

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

**Bid Receiving - PWGSC / Réception des
soumissions - TPSGC**
11 Laurier Street / 11, rue Laurier
Place du Portage, Phase III
Core 0B2 / Noyau 0B2
Gatineau
Québec
K1A 0S5
Bid Fax: (819) 997-9776

**Request For Supply Arrangement -
Demande pour un arrangement en
matière d'approvisionnement**

Offer to: Department of Public Works and Government Services
We hereby offer to provide to Canada, as represented by the Minister
of Public Works and Government Services, in accordance with the
terms and conditions set out herein or attached hereto, the goods,
services, and construction detailed herein and on any attached sheets.

Offre au: Ministère des Travaux publics et des Services
gouvernementaux

Nous offrons par la présente de fournir au Canada, représenté par le
ministre des Travaux publics et des Services gouvernementaux, aux
conditions énoncées ou incluses par référence dans la présente et
aux annexes ci-jointes, les biens, services et construction énumérés
ici et sur toute feuille ci-annexée.

Comments - Commentaires

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

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

Title - Sujet Method of Supply TSPS	
Solicitation No. - N° de l'invitation E60ZN-15TSPS/C	Date 2015-07-15
Client Reference No. - N° de référence du client E60ZN-15TSPS	GETS Ref. No. - N° de réf. de SEAG PW-\$\$ZN-003-29340
File No. - N° de dossier 003zn.E60ZN-15TSPS	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2016-03-31	
Time Zone Fuseau horaire Eastern Standard Time EST	
Delivery Required - Livraison exigée	
Address Enquiries to: - Adresser toutes questions à: Lise Paradis	Buyer Id - Id de l'acheteur 003zn
Telephone No. - N° de téléphone (819)953-0442 ()	FAX No. - N° de FAX (819)997-2229
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction:	
Security - Sécurité This request for a Supply Arrangement does not include provisions for security. Cette Demande pour un arrangement ne comprend pas des dispositions en matière de sécurité.	

Instructions: See Herein

Instructions: Voir aux présentes

Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Telephone No. - N° de téléphone Facsimile No. - N° de télécopieur	
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

Solicitation No. - N° de l'invitation

E60ZN-15TSPS/C

Amd. No. - N° de la modif.

File No. - N° du dossier

003znE60ZN-15TSPS

Buyer ID - Id de l'acheteur

003zn

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

E60ZN-15TSPS

CCC No./N° CCC - FMS No/ N° VME

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

NOTE: AT THIS TIME THERE IS NO ONGOING OPPORTUNITY TO QUALIFY FOR THE STANDING OFFER COMPONENT OF THIS REQUEST FOR SUPPLY ARRANGEMENT AND STANDING OFFER. EVERY EFFORT HAS BEEN MADE TO REMOVE REFERENCE TO THE STANDING OFFER FROM THE DOCUMENT. ANY REMAINING REFERENCE WAS LEFT IN PLACE FOR DOCUMENT CONTINUITY. THE STANDING OFFER COMPONENT OF THE TASK AND SOLUTIONS PROFESSIONAL SERVICES METHOD OF SUPPLY WILL BE SUBJECT TO RENEWAL (RE-COMPETED IN ITS ENTIRETY) ON OR ABOUT JUNE 2016.

TABLE OF CONTENTS

COMPONENT I: REQUEST FOR BIDS AND OFFERS

PART 1 - GENERAL INFORMATION

- 1.1 Introduction
- 1.2 Summary
- 1.3 Security Requirements
- 1.4 Debriefings
- 1.5 Key Terms

PART 2 - BIDDER INSTRUCTIONS

- 2.1 Standard Instructions, Clauses and Conditions
- 2.2 Bid Participation
- 2.3 Submission of Bids
- 2.4 Set-aside for Aboriginal Business
- 2.5 Former Public Servant – Notification
- 2.6 Federal Contractors Program for Employment Equity - Notification
- 2.7 Enquiries - Request for Bids and Offers
- 2.8 Applicable Laws

PART 3 – BID PREPARATION INSTRUCTIONS

- 3.1 Bid Preparation Instructions

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

- 4.1 Evaluation Procedures
- 4.2 Basis of Selection

PART 5 - CERTIFICATIONS

- 5.1 Certifications Precedent to Issuance of a Standing Offer or Supply Arrangement

List of Attachments:

Attachment A – Bidder Profile/Centralized Professional Services System (CPSS)

Supplier Module – Enrollment

Attachment B – Supply Arrangement Technical Evaluation Criteria

Attachment C – Intentionally Left Blank

Attachment D – Intentionally Left Blank

Attachment E – Certifications/CPSS Supplier Module – Data Collection Component (DCC)

Attachment F – Technical Response Template/ CPSS Supplier Module – DCC

Attachment G – Intentionally Left Blank

Attachment H – Standard Instructions – Competitive Requirements – Request for Standing Offers and Supply Arrangements

COMPONENT II: SUPPLY ARRANGEMENT/MODEL BID SOLICITATION AND RESULTING CONTRACT CLAUSES

PART 6A. SUPPLY ARRANGEMENT

- 6.1 Arrangement
- 6.2 Security Requirements
- 6.3 Standard Clauses and Conditions
- 6.4 Term of Supply Arrangement
- 6.5 Authorities
- 6.6 Identified Users
- 6.7 On-Going Opportunity for Qualification
- 6.8 Priority of Documents
- 6.9 Certifications
- 6.10 Applicable Laws
- 6.11 Suspension or Cancellation by Canada
- 6.12 Aboriginal Business Certification (if applicable)
- 6.13 Delivery Requirements Outside Comprehensive Land Claim Settlement Areas
- 6.14 Environmental Considerations
- 6.15 Insurance requirement
- 6.16 Travel and Living
- 6.17 Regions and Metropolitan Areas

PART 6B. BID SOLICITATION

- 6.1 Bid Solicitation Documents
- 6.2 Bid Solicitation Process

PART 6C. RESULTING CONTRACT CLAUSES

- 6.1 General

List of Annexes related to Component II:

Annex A SO/SA - Requirements

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

Annex C SO/SA - Quarterly Usage Report Sample

Annex D SO/SA - Client Satisfaction Form

Annex E SA - Qualified Categories

Annex F SA – Insurance Requirements

PART 1 - GENERAL INFORMATION

1.1 Introduction

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

COMPONENT I – REQUEST FOR BIDS

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

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

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

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

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

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

The Attachments to Component 1 include:

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

COMPONENT II - SUPPLY ARRANGEMENT AND RESULTING CONTRACT CLAUSES

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

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

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

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

The Annexes to Part 6 include:

Annex A SO/SA - Requirements

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

Annex C SO/SA - Quarterly Usage Report Sample

Annex D SO/SA - Client Satisfaction Form

Annex E SA – Qualified Categories

Annex F SA – Insurance Requirements

1.2 Summary

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

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

- ii. **Existing Standing Offer and/or Supply Arrangement Holders**

This document allows existing SA Holders to submit bids to enable them to qualify for those Tiers, Regions, Metropolitan Areas and Categories for which they currently do not have a supply arrangement.

Existing supply arrangement holders are not required to re-qualify for any consultant categories for which they already have a supply arrangement although they must otherwise comply with the requirements of the refresh solicitation.

- iii. **Streams**

TSPS includes the following streams of services:

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

All five (5) Streams will be structured according to the following Tiers:

- Tier 1: Requirements up to and including \$2 million (applicable taxes included);
- Tier 2: Requirements greater than \$2 million (applicable taxes included).

Each Stream is further subdivided into single "Categories".

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

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

All supply arrangement requirements estimated below the NAFTA threshold for services must be conducted using ProServices. Currently, the NAFTA threshold for Services is \$80,400.00 and is revised periodically. Refer to section 1.25.5 of the PWGSC Supply Manual for further information (<https://buyandsell.gc.ca/policy-and-guidelines/supply-manual/section/1/25/5>).

- iv. **The Period of the Instruments**

The Supply Arrangement will remain valid from award until December 31, 2016 or until such time as Canada no longer considers them to be advantageous to use them. The period for awarding contracts under the Supply Arrangement begins on the start date of the Supply Arrangement.

v. Identified Users

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

vi. Bid Solicitation

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

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

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

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

Refer to Component II, Part 6A, 6.4.2 for more information on the Supply Arrangement refresh schedule.

vii. Trade Agreements

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

viii. Designation as Set-Aside

Part of this procurement may be designated by one or more Identified Users as set-aside under the federal government's Procurement Strategy for Aboriginal Business (PSAB). In these specific cases, (i) the procurement is

set aside from the international trade agreements under the provision each has for set-asides for small and minority businesses, and (ii) as per Article 1802 of the AIT, the AIT does not apply.

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

ix. Comprehensive Land Claim Agreements

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

1.3 Security Requirement

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

- 1.3.1 Before issuance of a standing offer or a supply arrangement the Bidder must hold a valid organization security clearance as indicated in Part 6A – Supply Arrangement or Part 7A – Standing Offer, as applicable.
- 1.3.2 Canada will not delay the issuance of any standing offer or supply arrangement to allow Bidders to obtain the required clearance. However in respect of a supply arrangement, should a Bidder receive its required clearance while all other requirements of the bid solicitation have been met and its bid is still valid, Canada will consider awarding a supply arrangement to that Bidder.
- 1.3.3 Bidders who have not yet received their DOS clearance from CISD by the date that the Offer/Arrangement Authority has issued any Standing Offer/Arrangement as a result of this solicitation will be considered non-responsive to this bid solicitation's requirements for the issuance of a standing offer and/or a supply arrangement.
- 1.3.4 Bidders may request that the Standing Offer or Supply Arrangement Authority consider security sponsorship of their candidacy to upgrade it to the next security level that is above the Bidder's current security level or to seek initial DOS clearance. Such sponsorship is only available for one level of upgrade at a time. This request may be made at any time before or after bid closing by sending the request via email to the attention of the Standing Offer or Arrangement Authority.
- 1.3.5 For additional information on security requirements, suppliers should refer to the Industrial Security Program (ISP) of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.
- 1.3.6 Each member of a JV Bidder must satisfy the requirements described in the resulting SO/SA Article entitled "Security Requirement". For any given Contract, the highest level of corporate security attainable by such a JV Bidder through Canadian Industrial Security Directorate (CISD) of PWGSC is the lowest level held by any single member of the JV at the time of issuance relating to that particular Contract. For example, a JV with 5 members is comprised of 4 members holding a valid Facility Security Clearance (FSC) at the Secret level and 1 member holding a valid Designated Organizational Screening (DOS) level. The highest corporate security level for which the JV would be considered under this SO/SA framework would be DOS until such time as the member holding a valid DOS clearance has requested sponsorship via the SO/SA Authority and obtained a valid FSC at the Secret level, as issued by CISD.

