \times 40 = 32.73$	$45/50 \times 40 = 36.00$	$45/45 \times 40 = 40.00$
Combined Rating		83.84	75.56	80.89
Overall Rating		1st	3rd	2nd



PART 5 - CERTIFICATIONS

Bidders must provide the required certifications and associated information to be awarded a contract.

The certifications provided by bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default in carrying out any of its obligations under the Contract, if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority may render the bid non-responsive or constitute a default under the Contract.

5.1 Certifications Precedent to Contract Award and Certification Required with the Bid

The certifications listed below should be completed and submitted with the bid but may be submitted afterwards. If any of these required certifications is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to comply with the request of the Contracting Authority and to provide the certifications within the time frame specified will render the bid non-responsive.

5.1.1 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "[FCP Limited Eligibility to Bid](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)" list (http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml) available from Employment and Social Development Canada (ESDC) - Labour's website.

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)" list at the time of contract award.

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed annex [Federal Contractors Program for Employment Equity - Certification](#), before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

5.2 Additional Certifications Precedent to Contract Award

5.2.1 Status and Availability of Resources

The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.



If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

Signature: _____ **Date:** _____

5.2.2 Education and Experience

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

Signature: _____ **Date:** _____



PART 6 – SECURITY AND INSURANCE REQUIREMENTS

Security Requirements

1. Before award of a contract, the following conditions must be met:
 - (a) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
 - (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in Part 7- Resulting Contract Clauses;
 - (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
2. Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.
3. For additional information on security requirements, bidders should refer to the Canadian Industrial Security Directorate (CISD), Industrial Security Program of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.

ADDITIONAL SECURITY REQUIREMENT:

The CBSA, will conduct its own personnel Reliability Status assessment on a Bidder (specifically the Bidder personnel), which is allowed under the Treasury Board Secretariat of Canada's (TBS) "Security and Contracting Management Standard" and the Policy on Government Security – Personnel Security Standard. Reliability Status assessment conducted by the CBSA will include a credit check.

If a Bidder (specifically the Bidder personnel) being recommended for an award, has already been screened under the TBS Policy on Government Security - Personnel Security Standard, the Bidder (specifically the Bidder personnel), will still undergo a security screening process to be conducted by the CBSA.

The credit check will be performed by an authorized security official with the CBSA's "Personnel Security Screening Section" (PSSS), which is independent of the Public Works and Government Services Canada's (PWGSC), "Industrial Security Program (ISP)".

Until the credit check and all other security screening processes required by this Request for Proposal have been completed and the Bidder (specifically the Bidder personnel) is deemed suitable by the CBSA, no contract will be awarded and the recommended Bidder (specifically the Bidder personnel) will not be permitted access to Protected / Classified information or assets, and further, will not be permitted to enter sites where such information or assets are kept.

In the event the Bidder is not deemed suitable following the security screening process required by the CBSA, the said Bidder's proposal will be deemed non-compliant and the next ranked bidder will be contacted. If only one bid was obtained and the proposed bidder does not meet the security requirement, then, the contracting officer will determine the next steps in order to ensure all requirements are met.



Insurance Requirements

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.



PART 7 - RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of any contract resulting from the bid solicitation.

1. Statement of Work

The Contractor must perform in accordance with the Statement of Work at Annex "A".

1.1. Task Authorization

The Work or a portion of the Work as describe in the Annex A – Statement of Work, that is 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.

1.1.1 Task Authorization Process

1. The *Project Authority* will provide the Contractor with a description of the task using the "Task Authorization" form specified in Annex "H".
2. The Task Authorization (TA) will contain the details of the activities to be performed, a description of the deliverables, and a schedule indicating completion dates for the major activities or submission dates for the deliverables. The TA will also include the applicable basis(bases) and methods of payment as specified in the Contract.
3. The Contractor must provide the *Project Authority*, within 5 calendar days of its receipt, the proposed total estimated cost for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract.
4. The Contractor must not commence work until a TA authorized by *Project Authority* has been received by the Contractor. The Contractor acknowledges that any work performed before a TA has been received will be done at the Contractor's own risk.

1.1.2 Task Authorization Limit

All task authorizations must be authorized by the Contracting Authority before issuance.

1.1.3 Canada's Obligation - Portion of the Work - Task Authorizations B9031C

Canada's obligation with respect to the portion of the Work under the Contract that is performed through task authorizations is limited to the total amount of the actual tasks performed by the Contractor.

2. Requirement

The Canada Border Services Agency (CBSA) is in search of a private sector firm to provide executive recruitment support and advice to complement the existing internal Human Resources capacity. The firm, hereinafter referred to as the Agency of Record (AoR), would be expected to proactively conduct targeted market searches and profiling initiatives, to identify talent pools and facilitate outreach efforts within and beyond the public sector.

The focus of this undertaking is on headquarters and regional needs of the CBSA for executive or senior management resources specifically at the Vice-President, Director General, Regional Director General and possibly Director levels for expert or unique positions.



Given competition for this talent and despite ongoing efforts to develop and recruit individuals, the CBSA still has vacancy risks amongst its executive ranks. A decision was made to enhance current internal capability with additional capacity through a private sector Agency of Record (AoR) to facilitate identification of talent pools and recruitment.

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 (2014-09-25), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

The above General Conditions are amended as follows:

At Article 2035 41(2014-09-25) Integrity Provision – Contract

Delete in its entirety

4. Security Requirement

1. The Contractor/Offeror personnel requiring access to PROTECTED information, assets or sensitive work site(s) must EACH hold a valid RELIABILITY, granted or approved by CISC/PWGSC/CBSA.
2. The Contractor/Offeror MUST NOT remove any PROTECTED information or assets from CBSA premises and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction.
3. The Contractor/Offeror must comply with the provisions of the:
 - a) Security Requirements Check List and security guide (if applicable), attached at Annex C;
 - b) Industrial Security Manual (Latest Edition).

5. Term of Contract

5.1. Period of the Contract

The period of the Contract is from the date of the Contract award to [Month Date, Year \(to be inserted at contract award\)](#), inclusive.

5.2. Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to two (2) additional twelve (12) month option period(s) under the same conditions.

The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.



Canada may exercise this option at any time by sending a written notice to the Contractor at least 15 calendar days before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

6. Authorities

6.1. Contracting Authority

The Contracting Authority for the Contract is:

Name: Guillaume Doré
Title: A/ Senior Supply/Business Analyst
Organization: Canada Border Services Agency
Address: 355 North River Road, Ottawa, ON K1A 0L8
Telephone: (343) 291-5724
E-mail address: Guillaume.Doré@cbsa-asfc.gc.ca

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. Project Authority

The Project Authority for the Contract is:

Name: _____
Title: _____
Organization: _____
Address: _____
Telephone: ___-___-_____ Facsimile: ___-___-_____
E-mail address: _____

The Project 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 Project Authority; however, the Project 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

Name: _____
Title: _____
Telephone: ___-___-_____ Facsimile: ___-___-_____
E-mail address: _____

7. Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a Public Service Superannuation Act (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada.