1.4 Debriefings

After issuance of the Supply Arrangements resulting from the bid solicitation, Bidders may request a debriefing on the results of the Request for Bids process. Bidders should make the request to the Supply Arrangement Authority within 15 working days of receipt of the results of the Request for Bids process. The debriefings may be in writing, by telephone or in person.

1.5 Key Terms

Task Based Professional Services are services related to a particular activity or initiative that are required to address a specific professional services need, which are usually associated with a specified set of responsibilities. Professional services are purchased typically on a per diem basis and are related to a particular activity or initiative. Tasks can be for short or long periods of time and can be subsets of a larger project. Deliverables are well defined, often with specific timelines. Identified Users are looking for a consultant with direct or specialized knowledge and sufficient expertise to accomplish the work.

New Bidder refers to a bidder that was not issued a SO under TSPS solicitation E60ZN-15TSPS/A and/or a bidder that was not issued a SA under TSPS solicitation E60ZN-15TSPS/A or refresh solicitation E60ZN-15TSPS/C.

Existing or Current SO and/or SA HOLDER refers to a bidder that was issued a SO and/or SA under TSPS solicitation E60ZN-15TSPS/A or TSPS solicitation E60ZN-15TSPS/C.

Centralized Professional Services System or CPSS is a web-based system created as part of PWGSC's Professional Services National Procurement Strategy to support a single portal for professional services. It contains information on methods of supply, which will include TSPS, and reflects standardized business rules. CPSS is comprised of a Supplier Module, a Client Module and a Maintenance Module. The Client Module is used by Government of Canada personnel to process procurement functions. The Maintenance Module is used to administer CPSS and the methods of supply it contains. The Supplier Module allows a bidder through a Main Supplier Contact (as defined below) to:

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

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

Each bidder must enroll and identify a Main Supplier Contact or MSC. The MSC will receive credentials that enable the MSC to access the Supplier Module, as defined in Article 1.5 above. Enrollment is conducted on-line and can be initiated by a bidder at any time, with a typical response time of minutes to receive credentials, where all the necessary information is received by Canada. Instructions for enrollment in the CPSS Supplier Module and other support on the use of the DCC are available at:

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

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

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

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

Refresh solicitation is a solicitation that allows existing and new bidders to provide arrangements to qualify and existing bidders to provide arrangements to qualify for more services throughout the entire period of the Supply Arrangement. Existing bidders are not required to provide an arrangement in order to continue to provide the services for which is currently qualified under its supply arrangement.

Renewal solicitation is a solicitation intended to replace the Supply Arrangements and Standing Offer for the Services on an annual basis. Each such re-competition (a "renewal bid solicitation") requires all bidders, including those who may have received supply arrangements and/or standing offers under the previous solicitation, to submit an arrangement and/or offer in response to the renewal solicitation in order to continue to provide services under its resulting supply arrangements and/or standing offer.

PART 2 - BIDDER INSTRUCTIONS

2.1 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 issued by Public Works and Government Services Canada (PWGSC). The Manual is available on the PWGSC Website: [Standard Acquisition Clauses and Conditions \(https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual\)](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual).

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of this bid solicitation and accept the clauses and conditions of the resulting contract. Attachment H, Standard Instructions – Request for Standing Offers and Supply Arrangements are incorporated and form part of the bid solicitation.

Subsection 5.4 of attachment H, Standard Instructions - Request for standing offers and supply arrangements - Competitive Requirements, is amended as follows:

Delete: 60 days
Insert: 220 days

- 2.1.1 SACC Manual Clauses**
M0019T (2007-05-25) Firm Price and/or Rates
M0220T (2013-04-25) Evaluation of Price

2.2 Bid Participation

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

One legal entity may participate in the submission of:

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

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

2.3 Submission of Bids

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

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

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

2.4 Set-aside for Aboriginal Business

- i. This procurement in whole or in part, may be set aside by one or more Identified Users as set aside for Aboriginal business under the federal government's Set-aside Program for Aboriginal Business. In order to be considered as an Aboriginal Business, Bidders must complete and sign the certification entitled "Aboriginal Business Certification" –at Part 5 - Certifications.
- ii. By executing the certification, the Bidder warrants that it is an Aboriginal business as defined in the Set-aside Program for Aboriginal Business.

2.5 Former Public Servant

2.5.1 Former Public Servant – Notification (Supply Arrangement)

Service contracts awarded to former public servants in receipt of a pension or a lump sum payment must bear the closest public scrutiny and reflect fairness in the spending of public funds. Therefore, the bid solicitation will require that you provide information that, were you to be the successful bidder, your status with respect to being a former public servant in receipt of a pension or a lump sum payment, will be required to report this information on the departmental websites as part of the published proactive disclosure reports generated in accordance with Treasury Board policies and directives on contracts with former public servants, Contracting Policy Notice 2012-2 and the Guidelines on the Proactive Disclosure of Contracts.

2.5.2 Former Public Servant (Standing Offer)

Intentionally Left Blank

2.6 Federal Bidders Program for Employment Equity – Notification (Supply Arrangement)

The Federal Contractor's Program (FCP) for employment equity requires that some Bidders make a formal commitment to Employment and Social Development Canada (ESDC) - Labour to implement employment equity. In the event that this supply arrangement would lead to a contract subject to the Federal Contractor's Program (FCP) for employment equity, the bid solicitation and resulting contract templates would include such specific requirements. Further information on the Federal Contractor's Program (FCP) for employment equity can be found on [Employment and Social Development Canada \(ESDC\) - Labour's](#) website.

2.7 Enquiries - Request for Bids

All enquiries must be submitted in writing to the Standing Offer and/or Supply Arrangement Authority in accordance with the period schedule as set out in the table below. Enquiries received after the time specified in each period may not be answered.

Bidders should make enquiries as early as possible and should not make assumptions about the nature of the requirements of this solicitation.

FIRST BIDDING QUESTION PERIOD:	SECOND BIDDING QUESTION PERIOD:	THIRD BIDDING QUESTION PERIOD:
The end date for the first question period for bidders is August 21, 2015 Eastern Daylight Time at 14:00. Responses to the first question period will be posted on buyandsell.gc.ca .	The end date for the second question period for bidders is November 30, 2015 Eastern Standard Time at 14:00. Responses to the second question period will be posted on buyandsell.gc.ca .	The end date of the third question period for bidders is February 28, 2016 Eastern Standard Time. Responses to the third question period will be posted on buyandsell.gc.ca .
Canada will then respond to the questions from bidders.		Canada does not intend to modify the solicitation during this period.

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

2.8 Applicable Laws

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

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

PART 3 - BID PREPARATION INSTRUCTIONS

Canada requires that bidders provide their bid in hard copy and as an electronic submission as identified in the Bid Submission Grid below. Specifically, bidders must provide the following sections:

- Section I Technical Bid:** To the PWGSC Bid Receiving Unit, one Print copy and one soft copy on USB or CD of the Technical Bid as detailed in Attachment B, except where identified in the Bid Submission Grid (below) as being required to be submitted through the Data Collection Component (DCC) of the Supplier's Module of the CPSS.
- Section II Financial Bid:** Intentionally Left Blank
- Section III Certifications:** For the Certifications as detailed in Component I, Part 5 and Attachment E, a Print copy of the Certification or submission through the DCC, as specified in the Bid Submission Grid below.

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

3.1.1 Format Instructions

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

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

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

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

3.1.2 Data Collection Component of the Supplier's Module of the CPSS

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

To access the Data Collection Component:

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

3.1.3 Bid Submission grid

The purpose of the following grid is to assist Bidders with their bid preparation and bid submission. As the status and circumstances of each bidder is unique, it is the responsibility of each bidder to read all documents related to this

solicitation, and to ensure that all mandatory criteria, Certifications, and elements required for bid validity are met in their bid submission. Where in the Submission Grid the symbol “&” is used, it means that the Bidder must submit the information requested through both methods.

The following terms are used below:

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

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

ADD: Indicates that additional documentation is required to be submitted with the hard copy of the Bid to the Bid Receiving Unit by the submission due date.

BID SUBMISSION GRID

Column A	Column B	Column C	Column D
	<u>New TSPS Bidder:</u> The Bidder is not a current TSPS Holder)	<u>Existing TSPS Holder (whether inactive or active):</u> The Bidder is <u>NOT</u> changing the Technical Response already on file from the previous TSPS Solicitation	<u>Existing TSPS Holder (whether inactive or active):</u> The Bidder <u>IS</u> applying for additional Tier(s) and/or, Category(ies), or is otherwise modifying their Technical Response already on file from the previous TSPS Solicitation
Section I – Technical Response			
Region & Metropolitan Area selection	DCC	no action required	DCC
Mandatory M.1 – all streams	DCC & ADD	no action required	no action required
Mandatory M.2 – all streams	DCC & ADD	no action required	DCC & ADD
Mandatory M.3 – all streams	DCC & ADD	no action required	DCC & ADD
Section II – Financial Bid			
Not Applicable			
Section III – Certifications			
Bidder's Statement	DCC & Print (Attachment E)	no action required	DCC & Print (Attachment E)
Grandfather Certification	N/A	no action required	no action required
FCP EE Certification	DCC	no action required	DCC
Work Force Reduction Program Certification	DCC	no action required	DCC
Former Public Servant Certification	DCC	no action required	DCC

Aboriginal Business Certification	DCC & Print (Part 5 – Certifications)	no action required	DCC
Integrity Provisions – Associated Information	DCC	no action required	DCC
Current Security Clearance and current Document Safeguarding Clearance	DCC	no action required	DCC
Request for Security Sponsorship	DCC	no action required	DCC

Section I: Technical Bid

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

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

Section II: Intentionally Left Blank

Section III: Certifications

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

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the Request for Bids including the technical and RFSO financial evaluation criteria. There are several steps in the evaluation methodology, which are described below. Even though the evaluation and selection will be conducted in steps, the fact that Canada has proceeded to a later step does not mean that Canada has conclusively determined that the Bidder has successfully passed all the previous steps. Canada may conduct steps of the evaluation in parallel.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids. Canada may hire any independent consultant, or use any Government resources, to evaluate any bid. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.

4.1.1 Technical Evaluation

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

4.1.2 Intentionally Left Blank

4.2 Basis of Selection

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

(a) Step 1 – Technical Evaluation:

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

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

(b) Step 2 – Intentionally Left Blank

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

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

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

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

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

PART 5 - CERTIFICATIONS

Bidders must provide the required certifications to be issued a standing offer or supply arrangement. Canada will declare an arrangement or offer non-responsive if the required certifications are not completed and submitted as requested.

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

Joint Venture (JV):

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

5.1 Certifications Precedent to Issuance of a Standing Offer or Supply Arrangement

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 Supply Arrangement/Standing Offer Authority will inform the Bidder of a time frame within which to provide the information. Failure to comply with the request of the Supply Arrangement/Standing Offer Authority and to provide the certifications within the time frame provided will render the bid non-responsive.

(i) Bidder's Statement (All bidders) - see Attachment E of this bid solicitation.

5.1.1 Integrity Provisions - Associated Information

By submitting a bid, the Bidder certifies that the Bidder and its affiliates are in compliance with the provisions as stated in Section 01 Integrity Provisions – at attachment H. The associated information required within the Integrity Provisions will assist Canada in confirming that the certifications are true.

5.1.2 Federal Contractors Program for Employment Equity - Standing Offer Certification Intentionally Left Blank

5.1.3 Aboriginal Business Certification

Bidders seeking to qualify for an Aboriginal Standing Offer and/or Supply Arrangement must complete the certification in the Data Collection Component of CPSS. Bidders must also complete the required information in the certification below and should include it in their arrangements. Suppliers may also satisfy the requirement by reproducing the documents in another way, provided the wording of the document is not changed.

**ABORIGINAL BUSINESS CERTIFICATION
(MANDATORY FOR BIDDERS SEEKING QUALIFICATION FOR ABORIGINAL SO
or SA)**

PLEASE COMPLETE THE STATEMENT BELOW

I, _____ (*Insert Name of duly authorized representative of business*),
want to be considered as an Aboriginal Supplier. []

PLEASE COMPLETE THE INFORMATION REQUIRED BELOW

- (a) I, _____ (*Insert Name of duly authorized representative of business*) hereby certify that _____ (*Insert name of Company*) meets, and will continue to meet throughout the duration of the Aboriginal Supply Arrangement, the requirements described in "Requirements for the Set-aside Program for Aboriginal Business" detailed in [Annex 9.4](#) of the Supply Manual.
- (b) The aforementioned business agrees that any subcontractor it engages with respect to any contract awarded under any resulting Aboriginal Standing Offer and/or Supply Arrangement will satisfy the requirements described in "Requirements for the Set-aside Program for Aboriginal Business" detailed in [Annex 9.4](#) of the Supply Manual.
- (c) The aforementioned business agrees to provide to Canada, immediately upon request, evidence supporting any subcontractor's compliance with the requirements described in "Requirements for the Set-aside Program for Aboriginal Business" detailed in [Annex 9.4](#) of the Supply Manual.

PLEASE CHECK THE APPLICABLE BOXES BELOW

[]	The aforementioned business is an Aboriginal business which is a sole proprietorship, band, limited company, co-operative, partnership or not-for-profit organization.
or	
[]	The aforementioned business is a joint venture between two or more Aboriginal businesses or an Aboriginal business and a non-Aboriginal business
[]	The Aboriginal business or businesses have fewer than six full-time employees.
or	
[]	The Aboriginal business or businesses have six or more full-time employees.

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

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

Name of duly authorized representative of business:

Signature:
Date:

COMPONENT II – SUPPLY ARRANGEMENT AND RESULTING CONTRACT CLAUSES

PART 6A - SUPPLY ARRANGEMENT

6.1 Arrangement

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

6.2 Security Requirements

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

SECURITY REQUIREMENT FOR CANADIAN SUPPLIER:

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

SECURITY REQUIREMENT FOR UNITED STATES OF AMERICA SUPPLIER:

1. The Foreign recipient Supplier shall, at all times during the performance of Supply Arrangement, hold a valid Facility Security Clearance, issued by the NSA/DSA of **the UNITED STATES of AMERICA**, at the equivalent level of CONFIDENTIAL, in accordance with the National Policies of **the UNITED STATES of AMERICA**. All CANADA PROTECTED information / assets accessed by the Foreign recipient Offeror shall NOT be safeguarded at the Foreign recipient's sites.
2. CANADA PROTECTED information/assets shall be released only to Foreign recipient Offeror personnel, who have a need-to-know for the performance of the Supply Arrangement and who have a **Personnel Security Clearance** at the level of CONFIDENTIAL, granted by their respective NSA/DSA, in accordance with the National Policies of **the UNITED STATES of AMERICA**.
3. CANADA PROTECTED information/assets provided or generated pursuant to this Supply Arrangement shall not be further provided to a third party Foreign recipient Subcontractor unless:
 - a. written assurance is obtained from the third-party Foreign recipient's NSA/DSA to the effect that the third-party Foreign recipient Subcontractor has been approved for access to CANADA PROTECTED information by the third-party Foreign recipient's NSA/DSA; and
 - b. written consent is obtained from the NSA/DSA of **the UNITED STATES of AMERICA**, if the third-party Foreign recipient Subcontractor is located in a third country.
4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of their respective NSA/DSA, in accordance with the National Policies of **the UNITED STATES of AMERICA**.
5. The Foreign recipient Offeror shall not disclose the CANADA PROTECTED information to a third party government, person, firm, or representative thereof, without the prior written consent of the Government of Canada. Such consent shall be sought through the recipient's National Security Authority/Designated Security Authority (NSA/DSA). The Canadian DSA is the Director, International Industrial Security Directorate (IISD), Public Works and Government Services Canada (PWGSC).
6. The Foreign recipient Offeror shall not use the CANADA PROTECTED information/assets for any purpose other than for the performance of the Supply Arrangement without the prior written approval of the Government of Canada. This approval must be obtained by contacting the Canadian DSA.
7. The Foreign recipient Offeror visiting Canadian Government or industrial facilities, under this contract, will submit a Request for Visit form to Canada DSA, through their respective NSA/DSA.
8. The Foreign recipient Offeror shall immediately report to its respective NSA/DSA all cases in which it is known or there is reason to suspect that CANADA PROTECTED information/assets furnished to or generated by the Foreign recipient Offeror, pursuant this Supply Arrangement, have been lost or disclosed to unauthorized persons.
9. The Foreign recipient Offeror shall comply with the provisions of the Bilateral Industrial Security Memorandum of Understanding between **the UNITED STATES of AMERICA** and Canada, in relation to equivalencies.
10. The Foreign recipient Offeror must comply with the provisions of the Security Requirements Check List available on the CPSS website at: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/31-eng.html>

11. The FOREIGN recipient Offeror must use the below table of equivalency in conjunction with the above paragraphs, in accordance with the National Policies of **the UNITED STATES of AMERICA** and in accordance with the provisions of the Bilateral Industrial Security Memorandum of Understanding between **the UNITED STATES of AMERICA** and Canada, in relation to the equivalencies of CANADA PROTECTED and / or CLASSIFIED information / assets.

UNITED STATES of AMERICA & CANADA TABLE OF SECURITY CLEARANCE EQUIVALENCY	
CANADA	UNITED STATES of AMERICA
PROTECTED	CONFIDENTIAL

SECURITY REQUIREMENT FOR UNITED KINGDOM SUPPLIER:

1. The Foreign recipient Contractor shall, at all times during the performance of the Contract, hold a valid **Facility Security Clearance**, issued by the NSA/DSA of **the UNITED KINGDOM**, at the equivalent level of CONFIDENTIAL, in accordance with the National Policies of **the UNITED KINGDOM**. All CANADA PROTECTED information / assets accessed by the Foreign recipient Contractor shall NOT be safeguarded at the Foreign recipients sites.
2. CANADA PROTECTED information/assets shall be released only to Foreign recipient Contractor personnel, who have a need-to-know for the performance of the Contract and who have a **Personnel Security Clearance** at the level of CONFIDENTIAL, and/or as prescribed in Appendix A of these clauses, when accessing CANADIAN PROTECTED A information/assets, as required, granted by their respective NSA/DSA, in accordance with the National Policies of the UNITED KINGDOM.
3. CANADA PROTECTED information/assets provided or generated pursuant to this Contract shall not be further provided to a third party Foreign recipient Subcontractor unless:
 - a. written assurance is obtained from the third-party Foreign recipient’s NSA/DSA to the effect that the third-party Foreign recipient Subcontractor has been approved for access to CANADA PROTECTED information by the third-party Foreign recipient’s NSA/DSA; and
 - b. written consent is obtained from the NSA/DSA of **the UNITED KINGDOM**, if the third-party Foreign recipient Subcontractor is located in a third country.
4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of their respective NSA/DSA, in accordance with the National Policies of **the UNITED KINGDOM**.
5. The Foreign recipient Contractor shall not disclose the CANADA PROTECTED information to a third party government, person, firm, or representative thereof, without the prior written consent of the Government of Canada. Such consent shall be sought through the recipient’s National Security Authority/Designated Security Authority (NSA/DSA). The Canadian DSA is the Director International Industrial Security Directorate (IISD), Public Works and Government Services Canada (PWGSC).
6. The Foreign recipient Contractor shall not use the CANADA PROTECTED information/assets for any purpose other than for the performance of the Contract without the prior written approval of the Government of Canada. This approval must be obtained by contacting the Canadian DSA.
7. The Foreign recipient Contractor visiting Canadian Government or industrial facilities, under this contract, will submit a Request for Visit form to Canada DSA, through their respective NSA/DSA. In the cases of the UNITED KINGDOM, the Foreign recipient Contractor are required to submit Request for Visits (RFV's) to **UNITED KINGDOM** International Visits Control Office(IVCO).