8. Payment

8.1. Basis of Payment

8.1.1. Basis of Payment - Firm Price

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid the all-inclusive firm price as specified in Annex B "Basis of Payment". Customs duties are included and Applicable Taxes are extra.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

8.1.2. Basis of Payment - Firm per diem rate – Task Authorizations

In consideration of the Contractor satisfactorily completing all of its obligations under the authorized Task Authorization (TA), the Contractor will be paid the firm per diem rate in accordance with the basis of payment, in Annex B as specified in the authorized TA. Customs duties are included and Applicable Taxes are extra.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been authorized, in writing, by the Contracting Authority before their incorporation into the Work.

8.2. Limitation of Expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed **\$TBD**. Customs duties are included and Applicable Taxes are extra.
2. 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 exceeded 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:
 - a. when it is 75 percent committed, or
 - b. four (4) months 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.
3. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.



8.3. Terms of Payment – Single or Monthly Payment

Canada will pay the Contractor upon completion and delivery of the Work or 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;
- c) the Work performed has been accepted by Canada.

9. Invoicing Instructions

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 for each Contractor personnel assigned to the contract, or a combination of summary time sheets that articulate the name and hours worked of each Contractor personnel, to support the time claimed;
 - b. a copy of the release document and any other documents as specified in the Contract;
 - 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.
2. Invoices must be distributed as follows:
 - a. The electronic original must be forwarded to the following address for certification and payment.

By email: vendors-fournisseurs@cbsa-asfc.gc.ca

- b. One (1) electronic copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

10. Certifications

10.1. Compliance

The continuous compliance with the certifications provided by the Contractor in its bid and the ongoing cooperation in providing associated information are conditions of the Contract. Certifications are subject to verification by Canada during the entire period of the Contract. If the Contractor does not comply with any certification, fails to provide the associated information, or if it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.



10.2. Federal Contractors Program for Employment Equity - Default by the Contractor

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC)-Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the "FCP Limited Eligibility to Bid" list. The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

11. Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

12. 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 Agreement;
- b) the general conditions 2035 (2014-09-25), General Conditions - Higher Complexity - Services;
- c) Annex A, Statement of Work;
- d) Annex B, Basis of Payment;
- e) Annex C, Security Requirements Check List;
- f) Annex E, Non-Disclosure Agreement;
- g) Annex F, Federal Contractors Program for Employment Equity - Bid Certification
- h) The signed Task Authorizations (including all of its annexes, if any);
- i) the Contractor's bid dated _____, (*insert date of bid*)

13. Foreign Nationals (Canadian Contractor)

The Contractor must comply with Canadian immigration requirements applicable to foreign nationals entering Canada to work temporarily in fulfillment of the Contract. If the Contractor wishes to hire a foreign national to work in Canada to fulfill the Contract, the Contractor should immediately contact the nearest Service Canada regional office to enquire about Citizenship and Immigration Canada's requirements to issue a temporary work permit to a foreign national. The Contractor is responsible for all costs incurred as a result of non-compliance with immigration requirements.

14. Insurance

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. Government Site Regulations

The Contractor must comply with all regulations, instructions and directives in force on the site where the Work is performed.

16. Non-disclosure Agreement

The Contractor must obtain from its employee(s) or subcontractor(s) the completed and signed non-disclosure agreement, attached at Annex E, and provide it to the Project Authority before they are given access to information by or on behalf of Canada in connection with the Work.



ANNEX A STATEMENT OF WORK

1. BACKGROUND:

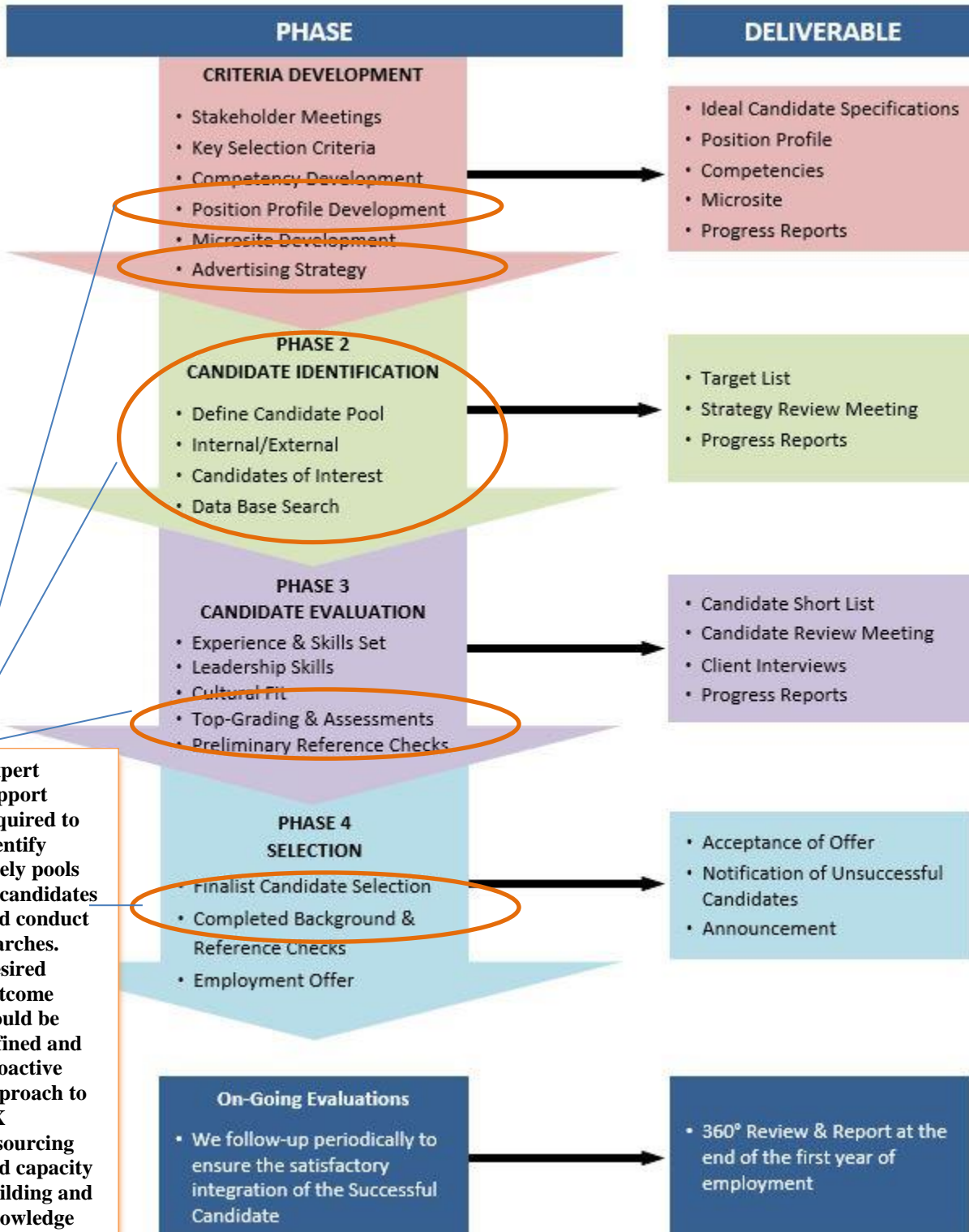
The Canada Border Services Agency (CBSA) is in search of a private sector firm to provide executive recruitment support and advice to complement the existing internal Human Resources capacity. The firm, hereinafter referred to as the Agency of Record (AoR), would be expected to proactively conduct targeted market searches and profiling initiatives, to identify talent pools and facilitate outreach efforts within and beyond the public sector.

The focus of this undertaking is on headquarters and regional needs of the CBSA for executive or senior management resources specifically at the Vice-President, Director General, Regional Director General and possibly Director levels for expert or unique positions.

Given competition for this talent and despite ongoing efforts to develop and recruit individuals, the CBSA still has vacancy risks amongst its executive ranks. A decision was made to enhance current internal capability with additional capacity through a private sector Agency of Record (AoR) to facilitate identification of talent pools and recruitment.

2. OBJECTIVE AND OVERVIEW:

The main objective of this undertaking is to seek the services of an established private sector firm to conduct executive searches for a variety of positions within the Agency. The AoR would have an extensive national network and significant contacts related to the expertise required by the CBSA. An overview of the phases in which the firm could be expected to support along with expected deliverables are depicted in the following - Overview –Executive Search Process:



Expert support required to identify likely pools of candidates and conduct searches. Desired outcome would be refined and proactive approach to EX resourcing and capacity building and knowledge transfer for EGS/HR.



3. SCOPE OF WORK

As headquarters or regional senior positions become vacant, a task authorization request would be issued by the CBSA to the AoR.

Both the CBSA and AoR would define and agree on objectives and strategies for each task authorization and at that time, the CBSA would seek a formal proposal detailing the AoR's approach and methodology along with the anticipated level of effort and timelines.

To this end, during the period of the agreement, the AoR may be called upon to provide any or all of the services within the following Phases:

- PHASE I: Planning and scoping;**
- PHASE II: Comprehensive Search;**
- PHASE III: Advertising – Promotion;**
- PHASE IV: Identification – Screening – Assessment;**
- PHASE V: Selection – Interviews – Reference Checks;**
- PHASE VI: Candidate Pool.**

4. SERVICES REQUIRED

Professional executive search and recruitment services to find successful candidates for Executive position at CBSA.

The estimated level of effort for the amount of searches required per year is estimated anywhere between 5 and 20 searches.

The CBSA will have the option to receive the Service in two different Stream:

STREAM 1: The Contractor will provide the service from PHASE I to PHASE VII

The estimated level of effort for one executive search under the STREAM 1 is estimated to be anywhere between 6 to 12 weeks from the Task Authorization start date to the signing of the letter of offer by the successful candidates.

STREAM 2: The Contractor will provide the service of the selected phases (1 to 6) which will be indicated in the Task Authorization (TA) by the Agency Representative.

The estimated level of effort under the STREAM 2 will be indicated in the Task Authorization.

5. TASKS AND DELIVERABLES

Tasks and Deliverables include, but are not limited to:

5.1. PHASE I: Planning and Scoping

- Develop an in-depth understanding of the context and requirements education, experience, knowledge and competencies that are essential or desired related to the position to be staffed; and work with the Agency Representative to update and finalize the selection criteria for the position;
- Present to Agency Representative a detailed work plan including a list of activities the AoR will carry out, a schedule of events and the names and credentials of individuals assigned to the task



authorization. Provide an estimate of the work plan and critical path along with methodology that can be used for the particular search and recruitment process;

- Provide to Agency Representative with a list of target markets, regions, associations and individuals deemed suitable for consideration and to be contacted to determine interest and potential fit; and
- Present an initial progress report to the Agency Representative within two (2) to four (4) weeks (to be determined by the Agency Representative) in order to confirm that the search process is developing according to expectations and work plan, and to assessed opportunities within targeted regions, companies, associations, employment equity groups and/or individuals.

5.2. PHASE II: **Comprehensive Searches**

- Research, complete and document systematic and comprehensive searches of target markets, profiles, regions, companies, associations and individuals and present findings to the Agency Representative;
- Reconfirm with the Agency Representative or his/her representative thereafter, verbally or in writing on a bi-weekly or more frequent basis (as determined by the Project Authority) that the process steps are unfolding as planned and if need be, to redefine the selection process direction; and
- Provide lists of potential candidates to the Agency Representative.

5.3. PHASE III: **Advertising – Promotion**

- Develop for consideration and approval, advertising / promotional campaigns, including ads in newspapers, professional association journals or selected publications and electronic job advertising sites; and
- Undertake, upon approval by the Agency Representative, publications in the selected media.

5.4. PHASE IV: **Identification – Screening – Assessment**

- Screen applications received from the advertising / promotional campaigns;
- Provide a long-list comprised of names of individuals targeted and individuals who responded to the advertising / publicity campaigns;
- Provide resumes of all potential candidates;
- Analyze and discuss the long-list of potential candidates with the Agency Representative, offering expert advice and council so that the best prospective executive candidates are considered;
- Using a pre-defined position profile/Statement of Merit Criteria, meet with candidates to determine level of interest and provide preliminary assessments; and
- Finalize a short-list (ideal is around 5 candidates) based on discussions with the Agency Representative.

5.5. PHASE VI: **Selection – Interviews – Reference Checks**

- Prepare any reference material packages for potential candidates (e.g. regarding the organization or the position) including reference material, position profile/Statement of Merit Criteria and resumes for selection committee members in preparation for interviews or meetings;



- In consultation with the Agency Representative, oversee the logistics and coordination of interviews;
- Participate in selection boards as called for by the Agency Representative;
- In consultation with the Agency Representative and using the pre-defined guide, conduct reference checks based on the established criteria. Confirm through these interviews, base data such as education, employment dates, positions held, and any insight on exit interviews previous employers might be willing to share; and
- Present a preliminary assessment of the candidates based on the acquired intelligence from the references.

5.6. PHASE VII: Candidate Pool

- Develop and present to the Agency Representative a short list of candidates deemed qualified for more generic positions or for specialized shortage areas; and
- Provide the Project Authority with a final report of the search process, outlining the recruitment strategy, posters, number of individuals contacted, number of applicants and referrals, and other information relevant to the search process.

6. LOCATION OF WORK

Although most of the work will be on the AoR's premises, there may be occasions where CBSA on-site work could be more appropriate.

7. CLIENT SUPPORT

The Agency Representative undertakes to make documentation, boardroom facilities and/or workstations available to the AoR. Access to internal data applications will not be required for this undertaking. Seeing that on-site work will only be occasional, no permanent access security cards will be provided.

8. ACCOUNT MANAGER

The Contractor agrees to identify and mandate an internal Account Manager (AM) to this undertaking. The AM's primary role is to represent the AoR and to ensure efficient and effective services. This individual will be fluent in French and English and will serve as the key point of contact throughout the executive searches assigned by task authorization.

9. DELIVERABLES

Task authorizations may include any or all of the following deliverables. As per Article 3 Scope of Work above, deliverables will be in line with the role played by the AoR for the specific task authorization. The deliverables could include the provision of:

- A list of target markets, regions, companies, associations and individuals deemed suitable for consideration and to be contacted to determine interest and suitability;
- Detailed work plans that include a list of activities, with milestone dates, the names and CVs assigned to the specific task;
- Assessment and screening tools and methodology to be used in the search and recruitment processes;
- Advertising and/or publicity campaigns in newspapers, professional association journals or selected publications and electronic job advertising sites;
- Long- and short-listed candidates who meet the requirements as described in the search criteria/position profile (Statement of Merit Criteria);
- References reports and assessments;



- Written status reports; and
- Lessons learned reports from mandated and completed searches.

Any and all reports must be submitted in the agreed to language for the specific task. Draft and final reports must be compatible with a MS Windows environment.