8. The Foreign recipient Contractor shall immediately report to its respective NSA/DSA all cases in which it is known or there is reason to suspect that CANADA PROTECTED information/assets furnished to or generated by the Foreign recipient Contractor, pursuant this Contract, have been lost or disclosed to unauthorized persons.
9. The Foreign recipient Contractor shall contact their respective NSA/DSA in order to comply with the provisions of the Bilateral Industrial Security Memorandum of Understanding between **the UNITED KINGDOM** and Canada, in relation to equivalencies.
10. The Foreign recipient Contractor must comply with the provisions of the Security Requirements Check List available on the CPSS website at: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/31-eng.html>.
11. The FOREIGN recipient Contractor must use the below table of equivalency in conjunction with the above paragraphs, in accordance with the National Policies of the UNITED KINGDOM, and in accordance with the provisions of the Bilateral Industrial Security Memorandum of Understanding between the UNITED KINGDOM and Canada, in relation to the equivalencies of CANADA PROTECTED information/ assets.

TABLE OF SECURITY CLEARANCE EQUIVALENCY – CANADA & UK	
CANADA	THE UNITED KINGDOM
PROTECTED A	RESTRICTED See applicable Appendix for details regarding additional security requirements when accessing / for the treatment of CANADA PROTECTED A information/ assets.
PROTECTED B	No Official equivalent in the UK. To be treated AS A MINIMUM OF UK CONFIDENTIAL.

APPENDIX A:

The Foreign recipient Contractor shall also insert this Appendix A into all subcontracts into which it enters that involve access to CANADA PROTECTED A information / assets.

PERSONNEL SECURITY CLEARANCES – when accessing CANADA PROTECTED A information ONLY:

1. The Foreign recipient Contractor shall not grant access to CANADA PROTECTED A information unless its personnel are subject to the below conditions, as a minimum; or have been granted a Personnel Security Clearance at the Confidential level or higher:
 - a. personnel have a valid Baseline Personnel Security Screening (BPSS); and
 - b. personnel have been granted a Criminal Records check by Disclosure Scotland – at the Basic Disclosure level. It is understood that in order to process a BPSS and Criminal Records Check , the following requirements must include:
 - i. BPSS will include confirmation of Identity, Citizenship/Immigration Status, Employment History and a Criminal Records check;
 - ii. for employees unable to provide three years of verifiable history in the UK, an Overseas Check and an Overseas Criminal Records check shall be required;
2. The Foreign subcontractor shall ensure that its personnel provide consent to share results of the BPSS and the Criminal Records check, with the Canadian DSA if requested; and

3. The Foreign subcontractor shall supply, upon request only, an authenticated true copy of the BPSS and Criminal Records check to the Canadian DSA.

6.3 Standard Clauses and Conditions

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

6.3.1 General Conditions

2020 (2015-07-03) General Conditions - Supply Arrangement - Goods or Services, apply to and form part of the Supply Arrangement.

6.3.2 Supply Arrangement Reporting

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

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

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

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

If a Supplier does not receive any Contracts during the period, the Supplier must confirm this by submitting a NIL TSPS QUR report. Simply responding NIL by e-mail will not suffice; a copy of the QUR must be opened, completed and submitted. The Supplier understands that failure to comply may result in the suspension of the Supply Arrangement.

PWGSC reserves the right to suspend the Supplier's Supply Arrangement without notice, if reports are not submitted on time or are inaccurate or incomplete.

6.4 Term of Supply Arrangement

6.4.1 Period of the Supply Arrangement

The period of the Supply Arrangement begins on date of award and ends |December 31, 2016.

6.4.2 Request for Supply Arrangement (RFSA) Bid Solicitations

TSPS Schedule			
	Estimated Posting Date	Estimated Closing Date	Estimated Award Date
Refresh Period 1	July 16, 2015	September 30, 2015	December 15, 2015
Refresh Period 2	October 1, 2015	December 31, 2015	March 15, 2016
Refresh Period 3	January 1, 2016	March 31, 2016	June 15, 2016
Annual Renewal	June 15, 2016	August 31, 2016	December 31, 2016

A Supplier may choose to submit an arrangement in accordance with the above schedule containing an entirely new arrangement, or may propose to modify its arrangement by adding or removing Streams. This schedule may require a revision due to operational requirements, in which case Suppliers will be advised. Participation in the refresh solicitations is entirely optional and not required to maintain any TSPS arrangement.

It is important to note that Suppliers will not be eligible to submit an arrangement at each refresh period. For example, if a Supplier submits an arrangement at Refresh Period 1, the Supplier will not be eligible to submit an arrangement at Refresh Period 2 as their profile will be disabled in the Data Collection Component while the arrangement is under evaluation. This will in no way impact the search results for an existing Supplier's current arrangement.

However, all arrangements whether issued during a refresh solicitation period or as the result of an arrangement submitted on the closing date of an annual renewal solicitation will be replaced when a renewal solicitation occurs. Therefore, all Suppliers must submit an arrangement before the closing date of a renewal solicitation in order to continue to provide services under its resulting Supply Arrangement.

6.5 Authorities

6.5.1 Supply Arrangement Authority

The Supply Arrangement Authority is:

Danielle Gudbranson
Supply Team Leader
Public Works and Government Services Canada
Acquisitions Branch
Professional Services Procurement Directorate
Portage III 11C1
11 Laurier Street
Gatineau, Quebec
K1A 0S5
Telephone: 819-934-0200
Facsimile: 819-997-2229
E-mail address: spts.tsp@tpsgc-pwgsc.gc.ca

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

6.5.2 Supplier's Representative

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

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

Name:

Title:

Telephone:

Facsimile:

Address:

Email:

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

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

6.6 Identified Users

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

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

6.7 On-going Opportunity for Qualification

A Request for supply arrangements refresh will be issued in accordance with the process described at Article 1.2 and Article 6.4.2 above to allow new Suppliers to become qualified. Existing qualified Supplier, who has been issued a supply arrangement, will not be required to submit a new arrangement.

6.8 Priority of Documents

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

- (a) the articles of the Supply Arrangement;
- (b) the general conditions 2020 (2015-07-03), General Conditions - Supply Arrangement - Goods or Services
- (c) Annex E Supply Arrangement – Qualified Categories ;
- (d) Annex A SO/SA – Requirement;
- (e) Annex B SO/SA – TSPS Generic Security Requirements Checklists (SCRLs);
- (f) Annex C SO/SA– Quarterly Usage Report Sample
- (g) Annex D SO/SA – Client Satisfaction Form;
- (h) Annex F SA – Insurance Requirements; **and**
- (i) the Supplier's arrangement dated _____ (“as clarified on _____” *or* “as amended _____”).

6.9 Certifications

6.9.1 Compliance

The continuous compliance with the certifications provided by the Supplier in its arrangement and the ongoing cooperation in providing associated information are conditions of issuance of the Supply Arrangement . Certifications are subject to verification by Canada during the entire period of the Supply Arrangement and of any resulting contract that would continue beyond the period of the Supply Arrangement. If the Supplier does not comply with any certification, fails to provide the associated information, or if it is determined that any certification made by the Supplier in the arrangement is untrue, whether made knowingly or unknowingly, Canada has the right to terminate any resulting contract for default and suspend or cancel the Supply Arrangement.

6.10 Applicable Laws

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

6.11 Suspension or Cancellation by Canada

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

6.12 Aboriginal Business Certification

6.12.1 Where an Aboriginal Business Certification has been provided, the Supplier warrants that its certification of compliance is accurate and complete and in accordance with the "Requirements for the Set-aside Program for Aboriginal Business" detailed in Annex 9.4 of the Supply Manual.

6.12.2 If such a Certification has been provided, the Supplier must keep proper records and documentation relating to the accuracy of the certification provided to Canada. The Supplier must obtain the written consent of the Contracting Authority before disposing of any such records documentation supporting the accuracy of the certification until the expiration of six (6) years after final payment in a contract made under the Supply Arrangement, or until settlement of all outstanding claims and disputes, resulting from a dispute in a contract made under the Supply Arrangement, whichever is later. All such records and documentation must at all times during the retention period be open to audit, inspection and examination by representatives of Canada, who may make copies and take extracts. The Supplier must provide all facilities for such audits.

6.12.3 Nothing in this clause must be interpreted as limiting the rights and remedies, which Canada may otherwise have pursuant to the Contract made under the Supply Arrangement.

6.13 Delivery Requirements Outside a Comprehensive Land Claims Settlement Area

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

6.14 Environmental Considerations

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

a) Paper consumption:

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

b) Travel requirements:

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

6.15 Insurance requirement

For Contracts issued under a SA including Tier 1 only:

The Supplier 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 Supplier is at its own expense and for its own benefit and protection. It does not release the Supplier from or reduce its liability under the Contract.