10. CANDIDATES HANDS-OFF POLICY

The Contractor must maintain a two-year "candidate hands-off" policy. This means that the Contractor cannot approach candidates appointed to the position, for other employment and opportunities for a twenty-four month period after the effective date of the appointment to the position.

11. GUARANTEE NON-PERFORMANCE

If a recruited candidate does not accept nomination to the position, resigns within twelve (12) months of the effective date of the appointment to the position, or is terminated for cause within twelve (12) months of the effective date of the appointment to the position, the Contractor must provide one or more alternate candidates at no additional cost.

12. CONFIDENTIALITY

The AoR must respect the privileged relationship it has with the CBSA and be committed to strict confidentiality, both by professional ethics and common sense, to protect against unnecessary apprehension.

13. DURATION OF AGREEMENT

The agreement will be effective upon award and be in force for an initial period of twenty four (24) months with an additional optional year to be exercised at the sole discretion of the CBSA.

14. CONSTRAINTS AND SPECIFICATIONS

- The Contractor's resources may be required to work on-site at the offices of the CBSA located in the National Capital Region.
- Any Contractor resource assigned to this contract must have a Reliability Security Clearance.

15. LANGUAGE REQUIREMENT

The Contractor is required to provide services both to Government and to potential candidates in both Official Languages.

16. TRAVEL AND LIVING EXPENSES

All travel and living expenses are at the Contractor's expenses.



**ANNEX B
BASIS OF PAYMENT**

STREAM 1 – PERCENTAGE OF BASE SALARY

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid the all-inclusive firm price. Customs duties are included and Applicable Taxes are extra.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

Contract Year (12 months) – TBD, 2015 to TBD, 2016

	EX-01 (\$124,300)*	EX-02 (\$139,300)*	EX-03 (\$155,900)*	EX-04 (\$178,800)*	EX-05 (\$200,300)*	Total
FEE (%)	%	%	%	%	%	
COST (\$)	\$	\$	\$	\$	\$	
Sub-Total						\$
GST/HST						\$
TOTAL						\$

*The salary indicated in the table is the maximum salary rate of the required position.
http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/ratesofpay/rapaceexunem02-eng.asp

Option Period Year 1 (12 months) – TBD, 2016 to TBD, 2017

	EX-01 (\$124,300)*	EX-02 (\$139,300)*	EX-03 (\$155,900)*	EX-04 (\$178,800)*	EX-05 (\$200,300)*	Total
FEE (%)	%	%	%	%	%	
COST (\$)	\$	\$	\$	\$	\$	
Sub-Total						\$
GST/HST						\$
TOTAL						\$

*The salary indicated in the table is the maximum salary rate of the required position.
http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/ratesofpay/rapaceexunem02-eng.asp



Option Period Year 2 (12 months) - TBD, 2017 to TBD, 2018

	EX-01 (\$124,300)*	EX-02 (\$139,300)*	EX-03 (\$155,900)*	EX-04 (\$178,800)*	EX-05 (\$200,300)*	Total
FEE (%)	%	%	%	%	%	
COST (\$)	\$	\$	\$	\$	\$	
Sub-Total						\$
GST/HST						\$
TOTAL						\$

*The salary indicated in the table is the maximum salary rate of the required position.
http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/ratesofpay/rapaceexunem02-eng.asp

Terms of Payment

Canada will pay the Contractor upon completion and delivery of the work in accordance with the Basis of 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 delivered has been accepted by Canada.



STREAM 2 – COST PER DIEM

In consideration of the Contractor satisfactorily completing all of its obligations under the authorized Task Authorization (TA), the Contractor will be paid the firm per diem rate. Customs duties are included and Applicable Taxes are extra.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been authorized, in writing, by the Contracting Authority before their incorporation into the Work.

Contract Year (12 months) – TBD, 2015 to TBD, 2016

	EX-01 – EX-02 (\$139,300)*	EX-03 (\$155,900)*	EX-04 – EX-05 (\$200,300)*	Total
RATE	\$	\$	\$	
Sub-Total				\$
HST				\$
TOTAL				\$

*The salary indicated in the table is the maximum salary rate of the required position.
http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/ratesofpay/rapaceexunem02-eng.asp

Option Period Year 1 (12 months) – TBD, 2016 to TBD, 2017

	EX-01 – EX-02 (\$139,300)*	EX-03 (\$155,900)*	EX-04 – EX-05 (\$200,300)*	Total
RATE	\$	\$	\$	
Sub-Total				\$
HST				\$
TOTAL				\$

*The salary indicated in the table is the maximum salary rate of the required position.
http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/ratesofpay/rapaceexunem02-eng.asp

Option Period Year 2 (12 months) - TBD, 2017 to TBD, 2018

	EX-01 – EX-02 (\$139,300)*	EX-03 (\$155,900)*	EX-04 – EX-05 (\$200,300)*	Total
RATE	\$	\$	\$	
Sub-Total				\$
HST				\$
TOTAL				\$

*The salary indicated in the table is the maximum salary rate of the required position.
http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/ratesofpay/rapaceexunem02-eng.asp



Terms of 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.

All payments are subject to government audit.



ANNEX C SECURITY REQUIREMENTS CHECK LIST

Government of Canada / Gouvernement du Canada

RECEIVED

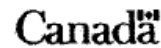
FEB 06 2015

Contract Number / Numéro du contrat
Security Classification / Classification de sécurité

SECURITY REQUIREMENTS CHECK LIST (SRCL) / LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

Form with multiple sections: 1. Originating Government Department or Organization (Canada Border Services Agency), 2. Branch or Directorate (Human Resources), 3. Subcontract information, 4. Brief Description of Work (Executive Search and Recruitment Services), 5. Access to Controlled Goods, 6. Access to technical data, 7. Information access requirements, 7.b. Release restrictions, 7.c. Level of information (classification levels).

Security Classification / Classification de sécurité





Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat
Security Classification / Classification de sécurité

PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS?
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?
Short Title(s) of material / Titre(s) abrégé(s) du matériel :
Document Number / Numéro du document :

PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis
RELIABILITY STATUS COTE DE FIABILITÉ
CONFIDENTIAL CONFIDENTIEL
SECRET SECRET
TOP SECRET TRÈS SECRET
TOP SECRET - SIGINT TRÈS SECRET - SIGINT
NATO CONFIDENTIAL NATO CONFIDENTIEL
NATO SECRET NATO SECRET
COSMIC TOP SECRET COSMIC TRÈS SECRET
SITE ACCESS ACCÈS AUX EMPLACEMENTS
Special comments: Commentaires spéciaux :
NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.
REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail?
If Yes, will unscreened personnel be escorted:
Dans l'affirmative, le personnel en question sera-t-il escorté?

PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?
Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS?
11. b) Will the supplier be required to safeguard COMSEC information or assets?
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC?

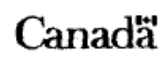
PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?
Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?

INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS?
11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale?

Security Classification / Classification de sécurité





Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat
Security Classification / Classification de sécurité

PART C (continued) / PARTIE C (suite)

For users completing the form manually use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.

For users completing the form online (via the Internet), the summary chart is automatically populated by your responses to previous questions.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category / Catégorie	PROTECTED / PROTÉGÉ			CLASSIFIED / CLASSIFIÉ			NATO				COMSEC						
	A	B	C	Confidential / Confidentiel	Secret	Top Secret / Très Secret	NATO Restricted / NATO Diffusion Restreinte	NATO Confidential / NATO Confidentiel	NATO Secret	COSMIC Top Secret / COSMIC Très Secret	Protected / Protégé			Confidential / Confidentiel	Secret	Top Secret / Très Secret	
											A	B	C				
Information / Assets / Renseignements / Biens	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Production	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT Media / Support TI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT Link / Lien électronique	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED? / La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? [X] No / Non [] Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification". / Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée "Classification de sécurité".

12. b) Will the document attached to this SRCL be PROTECTED and/or CLASSIFIED? / La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE? [X] No / Non [] Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments). / Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée "Classification de sécurité" au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

Security Classification / Classification de sécurité
--





**ANNEX D
EVALUATION CRITERIA**

Evaluation Disclaimer

The Technical Evaluation of the proposals will be performed in two (2) phases as follows:

Evaluation Phase 1: Mandatory Technical Criteria

The mandatory criteria will be evaluated on a "Met/Not Met" (i.e. compliant/non-compliant) basis. Proposals must demonstrate compliance with the mandatory requirement and must provide the necessary documentation to support a determination of compliance. Proposals that fail to meet the mandatory requirements will be deemed non-compliant and will be given no further consideration.

Evaluation Phase 2: Point Rated Technical Criteria

The bidder must obtain the required minimum number of points specified (60%) for the point rated technical criteria.

#	Point Rated Technical Criterion	Maximum Number of Points	Required Minimum Number of Points	Percent
R.1.	Experience and expertise of the firm	55	33	60
R.2.	Technical Approach	33	21	60
R.3.	Project Plan	15	9	60
R.4.	Oral Presentation	25	15	60

Overall Minimum Percent Required	60
Overall Maximum Points Available	128
Overall Minimum Points Required	78

Merely stating the experience is not sufficient and the proposal will be deemed non-compliant.

Example: If the evaluation criteria demands experience in gathering, analyzing and validating findings, it is not sufficient just to state the resource has experience gathering, analyzing and validating findings. The experience **must** be demonstrated **and** a reference made to the specific location in the resume where corroborating information can be located in the manner indicated above.

Bidders are advised that only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirements will not be considered "demonstrated" for the purpose of this evaluation. The bidder should provide complete details as to where, when (month and year) and how (through which activities/responsibilities) the stated qualifications/experience were obtained.

The Contracting Authority reserves the right to request reference(s)* from any of the listed projects to verify and validate the information stated in the proposal. If the reference is unable to verify or validate the information stated in the proposal, the rating will be adjusted accordingly.



The proposal documentation must include detailed Curriculum Vitae (Resume) of the proposed candidate as part of the technical bid. Bidders are to indicate the location in your proposal where the requested information can be found for the evaluation criteria.

***Reference: A reference to verify work performed MUST be an authority on the project in the capacity of an employee. It cannot be from a colleague or a subordinate.**

Mandatory Technical Criteria

Evaluation Phase 1: Mandatory Technical Criteria

The mandatory criteria will be evaluated on a "Met/Not Met" (i.e. compliant/non-compliant) basis. Proposals must demonstrate compliance with the following Mandatory requirement and must provide the necessary documentation to support a determination of compliance. Proposals that fail to meet the mandatory requirement will be deemed non-responsive and given no further consideration.

Point Rated Technical Criteria

Evaluation Phase 2: Point Rated Technical Criteria

Bids which meet all the mandatory technical criteria will be evaluated and scored as specified in the tables inserted below.

Bids which fail to obtain the required minimum number of points specified (60%) will be declared non-responsive.



EVALUATION PHASE 1 - MANDATORY TECHNICAL CRITERIA

Criterion Reference	Mandatory Criteria	Cross reference to proposal
<p>M.1. Experience and expertise of the firm</p> <p>Bidders are advised that the evaluation team will look for the following details in the demonstrated engagements when evaluating responses to Criterion M.1.2.:</p> <ul style="list-style-type: none"> • Engagement description and deliverables; • Engagement start and end date; • The role and responsibilities of the firm; and • The client organization including the name of the authorized client representative for whom the work was directly performed along with current telephone number. Client Contacts provided for referenced engagements may be contacted by CBSA to validate the information provided by bidders. <p>For the purposes of this RFP, an engagement is defined as one position. One search assignment or project undertaken by the bidder may have targeted several engagements or several positions.</p>		
M.1.1.	The Bidder must have a minimum of ten (10) years' experience identifying and assessing candidates for executive positions.	
M.1.2.	The Bidder must demonstrate that it has successfully completed a minimum of thirty (30) senior executive search engagements in the past five (5) years of which fifteen (15) were for public sector positions.	
M.1.3.	The bidder must demonstrate that it is a member in good standing of the <i>Association of Executive Search Consultants</i> .	



Criterion Reference	Mandatory Criteria	Cross reference to proposal
<p>M.2. Experience and expertise of the proposed Project Manager</p> <p>Bidders are advised that the evaluation team will look for the following details in the demonstrated engagements when evaluating responses to Criterion M.2.1:</p> <ul style="list-style-type: none">• Engagement description and deliverables;• Engagement start and end date;• The role and responsibilities of the firm; and• The client organization including the name of the authorized client representative for whom the work was directly performed along with current telephone number. Client contacts provided for referenced engagements may be contacted by CBSA to validate the information provided by bidders.		
M.2.1.	The Bidder must demonstrate that the proposed Project Manager has successfully completed fifteen (15) engagements within the last five (5) years involving the identification and assessment of candidates for governance or oversight groups such as boards of directors or advisory committees.	



EVALUATION PHASE 2 – POINT-RATED TECHNICAL CRITERIA

Criterion Reference	Point-Rated Criteria	Maximum Points	Weighting (Points)	Cross Reference to Proposal												
<p>R.1. Experience and expertise of the firm</p> <p>The bidder must obtain a minimum pass mark of 33 points out of a maximum of 55 points for R.1. in order to be considered responsive.</p> <p>Bidders are advised that the evaluation team will look for the following details in the demonstrated engagements when evaluating responses to Criteria R.1.1 to R.1.3.</p> <ul style="list-style-type: none"> Engagement description and deliverables; Engagement start and end date; The role and responsibilities of the firm; and The client organization including the name of the authorized client representative for whom the work was directly performed along with current telephone number. Client Contacts provided for Referenced Engagements may be contacted by the CBSA to validate the information provided by Bidders. 																
<p>R.1.1.</p>	<p>The Bidder should demonstrate that it has successfully conducted similar engagements over the past three (3) years.</p> <p>Note: Similar engagements are defined as executive search engagements involving the identification and assessment of candidates for governance or oversight groups such as boards of directors or advisory committees.</p>	<p>15 points</p>	<table border="1"> <thead> <tr> <th data-bbox="848 935 1150 1027">Number of Points engagements / projects</th> <th data-bbox="1150 935 1434 1027">Points</th> </tr> </thead> <tbody> <tr> <td data-bbox="848 1027 1150 1060">40 or more</td> <td data-bbox="1150 1027 1434 1060">15 pts</td> </tr> <tr> <td data-bbox="848 1060 1150 1092">30 to 39</td> <td data-bbox="1150 1060 1434 1092">12 pts</td> </tr> <tr> <td data-bbox="848 1092 1150 1125">20 to 29</td> <td data-bbox="1150 1092 1434 1125">9 pts</td> </tr> <tr> <td data-bbox="848 1125 1150 1157">10 to 19</td> <td data-bbox="1150 1125 1434 1157">6 pts</td> </tr> <tr> <td data-bbox="848 1157 1150 1190">Less than 10</td> <td data-bbox="1150 1157 1434 1190">3 pts</td> </tr> </tbody> </table>	Number of Points engagements / projects	Points	40 or more	15 pts	30 to 39	12 pts	20 to 29	9 pts	10 to 19	6 pts	Less than 10	3 pts	
Number of Points engagements / projects	Points															
40 or more	15 pts															
30 to 39	12 pts															
20 to 29	9 pts															
10 to 19	6 pts															
Less than 10	3 pts															