For Contracts issued under a SA including Tier 2:

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

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

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

6.16 Travel and Living

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

6.17 Regions and Metropolitan Areas

The document titled "Definitions of the National Zone, Regions and Metropolitan Areas" at the following link are incorporated by reference into this supply arrangement, with the exception that for the purposes of this supply arrangement, the National Zone is to be considered as another Region:
<http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/dznrrm-dnzrma-eng.html>

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

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

PART 6B. BID SOLICITATION

6.1 Bid Solicitation Documents

Canada will use the following bid solicitation template based on the estimated dollar value and complexity of the requirement:

- High Complexity (HC) for more complex requirements

A model Request For Proposals (RFP) and resulting contract clauses document will be created and available for use for Identified Users.

The bid solicitation will contain as a minimum the following:

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

6.2 Bid Solicitation Process

6.2.1 General

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

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

If Supplier have been invited on a particular solicitation by e-mail, then a notice of proposed procurement (NPP) will be posted on GETS to inform Supplier there is a solicitation opportunity available.

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

6.2.2 Identification of Contract Authorities:

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

6.2.3 Tier 1 Requirement Limitations:

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

- (i) **Intentionally Left Blank**
- (ii) **Requirement Valued at or below NAFTA Threshold (applicable taxes included):**
All SA requirements valued at or below the NAFTA Threshold (applicable taxes included) must be conducted using ProServices.
- (iii) **Requirement Valued Above NAFTA Threshold (applicable taxes included):**
Identified Users may issue a contract to a Supplier satisfying the requirement particulars as set out in the bid solicitation in accordance with the following:
 - (a) selecting by name ten Supplier from the CPSS Client Module, with the following five randomly selected by the CPSS Client Module, or
 - (b) selecting more than ten Supplier from the Client Module, in which case five additional Supplier will be randomly selected by the CPSS Client Module, or
 - (c) selecting less than ten Supplier from the Client Module, in which case the CPSS Client Module will randomly select a number of Supplier that, in addition to the Supplier selected by the Client, will total fifteen; and
 - (d) publishing a Notice of Proposed Procurement (NPP) (<https://buyandsell.gc.ca/policy-and-guidelines/supply-manual/section/4/75/15>) to GETS in which the client identifies those invited Suppliers as per (a) through (c) above; and
 - (e) the Identified User must then invite the 15 chosen suppliers to submit a proposal via e-mail.

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

- (iv) **No Limit to Invitation Process:**
Once the minimum of Supplier has been selected as per (ii) or (iii) at any time during the course of the procurement process the Client may choose to invite additional Supplier using the CPSS Client Module. There is no limit to the maximum number of Supplier that may be invited to submit a proposal under Tier 1; however, excepting the circumstances of 6.2.5 below, Supplier may not submit a proposal in response to a solicitation unless they have been invited to do so. However, should an uninvited supply arrangement holder wish to be invited, it may contact the Contracting Authority to request an invitation at any time prior to five days before the published bid closing date, and an invitation will be made to that supply arrangement holder unless it would not be consistent with the efficient operation of the procurement system. In no circumstance will such an invitation require Canada to extend a bid closing date. Where additional invitations are made during the solicitation process, they may not be reflected in a bid solicitation amendment.
- (v) **Minimum Period to submit proposal:**
At a minimum, each tier 1 bid solicitation issued will provide Supplier with the following minimum number of calendar days to submit their proposal, which time may be extended based upon a requirement's complexity:
 - (a) Requirements less than or equal to the NAFTA threshold = five calendar days.
 - (b) Requirements greater than the NAFTA threshold up to and including \$2M = fifteen calendar days.

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

6.2.4 Tier 2 Requirements:

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

- (i) **Tier 2 Invitation of Supplier:** Canada will invite through GETS all qualified Tier 2 Supplier to submit a proposal in response to a bid solicitation.

- (ii) **Minimum Period to Submit Proposal:** At a minimum, each Tier 2 bid solicitation will provide qualified Supplier with twenty calendar days to submit their proposal, which may be extended based on a requirement's complexity.
- (iii) **Category Not Offered Under Tier 1:** For Tier 1 requirements where no supply arrangement for a specific Category and/or Level exists, where a Tier 2 Supply Arrangement exists for that Category and Level, PWGSC may act as the Contracting Authority and invite qualified Tier 2 Supplier to submit a proposal in accordance with the processes stated in 6.2.3 above.

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

6.2.5 All Invited to Bid:

For a requirement in either Tier, all Supplier qualified in each relevant Category, Region and Metropolitan Area will be invited by e-mail or GETS to bid where any Supplier has been provided with a request for information in respect of services that in whole or in part appear in the requirement to be solicited under this supply arrangement.

6.2.6 Disclosing of incumbent information

By submitting a bid, the Supplier agrees that during a solicitation under this supply arrangement, if the Supplier has performed services for Canada under any current or past TSPS instrument, Canada may disclose such fact (including the previous contract value and date of issuance) during any such solicitation for replacement or follow-on services.

PART 6C. RESULTING CONTRACT CLAUSES

6.1 General

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

For any contract to be awarded Canada will be using the template:

- High Complexity for more complex requirements

A model RFP and resulting contract clauses document will be created and available for use for identified users

Attachment A
Bidder Profile/Centralized Professional Services System (CPSS) Supplier Module - Enrollment

Bidders are required to submit a portion of their technical bid through the [Open Solicitations](#) on the Supplier Dashboard of the PWGSC Centralized Professional Services System (CPSS) e-Portal at : <https://sspc-fournisseur-cpss-supplier.tpsgc-pwgsc.gc.ca/VoirTableauDeBordPublique-ViewPublicDashboard-eng>.

Therefore, all Bidders that want to bid will have to establish an account in the Supplier Module of the PWGSC CPSS e-Portal. To access the Supplier Module in CPSS, follow the link:
<http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spc-cps-eng.html>

In order to register as a supplier in the CPSS e-Portal and submit a proposal in response to the TSPS, Bidders must have a Procurement Business Number (PBN). A PBN can be obtained from the [Supplier Registration Information](#) office (<https://srisupplier.contractsCanada.gc.ca/index-eng.cfm?af=ZnVzZWFjdGlvbj1yZWdpc3Rlci5pbmRybyZpZD03>) .

Bidders must also submit their technical bid in response to the requirements outlined in Attachment B – Supply Arrangement Technical Evaluation Criteria and/or Attachment C – Standing Offer Technical Evaluation Criteria to the PWGSC Bid Receiving Unit before the closing date and time of this RFSO/SA as indicated on Page 1 of this bid solicitation.

Bidders are required to submit their Certifications in accordance with Part 5 – Certifications of this RFSO/SA.

Please refer to Component 1, Part 3 Bid Preparation Instruction, Bid Submission Grid for more information on how to complete your bid depending on your firm’s situation. The purpose of the grid is to assist Bidders with their bid preparation and bid submission. As the status and circumstances of each Bidder is unique, it is the responsibility of each Bidder to read all documents related to this solicitation, and to ensure that all mandatory criteria, Certifications, and elements required for bid validity are met in their bid submission. Where in the Bid Submission Grid the symbol “&” is used, it means that the Bidder must submit the information requested through both methods.

Attachment B
Supply Arrangement Technical Evaluation Criteria

Instructions to Bidders:

The evaluation criteria contained in this Attachment B is divided into three sections as follows.

1) Section 1 – Technical Evaluation Criteria for Streams 1, 2, 3 and 5:

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

2) Section 2 – Technical Evaluation Criteria for Stream 4:

- Stream 4: Real Property Project Management Services

3) Section 3 – Unsubstantiated Categories

All Bidders must meet the mandatory requirements set out in this Attachment B by either:

- (a) demonstrating through the submission of proof in their bid that they meet the mandatory requirement, or

By submitting a bid, Bidders are indicating that they consider themselves to be fully compliant in accordance with the mandatory requirements of this Attachment B, and will agree to the supply arrangement terms and conditions identified in Component II if a supply arrangement is issued to them.

Each Project Summary must be submitted using the Streams 1, 2, 3 and 5 Project Summary Template and the Stream 4 Project Summary Template provided below. Different phases of a single project must have a separate Project Summary Template in order for each of the phases to be considered as individual “projects”.

All Bidders are advised that only listing experience i.e. copying and pasting the services from the Category descriptions detailed in Annex A SO/SA – Requirements for Services, without providing any supporting data to describe when, where and how such experience was obtained will not be considered to be "demonstrated" for the purpose of the evaluation. All professional experience must be fully documented and demonstrated in the arrangement.

Bidders must identify the Categories for each Tier that they are proposing to provide under any resulting SA.

Existing SA Holders are not required to re-qualify for any Categories for which they already have an SA although they must otherwise comply with the requirements of the solicitation.

Example 1, Company ABC is an Existing SA Holder for 3 Categories in Stream 2 and does not wish to supply more Categories. There is no action required by the Existing SA Holder.

Example 2, Company XYZ is an Existing SA Holder for 6 Categories in Stream 2 and wishes to supply more Categories in the same Stream. The Existing SA Holder must comply with the mandatory criteria B1-MTT2 and B1-MTT3 for Stream 2 for the additional categories they wish to supply.

Example 3, Company 123 is an Existing SA Holder for 6 Categories in Stream 2 and wishes to supply more Categories in the same Stream and to apply for Categories in a new Stream (Stream 1). The Existing SA Holder must comply with the mandatory criteria B1-MTT2 and B1-MTT3 for the additional categories they wish to supply under Stream 2 and for the categories they wish to supply under Stream 1.

Bidders that have indicated that they wish to provide for both Tiers, and who meet the Mandatory Criteria of Tier 2 will be considered to have met the Mandatory Criteria of Tier 1.

Section 1 - Technical Evaluation Criteria for Streams 1, 2, 3 and 5

Definitions for the purposes of Section 1:

An “Outside Client” is any legal entity that is not parent, subsidiary or affiliate of the Bidder, a member of a joint venture with the Bidder or any other entity that does not deal at arm’s length with the Bidder.