Criterion Reference	Point-Rated Criteria	Maximum Points	Weighting (Points)	Cross Reference to Proposal
The following rating scheme will be used to assess the criteria R.1.2. and R.1.3.				
Rating	Description			
20 points	Outstanding response, the rated criterion is dealt with in depth; information provided demonstrates a full range of in-depth experience relevant to all of the elements of the rated criteria requirements.			
15 points	Response to the rated criteria is well addressed; information provided clearly demonstrates a full range of experience that is relevant to all of the elements of the rated criteria, information only missing some minor areas.			
10 points	Response to the rated criteria is satisfactorily addressed, the information provided demonstrates experience that is relevant to all of the elements of the rated criteria, information missing many points including some major areas.			
5 points	Unsatisfactory response, information provided demonstrates a lack of experience in most elements of the rated criteria, information missing many major areas.			
0 point	Unsatisfactory response, information provided does not demonstrate experience relevant to the rated criteria.			
R.1.2.	The Bidder should demonstrate it experience in assembling a complete team of qualified executive recruiters and researchers.	20 points		
R.1.3.	The Bidder should demonstrate the extensiveness of its information sources and network of contacts.	20 points		



Criterion Reference	Point-Rated Criteria	Maximum Points	Weighting (Points)	Cross Reference to Proposal												
<p>R.2. Technical Approach</p> <p>The bidder must obtain a minimum pass mark of 21 points out of a maximum of 35 points for R.2. in order to be considered responsive. Bidders are also advised that a pass mark is required for some criteria. Bidders that do not achieve the pass mark of any criterion where such a pass mark has been identified will be considered non-responsive.</p>																
<p>R.2.1.</p>	<p>Overall approach and methodology</p> <p>The bidder should describe its approach and methodology and provide sufficient detail to allow for a complete and full understanding of how tasks/activities will be carried out to meet all requirements of the scope of work.</p> <p>The proposal should outline the approach to be followed in completing all aspects of the scope of work, including the search strategy, the approach to matching potential candidates to the competency profile and the strategy for identifying candidates who collectively possess the appropriate blend of knowledge, expertise and experience required by individual government institutions.</p> <p>Any creative ideas or innovations regarding the requested services and which add to the value, usefulness and cost effectiveness of the proposal should also be presented.</p>	<p>20 points</p>	<table border="1"> <thead> <tr> <th data-bbox="1083 607 1392 638">Description</th> <th data-bbox="1392 607 1524 638">Rating</th> </tr> </thead> <tbody> <tr> <td data-bbox="1083 638 1392 721">Rigorous approach and methodology that meets all of the areas.</td> <td data-bbox="1392 638 1524 721">20</td> </tr> <tr> <td data-bbox="1083 721 1392 833">Good approach and methodology; only missing some minor areas.</td> <td data-bbox="1392 721 1524 833">15</td> </tr> <tr> <td data-bbox="1083 833 1392 915">Adequate approach and methodology; missing some major areas.</td> <td data-bbox="1392 833 1524 915">10</td> </tr> <tr> <td data-bbox="1083 915 1392 1027">Approach and methodology is weak; missing most major areas.</td> <td data-bbox="1392 915 1524 1027">5</td> </tr> <tr> <td data-bbox="1083 1027 1392 1140">Proposal fails to demonstrate any approach and methodology.</td> <td data-bbox="1392 1027 1524 1140">0</td> </tr> </tbody> </table>	Description	Rating	Rigorous approach and methodology that meets all of the areas.	20	Good approach and methodology; only missing some minor areas.	15	Adequate approach and methodology; missing some major areas.	10	Approach and methodology is weak; missing most major areas.	5	Proposal fails to demonstrate any approach and methodology.	0	
Description	Rating															
Rigorous approach and methodology that meets all of the areas.	20															
Good approach and methodology; only missing some minor areas.	15															
Adequate approach and methodology; missing some major areas.	10															
Approach and methodology is weak; missing most major areas.	5															
Proposal fails to demonstrate any approach and methodology.	0															



<p>R.2.2.</p>	<p>Understanding of the requirement</p> <p>The Bidder should demonstrate it has a complete understanding of the requirements in Annex A – Statement of Work.</p> <p>In order to demonstrate the Bidder complete understanding of Annex A – Statement of Work, the Supplier’s technical arrangement should provide the detail and description necessary to demonstrate:</p> <ul style="list-style-type: none"> - That the Supplier understands the CBSA’s for executive or senior management resources needs. 	<p>15 points</p>	<table border="1"> <thead> <tr> <th>Description</th> <th>Rating</th> </tr> </thead> <tbody> <tr> <td>Demonstrated complete and full understanding of the requirement; clear recognition of all the key elements.</td> <td>20</td> </tr> <tr> <td>Very good understanding overall; good fair understanding in most of some minor areas; recognition of most key elements and problems.</td> <td>15</td> </tr> <tr> <td>Overall fair understanding; missing many points in some minor including major areas; average limited appreciation of key elements and problems.</td> <td>10</td> </tr> <tr> <td>Weak or superficial understanding, missing many major areas; weak understanding of key elements and problems.</td> <td>5</td> </tr> <tr> <td>No demonstrated understanding of the requirement.</td> <td>0</td> </tr> </tbody> </table>	Description	Rating	Demonstrated complete and full understanding of the requirement; clear recognition of all the key elements.	20	Very good understanding overall; good fair understanding in most of some minor areas; recognition of most key elements and problems.	15	Overall fair understanding; missing many points in some minor including major areas; average limited appreciation of key elements and problems.	10	Weak or superficial understanding, missing many major areas; weak understanding of key elements and problems.	5	No demonstrated understanding of the requirement.	0	
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Weak or superficial understanding, missing many major areas; weak understanding of key elements and problems.	5															
No demonstrated understanding of the requirement.	0															