A “Project” is a contractual agreement between the Bidder and an Outside Client under which the Bidder has provided professional services to the Outside Client and has fulfilled all of the requirements of the project with regards to the specific Category being examined. Different phases of a single contract may be cited in more than one project summary if that contract was a multi-phase Project with specific deliverables and distinct phases and if those phases associated with the concerned Category have all been completed between May 26, 2006 and the closing date of this bid solicitation.

Mandatory Technical Criteria (MTT)			
For the purpose of the mandatory technical criteria B1-MTT2 and B1-MTT3, the experience of the Bidder and its subcontractors, affiliates, subsidiaries and suppliers will be considered if the experience was obtained working on a project billed to the Bidder. (See ‘Note to Bidders’ below)			
Number	TIER 1 Mandatory Technical Criterion	TIER 2 Mandatory Technical Criterion	Bid Preparation Instructions
B1- MTT1	Minimum years in business: The Bidder must have been in business for a minimum of 3 years as of the closing date of this bid solicitation.	Minimum years in business: The Bidder must have been in business for a minimum of 3 years as of the closing date of this bid solicitation.	In order to demonstrate this, the Bidder must provide proof (i.e. incorporation, business registration or tax returns) in its arrangement confirming the number of years its firm has been in business. In case of a Joint Venture (JV), one member of the JV must meet the minimum 3-year requirement in B1-MTT1 and all other member(s) of the JV must have been in business for a minimum of 1 year as of the closing date of this bid solicitation.
B1- MTT2	Project Summaries Per Stream: The Bidder must qualify for at least 2 Categories within a single Stream, using project summaries, in order for the	Project Summaries Per Stream: The Bidder must qualify for at least 4 Categories within a single Stream using project summaries in order for the	The Categories are defined in Annex A SO/SA – Requirements for Services of this RFSOSA. Bidders may demonstrate experience for multiple

<p>Bidder’s proposal to be considered responsive for that Stream.</p> <p>The Bidder must submit a minimum of 3 to a maximum of 6 different project summaries per Stream in which they are proposing to supply Categories.</p> <p>For project summaries to qualify, they must meet the following criteria:</p> <ul style="list-style-type: none"> a) The projects must have been completed between May 26, 2006 and the closing date of this bid solicitation. b) Each project must have a minimum value of \$20,000.00 (excluding taxes and travel). c) Total level of effort for each Category demonstrated by the projects must be a minimum of 20 working days (7.5 hours equals 1 working day). d) The projects must demonstrate a minimum of 4 service tasks identified at Annex A SO/SA – Requirements for Services for each of the Categories being substantiated by the projects. <p>The Bidder must substantiate, through project summaries, at least 50% of the Categories for which the Bidder is proposing. The remaining 50% can be substantiated</p>	<p>Bidder’s proposal to be considered responsive for that Stream.</p> <p>The Bidder must submit a minimum of 3 to a maximum of 6 different project summaries per Stream in which they are proposing to supply Categories.</p> <p>For project summaries to qualify, they must meet the following criteria:</p> <ul style="list-style-type: none"> a) The projects must have been completed between May 26, 2006 and the closing date of this bid solicitation. b) Each project must have a minimum value of \$50,000.00 (excluding taxes and travel). c) Total level of effort for each Category demonstrated by the projects must be a minimum of 20 working days (7.5 hours equals 1 working day). d) The projects must demonstrate a minimum of 4 service tasks identified at Annex A SO/SA – Requirements for Services for each of the Categories being substantiated by the projects. <p>The Bidder must substantiate, through project summaries, at least 50% of the Categories for which the Bidder is proposing. The remaining 50% can be</p>	<p>Categories in each project summary. However, at least 3 project summaries must be provided per applicable Stream, even if the Bidder is proposing to supply less than 3 Categories in that Stream. Each of the project summaries must demonstrate at least 1 Category proposed in the Stream.</p> <p>If the Bidder is an existing SA Holder and is adding a Category or Categories to a Stream for which they are already qualified, the Bidder is only required to submit a minimum of 1 project summary for the new Category or Categories being added. If the Bidder is an existing SA Holder and is submitting a new Stream for which the Bidder is not already qualified, the Bidder must submit the minimum of 3 to a maximum of 6 projects for that Stream.</p> <p>A maximum of 6 project summaries per Stream will be evaluated. The proposed project summaries will be evaluated in order of presentation. Proposed project summaries above the maximum will not be evaluated. The maximum of 6 project summaries per Stream is cumulative for the renewal solicitation and each subsequent refresh solicitation. That is, if a Bidder submits 4 project summaries for a particular Stream at the renewal solicitation in order to qualify for Categories within that Stream, the Bidder can only</p>
--	--	---

	<p>through project references in B1-MTT3. (In the case of an odd number of Categories, the 50% is rounded upward. For example, if the Bidder is proposing 5 Categories within a Stream, a minimum of 3 Categories must be demonstrated through Project summaries and the remaining 2 categories can be demonstrated through project references as defined in B1-MTT3). The Bidder may choose to substantiate all projects through project summaries, in which case, B1-MTT3 does need to be met.</p> <p>A Bidder may use a project summary(ies) submitted in a previous TSPS solicitation provided the criteria noted above (a through d) are met.</p>	<p>substantiated through project references in B1-MTT3. (In the case of an odd number of Categories, the 50% is rounded upward. For example, if the Bidder is proposing 5 Categories within a Stream, a minimum of 3 Categories must be demonstrated through project summaries and the remaining 2 Categories can be demonstrated through project references as defined in B1-MTT3). The Bidder may choose to substantiate all projects through project summaries, in which case, B1-MTT3 does need to be met.</p> <p>A Bidder may use a project summary(ies) submitted in a previous TSPS solicitation provided the criteria noted above (a through d) are met.</p>	<p>submit a maximum of 2 additional project summaries to qualify for additional Categories within that Stream for subsequent refresh solicitations.</p> <p>The same project summaries may be used to substantiate different Streams within the Bidder’s proposal.</p> <p>Each Project Summary <u>must</u> be provided using the Streams 1, 2, 3 and 5 Project Summary Template below. Different phases of a single project must have a separate Project Summary Template in order for each of the phases to be considered as individual “projects”.</p> <p>A maximum of 5 call-ups on a same Standing Offer may be submitted to form a single Project providing the Standing Offer authorized to the Bidder includes professional services listed in Annex A SO/SA - Requirements for Services of this RFSA. More than 1 project can be formed using a maximum of 5 call-ups on the same Standing Offer.</p> <p>For a Joint Venture (JV), Categories provided by any JV member will be considered. Each JV member must have provided at least 1 of the Categories identified for a minimum of 20 working days (7.5 hours equals 1 working day) and must demonstrate with a project summary or substantiating reference. If the JV is submitting only 1 Category, whether at the renewal</p>
--	--	--	---

			solicitation or any subsequent refresh solicitation, the services provided by any one of the JV members will be considered.
B1-MTT3	<p>Substantiating References Per Stream:</p> <p>If the Bidder does not substantiate all projects through project summaries, the Bidder must provide a substantiating reference for the remaining 50% (or less) of the Categories not substantiated by a project summary in B1-MTT2. The reference must confirm that the Bidder has provided the Category for a minimum level of effort of 20 working days (7.5 hours equals 1 working day) between May 26, 2006 and the closing date of this bid solicitation.</p>	<p>Substantiating References Per Stream:</p> <p>If the Bidder does not substantiate all projects through project summaries, the Bidder must provide a substantive reference for the remaining 50% (or less) of the Categories not substantiated by a project summary in B1-MTT2. The reference must confirm that the Bidder has provided the Category for a minimum level of effort of 20 working days (7.5 hours equals 1 working day) between May 26, 2006 and the closing date of this bid solicitation.</p>	<p>The Categories are defined in Annex A SO/SA – Requirements for Services of this RFSOSA.</p> <p>For each substantiating reference, the Bidder should provide the following information: Outside Client Name, Contact Name, Telephone and E-mail address (if available).</p> <p>Multiple Categories may have the same substantiating reference.</p> <p>References by Canada are acceptable.</p> <p>For a Joint Venture (JV), Categories provided by any JV member will be considered. Each JV member must have provided at least 1 of the Categories identified for a minimum of 20 working days (7.5 hours equals 1 working day) and must demonstrate with a project summary or substantiating reference. If the JV is submitting only 1 Category, whether at the renewal solicitation or any subsequent refresh solicitation, the services provided by any one of the JV members will be considered.</p>

NOTE TO BIDDERS:

See the following examples of acceptable and non-acceptable experience for the purposes of the Mandatory Technical Criteria (MTT) above:

Scenario 1:

Company A (subcontractor) performs a part of the work and bills Company B (contractor). Company B in turn bills Company C (the outside Client) for the entire work. Can company A claim the experience? Can Company B claim the experience?

- Company A can only claim the experience for which they billed Company B for the work. Company B can also claim this experience because they billed Company C for the work.

Scenario 2:

Company X performs work on a project that's related to the work done by Company B. Both bill Company C independently of each other. Can Company X claim the experience of the entire project?

- Company X cannot claim work billed by Company B and vice versa. Company X can only claim the portion of the project completed by Company X.

Scenario 3:

Joint Venture member Z did the work but did not bill the outside client directly, Joint Venture member Y billed the outside client. Can Joint Venture member Z claim this experience?

- Both Joint Venture members can claim this experience, provided Joint Venture member Z billed Joint Venture Y.

Scenario 4:

If the Bidder is a subsidiary of a Parent Company, can the Bidder submit the Parent Company's experience?

- No, the Bidder cannot use the experience of their Parent Company. The experience submitted must be the Bidder's experience.