Criterion Reference	Point-Rated Criteria	Maximum Points	Weighting (Points)	Cross Reference to Proposal												
<p>R.3. Project Plan</p> <p>The bidder must obtain a minimum pass mark of 9 points out of a maximum of 15 points for R.3. in order to be considered responsive.</p>																
<p>R.3.1.</p>	<p>The Bidder should provide a project plan showing rigorous project management methodology and using generally accepted project management tools and techniques, i.e. initiation, planning, execution, monitoring and controlling, and closing, and use of automated project management tools such as MS Project to manage project scope, quality, time, and cost.</p> <p>The following areas will be taken under consideration:</p> <ul style="list-style-type: none"> - Comprehensiveness, clarity of the project plan, schedule, level of effort, and relevance. 	<p>15 points</p>	<table border="1"> <thead> <tr> <th data-bbox="1083 492 1392 524">Description</th> <th data-bbox="1392 492 1524 524">Rating</th> </tr> </thead> <tbody> <tr> <td data-bbox="1083 524 1392 906">Comprehensive, complete, very clear project plan, comprehensive scheduling with consideration to avoid delays, level of resources is adequate and of the right skill set and level to accomplish the task, interdependencies are clearly articulated and appropriate, critical path is obvious.</td> <td data-bbox="1392 524 1524 906" style="text-align: center;">15</td> </tr> <tr> <td data-bbox="1083 906 1392 992">Very good work plan missing only some minor areas.</td> <td data-bbox="1392 906 1524 992" style="text-align: center;">12</td> </tr> <tr> <td data-bbox="1083 992 1392 1130">Average Fair project plan, lacking on a number of lot of minor areas and at least one major deficiency.</td> <td data-bbox="1392 992 1524 1130" style="text-align: center;">9</td> </tr> <tr> <td data-bbox="1083 1130 1392 1216">Weak project plan with deficiencies in most areas.</td> <td data-bbox="1392 1130 1524 1216" style="text-align: center;">3</td> </tr> <tr> <td data-bbox="1083 1216 1392 1302">No demonstrated project plan included in the proposal.</td> <td data-bbox="1392 1216 1524 1302" style="text-align: center;">0</td> </tr> </tbody> </table>	Description	Rating	Comprehensive, complete, very clear project plan, comprehensive scheduling with consideration to avoid delays, level of resources is adequate and of the right skill set and level to accomplish the task, interdependencies are clearly articulated and appropriate, critical path is obvious.	15	Very good work plan missing only some minor areas.	12	Average Fair project plan, lacking on a number of lot of minor areas and at least one major deficiency.	9	Weak project plan with deficiencies in most areas.	3	No demonstrated project plan included in the proposal.	0	
Description	Rating															
Comprehensive, complete, very clear project plan, comprehensive scheduling with consideration to avoid delays, level of resources is adequate and of the right skill set and level to accomplish the task, interdependencies are clearly articulated and appropriate, critical path is obvious.	15															
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Weak project plan with deficiencies in most areas.	3															
No demonstrated project plan included in the proposal.	0															



Criterion Reference	Point-Rated Criteria	Maximum Points	Weighting (Points)	Cross Reference to Proposal
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R.4. Oral Presentation

The bidder must obtain a minimum pass mark of 15 points out of a maximum of 25 points for R.4. in order to be considered responsive.

The following rating scheme will be used to assess the criteria **R.4.1.**

Description	Rating
Excellent oral presentation, highly relevant detailed information is provided which clearly corroborates that the Bidder has a clear and comprehensive 's understanding of the requirement and is proposing an innovative approach and methodology to address the unique nature of the requirement and the challenges associated with the work;	15
Good oral presentation, relevant information which demonstrates that provided that demonstrates partially the Bidder's has a good understanding of the requirement and is proposing a sound approach and methodology to address the unique nature of the requirement and the challenges associated with the work;	10
Adequate oral presentation, sufficient information which demonstrates that the bidder has a general understanding of the requirement and is proposing an acceptable approach and methodology to address the unique nature of the requirement and the challenges associated with the work;	5
Little or no relevant details presented, the Bidder fails to demonstrate its understanding of the requirement or demonstrates only a superficial understanding of the requirement, and its proposed approach and methodology does not address the unique nature of the requirement and the challenges associated with the work the relevance of its approach and methodology to this requirement.	0

The following rating scheme will be used to assess the criteria **R.4.2.**

Description	Rating
Demonstrated excellent effective communications skills, ideas are expressed in a very clear and concise manner and are clearly understood;	10
Demonstrated good communications skills in general, ideas are well-clearly expressed, message is understood and few but little clarifications required;	5
Poor quality of communication, problems expressing ideas, ideas not clearly understood, problems expressing ideas and many clarifications required.	0



R.4.1.	The bidder's proposed Project Manager will be requested to make a presentation outlining the firm's overall approach to completing the work, including its search strategy, approach to matching potential candidates to the competency profile, and strategy for identifying candidates who collectively possess the appropriate blend of knowledge, expertise and experience required by individual government institutions.	15 points		
R.4.2.	During the course of the oral presentation, the proposed Project Manager will be evaluated for her/his ability to effectively communicate verbally.	10 points		



**ANNEX E
NON-DISCLOSURE AGREEMENT**

I, _____, recognize that in the course of my work as an employee or subcontractor of _____, I may be given access to information by or on behalf of Canada in connection with the Work, pursuant to Contract Serial No. _____ between Her Majesty the Queen in right of Canada, represented by the Minister of Public Works and Government Services and _____, including any information that is confidential or proprietary to third parties, and information conceived, developed or produced by the Contractor as part of the Work. For the purposes of this agreement, information includes but not limited to: any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form, recorded electronically, or otherwise and whether or not labeled as proprietary or sensitive, that is disclosed to a person or that a person becomes aware of during the performance of the Contract.

I agree that I will not reproduce copy, use, divulge, release or disclose, in whole or in part, in whatever way or form any information described above to any person other than a person employed by Canada on a need to know basis. I undertake to safeguard the same and take all necessary and appropriate measures, including those set out in any written or oral instructions issued by Canada, to prevent the disclosure of or access to such information in contravention of this agreement.

I also acknowledge that any information provided to the Contractor by or on behalf of Canada must be used solely for the purpose of the Contract and must remain the property of Canada or a third party, as the case may be.

I agree that the obligation of this agreement will survive the completion of the **Contract Serial No.:**

Signature: _____

Date: _____



**ANNEX F
FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY - BID CERTIFICATION**

I, the Bidder, by submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated below. The certifications provided to Canada are subject to verification at all times. I understand that Canada will declare a bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with any request or requirement imposed by Canada may render the bid non-responsive or constitute a default under the Contract.

For further information on the Federal Contractors Program for Employment Equity visit [Employment and Social Development Canada \(ESDC\) – Labour's](#) website.

Date: _____ (YYYY/MM/DD) (If left blank, the date will be deemed to be the bid solicitation closing date.)

Complete both A and B.

A. Check only one of the following:

- A1. The Bidder certifies having no work force in Canada.
- A2. The Bidder certifies being a public sector employer.
- A3. The Bidder certifies being a federally regulated employer being subject to the [Employment Equity Act](#).
- A4. The Bidder certifies having a combined work force in Canada of less than 100 employees (combined work force includes: permanent full-time, permanent part-time and temporary employees [temporary employees only includes those who have worked 12 weeks or more during a calendar year and who are not full-time students]).

A5. The Bidder has a combined workforce in Canada of 100 or more employees; and

- A5.1. The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with ESDC-Labour.

OR

- A5.2. The Bidder certifies having submitted the [Agreement to Implement Employment Equity \(LAB1168\)](#) to ESDC-Labour. As this is a condition to contract award, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC-Labour.

B. Check only one of the following:

- B1. The Bidder is not a Joint Venture.

OR

- B2. The Bidder is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification. (Refer to the Joint Venture section of the Standard Instructions)



**ANNEX G
FINANCIAL EVALUATION OF PROPOSAL (PRICING TABLE)**

The Bidder should complete this pricing schedule and include it in its financial bid.

The number of searches and days are an estimate for financial evaluation purposes only and does not represent a commitment on the part of Canada to purchase services in these amounts.

As a minimum, the Bidder must respond to this pricing schedule by inserting in its financial bid specified below its quoted firm all inclusive firm price rate (in CAD \$) excluding all taxes for the service identified in both Streams.

STREAM 1 – PERCENTAGE OF BASE SALARY

Contract Year (12 months) – 2015 to 2016

TABLE 1						
	EX-01 (\$124,300)*	EX-02 (\$139,300)*	EX-03 (\$155,900)*	EX-04 (\$178,800)*	EX-05 (\$200,300)*	Total
FEE <i>(per search)</i>	%	%	%	%	%	
RATE <i>(per search)</i>	\$	\$	\$	\$	\$	
SEARCHES	2	2	2	1	1	
COST <i>(RATE x SEARCHES)</i>	\$	\$	\$	\$	\$	
TOTAL						\$

*The salary indicated in the table is the maximum salary rate of the required position.
http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/ratesofpay/rapaceexunem02-eng.asp

Option Period Year 1 (12 months) – 2016 to 2017

TABLE 2						
	EX-01 (\$124,300)*	EX-02 (\$139,300)*	EX-03 (\$155,900)*	EX-04 (\$178,800)*	EX-05 (\$200,300)*	Total
FEE <i>(per search)</i>	%	%	%	%	%	
RATE <i>(per search)</i>	\$	\$	\$	\$	\$	
SEARCHES	2	2	2	1	1	
COST <i>(RATE x SEARCHES)</i>	\$	\$	\$	\$	\$	
TOTAL						\$

*The salary indicated in the table is the maximum salary rate of the required position.
http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/ratesofpay/rapaceexunem02-eng.asp



Option Period Year 2 (12 months) - 2017 to 2018

TABLE 3						
	EX-01 (\$124,300)*	EX-02 (\$139,300)*	EX-03 (\$155,900)*	EX-04 (\$178,800)*	EX-05 (\$200,300)*	Total
FEE <i>(per search)</i>	%	%	%	%	%	
RATE <i>(per search)</i>	\$	\$	\$	\$	\$	
SEARCHES	2	2	2	1	1	
COST <i>(RATE x SEARCHES)</i>	\$	\$	\$	\$	\$	
TOTAL						\$

*The salary indicated in the table is the maximum salary rate of the required position.

http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/ratesofpay/rapaceexunem02-eng.asp



STREAM 2 – COST PER DIEM

Contract Year (12 months) – 2015 to 2016

Table 4				
	EX-01 – EX-02 (\$139,300)*	EX-03 (\$155,900)*	EX-04 – EX-05 (\$200,300)*	Total
RATE <i>(per diem)</i>	\$	\$	\$	
DAYS	40	40	40	
COST <i>(RATE x DAYS)</i>	\$	\$	\$	
TOTAL				\$

*The salary indicated in the table is the maximum salary rate of the required position.
http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/ratesofpay/rapaceexunem02-eng.asp

Option Period Year 1 (12 months) – 2016 to 2017

Table 5				
	EX-01 – EX-02 (\$139,300)*	EX-03 (\$155,900)*	EX-04 – EX-05 (\$200,300)*	Total
RATE <i>(per diem)</i>	\$	\$	\$	
DAYS	40	40	40	
COST <i>(RATE x DAYS)</i>	\$	\$	\$	
TOTAL				\$

*The salary indicated in the table is the maximum salary rate of the required position.
http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/ratesofpay/rapaceexunem02-eng.asp



Option Period Year 2 (12 months) - 2017 to 2018

Table 6				
	EX-01 – EX-02 (\$139,300)*	EX-03 (\$155,900)*	EX-04 – EX-05 (\$200,300)*	Total
RATE <i>(per diem)</i>	\$	\$	\$	
DAYS	40	40	40	
COST <i>(RATE x DAYS)</i>	\$	\$	\$	
TOTAL				\$

*The salary indicated in the table is the maximum salary rate of the required position.

http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/ratesofpay/rapaceexunem02-eng.asp

BID CALCULATION SUMMARY:

Table 1 – Total	\$
Table 2 – Total	\$
Table 3 – Total	\$
Table 4 – Total	\$
Table 5 – Total	\$
Table 6 – Total	\$
TOTAL BID VALUE	\$



ANNEX H TASK AUTHORIZATION FORM

Task Authorization Autorisation de tâche		Contract Number - Numéro du contrat
Contractor's Name and Address - Nom et l'adresse de l'entrepreneur	Task Authorization (TA) No. - N° de l'autorisation de tâche (AT)	
	Title of the task, if applicable - Titre de la tâche, s'il y a lieu	
	Total Estimated Cost of Task (GST/HST extra) Coût total estimatif de la tâche (TPS/TVH en sus) \$	
Security Requirements: This task includes security requirements Exigences relatives à la sécurité : Cette tâche comprend des exigences relatives à la sécurité <input type="checkbox"/> No - Non <input type="checkbox"/> Yes - Oui If YES, refer to the Security Requirements Checklist (SCRL) included in the Contract SI OUI, voir la Liste de vérification des exigences relative à la sécurité (LVERG) dans le contrat		
For Revision only - Aux fins de révision seulement		
TA Revision Number, if applicable Numéro de révision de l'AT, s'il y a lieu	Total Estimated Cost of Task (GST/HST Extra) before the revision Coût total estimatif de la tâche (TPS/TVH en sus) avant la révision \$	Increase or Decrease (GST/HST Extra), as applicable Augmentation ou réduction (TPS/TVH en sus), s'il y a lieu \$
Start of the Work for a TA : Work cannot commence until a TA has been authorized in accordance with the conditions of the contract.		Début des travaux pour l'AT : Les travaux ne peuvent pas commencer avant que l'AT soit autorisée conformément au contrat.
1. Required Work: - Travaux requis :		
A. Task Description of the Work required - Description de tâche des travaux requis		See Attached - Ci-joint <input type="checkbox"/>
B. Basis of Payment - Base de paiement		See Attached - Ci-joint <input type="checkbox"/>
C. Cost of Task - Coût de la tâche		See Attached - Ci-joint <input type="checkbox"/>
D. Method of Payment - Méthode de paiement		See Attached - Ci-joint <input type="checkbox"/>



Contract Number - Numéro du contrat

2. Authorization(s) - Autorisation(s)

By signing this TA, the authorized client and (or) the PWGSC Contracting Authority certify(ies) that the content of this TA is in accordance with the conditions of the contract.

En apposant sa signature sur l'AT, le client autorisé et (ou) l'autorité contractante de TPSGC atteste(nt) que le contenu de cette AT respecte les conditions du contrat.

The client's authorization limit is identified in the contract. When the value of a TA and its revisions is in excess of this limit, the TA must be forwarded to the PWGSC Contracting Authority for authorization.

La limite d'autorisation du client est précisée dans le contrat. Lorsque la valeur de l'AT et ses révisions dépasse cette limite, l'AT doit être transmise à l'autorité contractante de TPSGC pour autorisation.

Name and title of authorized client - Nom et titre du client autorisé à signer

Signature

Date

PWGSC Contracting Authority - Autorité contractante de TPSGC

Signature

Date

3. Contractor's Signature - Signature de l'entrepreneur

Name and title of individual authorized - to sign for the Contractor
Nom et titre de la personne autorisée à signer au nom de l'entrepreneur

Signature

Date