For the purpose of B1-MTT1 for Section 1:

If the Bidder has been incorporated or otherwise created less than 3 years as of the closing date of this bid solicitation, Canada will consider the 3 year minimum requirement to be met if the Bidder demonstrates to Canada's satisfaction that:

- a) it has been incorporated or otherwise created as the result of a corporate change under which it has in law assumed all of the assets, undertaking, operational capability, skills and resources of other legal entities;
- b) the corporate change was solely for tax or other purposes unrelated to the business of the other legal entities and does not affect the ability of the Bidder to carry on the business that had been carried on by the other legal entities;
- c) the Bidder has carried on the business of all of the other legal entities in the normal course, uninterrupted from and after the date of the corporate change;
- d) the Bidder, at the closing date of this bid solicitation, maintains the same assets, undertaking, operational capability, skills and resources as the other legal entities had maintained before the corporate change; and
- e) the period that the Bidder has been in business since it was created added to the period that the other legal entities were in business before the corporate change totals a minimum of 3 years.

In these circumstances, Canada may require from the Bidder an unqualified legal opinion from an independent law firm stating that the Bidder legal entity meets all of the above requirements. Canada reserves the right to require other detail and material to verify that the above requirements are met. If Canada is not satisfied that the above requirements have been met, the Bidder legal entity's arrangement will be considered non-responsive.

Canada reserves the right to request proof of any information provided by the Bidder. If the information cannot be validated, the Bidder's Arrangement will be considered non-responsive.

For the purpose of B1-MTT2 for Section 1:

Project Summary Template for Streams 1, 2, 3 and 5:

Project Summary # P__

<u>PROJECT DESCRIPTION</u> (*) – Denotes a mandatory field. All other fields should be completed.	
Brief description of the Scope and Objective of the project. (*)	

Name of the Company that provided the services (*) <i>(If the Bidder is a JV, insert the name of the JV member who provided the services or if the services were provided by the JV itself, insert the JV name.)</i>	
Project Value (*) <i>(total amount invoiced by the Bidder excluding taxes and travel)</i>	
Outside Client Name (*)	
Contact name	
Phone number	
Fax number	
E-mail address	
Address	
Start date (or phase of project) (*)	_____ (month/year)
End date (or phase of project) (*)	_____ (month/year) If the end date is in the same month as the closing date of the bid solicitation, please specify the day/month/year of the project end date.
<u>CATEGORY SUBSTANTIATION</u>	
There are 4 Categories in this template. If more Categories are demonstrated by the identified project, please add rows (5., 6., etc.) as required. All fields below must be completed.	
1. Category: <Insert Category name>	_____ days
a. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.> <Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.>	(min 20 days)

<p>b. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	
<p>c. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	
<p>d. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	
<p>A minimum of 4 service tasks from Annex A SO/SA – Requirement for Services must be demonstrated (a. Through d. above). The Bidder may demonstrate additional service tasks from Annex A for the Category above by inserting additional rows (e., f., etc.) as required.</p>	
<p>2. Category: <Insert Category name></p>	<p>_____ days</p>
<p>a. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	<p>(min 20 days)</p>
<p>b. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	
<p>c. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	

<p>d. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	
<p>A minimum of 4 service tasks from Annex A SO/SA – Requirement for Services must be demonstrated (a. Through d. above). The Bidder may demonstrate additional service tasks from Annex A for the Category above by inserting additional rows (e., f., etc.) as required.</p>	
<p>3. Category: <Insert Category name></p>	<p>_____ days</p>
<p>a. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	<p>(min 20 days)</p>
<p>b. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	
<p>c. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	
<p>d. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	
<p>A minimum of 4 service tasks from Annex A SO/SA – Requirement for Services must be demonstrated (a. Through d. above). The Bidder may demonstrate additional service tasks from Annex A for the Category above by inserting additional rows (e., f., etc.) as required.</p>	
<p>4. Category: <Insert Category name></p>	<p>_____ days</p>

<p>a. Service Task <i><Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></i></p> <p><i><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></i></p>	<p>(min 20 days)</p>
<p>b. Service Task <i><Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></i></p> <p><i><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></i></p>	
<p>c. Service Task <i><Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></i></p> <p><i><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></i></p>	
<p>d. Service Task <i><Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></i></p> <p><i><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></i></p>	
<p>A minimum of 4 service tasks from Annex A SO/SA – Requirement for Services must be demonstrated (a. Through d. above). The Bidder may demonstrate additional service tasks from Annex A for the Category above by inserting additional rows (e., f., etc.) as required.</p>	

Section 2 - Mandatory Technical Evaluation Criteria for Stream 4

Definitions for the purposes of Section 2:

An “Outside Client” is any legal entity that is not parent, subsidiary or affiliate of the Bidder, a member of a joint venture with the Bidder or any other entity that does not deal at arm’s length with the Bidder.

A "Real Property Project" is a project involving strategic analysis, planning, acquisition, management, construction, renovation or disposal of real property. Real Property is land and buildings (including leases).

The “Value” of a Real Property Project is the actual or anticipated amount to be spent (received) on land and buildings upon the completion of the Real Property Project.

Note to Bidders: the definition of Real Property Services (formerly known Professional Services Component) has not changed.

The “Real Property Services” of a Real Property Project is a contractual agreement between the Bidder and an Outside Client under which the Bidder has provided Professional Services to the Outside Client and has fulfilled all of the Professional Services requirements with regards to the specific Category in Stream 4 being examined.

Different phases of a single Professional Services contract may be cited in more than one project summary if that contract was a multi-phase contract with specific deliverables and distinct phases and if those phases associated with the applicable Category have all been completed between May 26, 2006 and the closing date of this bid solicitation. Also, different phases of a single Real Property Project may be cited in more than one project summary if that Real Property Project was a multi-phase project with specific deliverables and distinct phases. The phases must be clearly identified in the project summary.

Mandatory Technical Criteria (MT)			
For the purpose of the mandatory technical criteria B2-MTT2 and B2-MTT3 the experience of the Bidder and its subcontractors, affiliates, subsidiaries and suppliers will be considered if the experience was obtained working on a Real Property Project billed to the Bidder. (See “Note to Bidder” in Section 1.)			
Number	TIER 1 Mandatory Technical Criterion	TIER 2 Mandatory Technical Criterion	Bid Preparation Instructions
B2- MTT1	Minimum years in business: The Bidder must have been in business for a minimum of 3 years as of the closing date of this bid solicitation.	Minimum years in business: The Bidder must have been in business for a minimum of 5 years as of the closing date of this bid solicitation.	In order to demonstrate this, the Bidder must provide proof (i.e. incorporation, business registration or tax returns) in its arrangement confirming the number of years its firm has been in business.

			In case of a JV, one member of the Joint Venture must meet the minimum year requirement in B2-MTT1 (3 years for B2-MTT1 Tier 1 and 5 years for B2-MTT1 Tier 2) and all other member(s) of the JV must have been in business for a minimum of 1 year as of the closing date of this bid solicitation
B2-MTT2	<p>Project Summaries for Stream 4:</p> <p>A minimum of three different Real Property Projects must be submitted. Each Real Property Project must have a minimum value of \$5M.</p> <p>The Bidder must qualify for at least 2 Categories in Stream 4 using project summaries in order for the Bidder’s proposal to be considered responsive for that Stream.</p> <p>The Bidder must submit a minimum of 3 to a maximum of 6 different Real Property project summaries for Stream 4.</p> <p>For a project summary to qualify, it must meet the following criteria:</p> <ul style="list-style-type: none"> a) The Real Property Services of the Real Property Project must have been completed between May 26, 2006 and the closing date of this bid solicitation. b) The Real Property Services of a Real Property Project must have a minimum value of \$50,000 (not including taxes and travel). c) Total level of effort for each Category demonstrated by 	<p>Project Summaries for Stream 4:</p> <p>A minimum of three different Real Property Projects must be submitted. Each Real Property Project must have a minimum value of \$10M.</p> <p>The Bidder must qualify for at least 2 Categories in Stream 4 using project summaries in order for the Bidder’s proposal to be considered responsive for that Stream.</p> <p>The Bidder must submit a minimum of 3 to a maximum of 6 different Real Property project summaries for Stream 4.</p> <p>For a project summary to qualify, it must meet the following criteria:</p> <ul style="list-style-type: none"> a) The Real Property Services of the Real Property Project must have been completed between May 26, 2006 and the closing date of this bid solicitation. b) The Real Property Services of a Real Property Project must have a minimum value of \$200,000 (not including taxes and travel). c) Total level of effort for each Category demonstrated by 	<p>The Categories are defined in Annex A SO/SA – Requirements for Services of this RFSOSA.</p> <p>Bidders may demonstrate experience for multiple Categories in each project summary. However, a minimum 3 different project summaries must be provided for Stream 4, even if the Bidder is proposing to supply less than 3 Categories. Each of the project summaries must demonstrate at least 1 Category proposed in the Stream.</p> <p>If the Bidder is an existing SA Holder and is adding a Category or Categories to a Stream for which they are already qualified, the Bidder is only required to submit a minimum of 1 project summary for the new Category or Categories being added.</p> <p>If the Bidder is an existing SA Holder and is</p>

	<p>the project must be a minimum of 20 working days (7.5 hours equals 1 working day).</p> <p>d) The project must demonstrate a minimum of 4 service tasks identified at Annex A SO/SA – Requirements for Services for each of the Categories being substantiated by the project. Where Category service tasks are broken down into 2 parts, Part A and Part B, a minimum of 2 of the 4 service tasks must be from Part A and the remaining, if any, from Part B.</p> <p>The Bidder must substantiate, through project summaries, at least 50% of the Categories for which the Bidder is proposing. The remaining 50% can be substantiated through project references in B2-MTT3. (In the case of an odd number of Categories, the 50% is rounded upward. For example, if the Bidder is proposing 5 Categories within Stream 4, a minimum of 3 Categories must be demonstrated through project summaries and the remaining 2 categories can be demonstrated through project references as defined in B2-MTT3). The Bidder may choose to substantiate all projects through project summaries, in which case, B2-MTT3 does need to be met.</p> <p>A Bidder may use a project summary(ies) submitted in a previous TSPS solicitation provided the criteria noted above (a through d) are met.</p>	<p>the project must be a minimum of 20 working days (7.5 hours equals 1 working day).</p> <p>d) The project must demonstrate a minimum of 4 service tasks identified at Annex A SO/SA – Requirements for Services for each of the Categories being substantiated by the project. Where Category service tasks are broken down into 2 parts, Part A and Part B, a minimum of 2 of the 4 service tasks must be from Part A and the remaining, if any, from Part B.</p> <p>The Bidder must substantiate, through project summaries, at least 50% of the Categories for which the Bidder is proposing. The remaining 50% can be substantiated through project references in B2-MTT3. (In the case of an odd number of Categories, the 50% is rounded upward. For example, if the Bidder is proposing 5 Categories within Stream 4, a minimum of 3 Categories must be demonstrated through project summaries and the remaining 2 categories can be demonstrated through project references as defined in B2-MTT3). The Bidder may choose to substantiate all projects through project summaries, in which case, B2-MTT3 does need to be met.</p> <p>A Bidder may use a project summary(ies) submitted in a previous TSPS solicitation provided the criteria noted above (a through d) are met.</p>	<p>submitting a new Stream for which the Bidder is not already qualified, the Bidder must submit the minimum of 3 to a maximum of 6 projects for that Stream.</p> <p>A maximum of 6 project summaries per Stream will be evaluated. The proposed project summaries will be evaluated in order of presentation. Proposed project summaries above the maximum will not be evaluated. The maximum of 6 project summaries per Stream is cumulative for the renewal solicitation and each subsequent refresh solicitation. That is, if a Bidder submits 4 project summaries for a particular Stream at the renewal solicitation in order to qualify for Categories within that Stream, the Bidder can only submit a maximum of 2 additional project summaries to qualify for additional Categories within that Stream for subsequent refresh solicitations.</p> <p>Each Project Summary must be provided using the Stream 4 Project Summary Template below. Different phases of a single project must have a separate Project Summary Template in order for each of the phases to be considered</p>
--	---	---	--

			<p>as individual “projects”.</p> <p>A maximum of 5 call-ups on a same Standing Offer may be submitted to form one single Project providing the Standing Offer authorized to the Bidder includes professional services listed in Annex A SO/SA - Requirements for Services of this RFSA. More than 1 project can be formed using a maximum of 5 call-ups on the same Standing Offer.</p> <p>Categories provided by any JV member will be considered. Each JV member must have provided at least 1 of the Categories identified for a minimum of 20 working days (7.5 hours equals 1 working day) and must demonstrate with a project summary or substantiating reference. If the JV is submitting only 1 Category, whether at the renewal solicitation or any subsequent refresh solicitation, the services provided by any one of the JV members will be considered.</p>
<p>B2-MTT3</p> <p>Substantiating References for Stream 4:</p> <p>If the Bidder does not substantiate all projects through Project Summaries, the Bidder must provide a substantiating reference for the remaining 50% (or less) of the Categories not substantiated by a</p>	<p>Substantiating References for Stream 4:</p> <p>If the Bidder does not substantiate all projects through Project Summaries, the Bidder must provide a substantiating reference for the remaining 50% (or less) of the Categories not substantiated by a</p>	<p>The Categories are defined in Annex A <u>SO/SA – Requirements for Services</u> of this RFSOSA.</p> <p>For each substantiating reference, the Bidder should provide the</p>	

	<p>Project Summary in B2-MTT2. The reference must confirm that the Bidder has provided the Category for a minimum level of effort of 20 working days (7.5 hours equals 1 working day) between May 26, 2006 and the closing date of this bid solicitation.</p>	<p>project summary in B2-MTT2. The reference must confirm that the Bidder has provided the Category for a minimum level of effort of 20 working days (7.5 hours equals 1 working day) between May 26, 2006 and the closing date of this bid solicitation.</p>	<p>following information: Outside Client Name, Contact Name, Telephone and E-mail address (if available). Multiple Categories may have the same substantiating reference. References by Canada are acceptable. Categories provided by any JV member will be considered. Each JV member must have provided at least 1 of the Categories identified for a minimum of 20 working days (7.5 hours equals 1 working day) and must demonstrate with a project summary or substantiating reference.</p>
--	---	---	---

For the purpose of B2-MTT1 for Section 2:

If the Bidder has been incorporated or otherwise created less than 3 years for B2-MTT1 Tier 1 and 5 years for B2-MTT1 Tier 2 as of the closing date of this bid solicitation, Canada will consider the minimum years requirement to be met if the Bidder demonstrates to Canada's satisfaction that:

- a) it has been incorporated or otherwise created as the result of a corporate change under which it has in law assumed all of the assets, undertaking, operational capability, skills and resources of other legal entities;
- b) the corporate change was solely for tax or other purposes unrelated to the business of the other legal entities and does not affect the ability of the Bidder to carry on the business that had been carried on by the other legal entities;
- c) the Bidder has carried on the business of all of the other legal entities in the normal course, uninterrupted from and after the date of the corporate change;

- d) the Bidder, as at the closing date of this bid solicitation, maintains the same assets, undertaking, operational capability, skills and resources as the other legal entities had maintained before the corporate change; and
- e) the period that Bidder has been in business since it was created added to period that the other legal entities were in business before the corporate change totals a minimum of 3 years for B2-MTT1 Tier 1 and 5 years for B2-MTT1 Tier 2.

In these circumstances, Canada may require from the Bidder an unqualified legal opinion from an independent law firm stating that the Bidder legal entity meets all of the above requirements. Canada reserves the right to require other detail and material to verify that the above requirements are met. If Canada is not satisfied that the above requirements have been met, the Bidder legal entity's arrangement will be considered non-responsive.

Canada reserves the right to request proof of any information provided by the Bidder. If the information cannot be validated, the Bidder's Arrangement will be considered non-responsive.

For the purpose of B2-MTT2 for Section 2:

Project Summary Template for Stream 4:

Project Summary # P__

<u>PROJECT DESCRIPTION</u>	
(*) – Denotes a mandatory field. All other fields should be completed.	
Brief description the Scope and Objective of the Real Property Project, clearly demonstrating this is a Real Property Project. (*) <i>(Simply copying and pasting the "Real Property Project" definition is not considered demonstrating.)</i>	
Real Property Project Value (*)	
Brief description of the Scope and Objective of the Real Property Services of the Real Property Project including a detailed description of the professional services component. (*)	
Real Property Services Value of	

the Real Property Project (*) <i>(total amount invoiced by the Bidder excluding taxes and travel)</i>	
Start date of the Real Property Services (*)	_____ (month/year)
End date of the Real Property Services (*)	_____ (month/year) If the end date is in the same month as the closing date of the bid solicitation, please specify the day/month/year of the project end date.
Name of the Company that provided the Real Property Services (*) <i>(If the Bidder is a JV, insert the name of the JV member who provided the services or if the services were provided by the JV itself, insert the JV name.)</i>	
Outside Client Name (*)	
Contact name	
Phone number	
Fax number	
E-mail address (if available)	
Address	
<u>CATEGORY SUBSTANTIATION</u>	
There are 4 Categories in this template. If more Categories are demonstrated by the identified project, please add rows (5., 6., etc.) as required. All fields below must be completed.	
1. Category: <Insert Category name>	_____ days
a. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.> <Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.>	(min 20 days)

<p>b. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	
<p>c. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	
<p>d. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	
<p>A minimum of 4 service tasks from Annex A SO/SA – Requirement for Services must be demonstrated (a. Through d. above). Where Category service tasks are broken down into 2 parts, Part A and Part B, a minimum of 2 of the 4 service tasks must be from Part A and the remaining, if any, from Part B. The Bidder may demonstrate additional service tasks from Annex A for the Category identified above by inserting additional rows (e., f., etc.) as required.</p>	
<p>2. Category: <Insert Category name></p>	<p>_____days</p>
<p>a. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	<p>(min 20 days)</p>
<p>b. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	
<p>c. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	

<p>d. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	
<p>A minimum of 4 service tasks from Annex A SO/SA – Requirement for Services must be demonstrated (a. Through d. above). Where Category service tasks are broken down into 2 parts, Part A and Part B, a minimum of 2 of the 4 service tasks must be from Part A and the remaining, if any, from Part B. The Bidder may demonstrate additional service tasks from Annex A for the Category identified above by inserting additional rows (e., f., etc.) as required.</p>	
<p>3. Category: <Insert Category name></p>	<p>_____ days</p>
<p>a. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	<p>(min 20 days)</p>
<p>b. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	
<p>c. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	
<p>d. Service Task <Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></p> <p><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></p>	
<p>A minimum of 4 service tasks from Annex A SO/SA – Requirement for Services must be demonstrated (a. Through d. above). Where Category service tasks are broken down into 2 parts, Part A and Part B, a minimum of 2 of the 4 service tasks must be from Part A and the remaining, if any, from Part B. The Bidder may demonstrate additional service tasks from Annex A for the Category identified above by inserting additional rows (e., f., etc.) as required.</p>	
<p>4. Category: <Insert Category name></p>	<p>_____ days</p>

<p>a. Service Task <i><Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></i></p> <p><i><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></i></p>	<p>(min 20 days)</p>
<p>b. Service Task <i><Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></i></p> <p><i><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></i></p>	
<p>c. Service Task <i><Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></i></p> <p><i><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></i></p>	
<p>d. Service Task <i><Insert one of the service tasks from Annex A SO/SA – Requirements for Services for the Category identified above.></i></p> <p><i><Insert a paragraph demonstrating how the Bidder meets this service task. Simply copying and pasting the service task is not considered demonstrating.></i></p>	
<p>A minimum of 4 service tasks from Annex A SO/SA – Requirement for Services must be demonstrated (a. Through d. above). Where Category service tasks are broken down into 2 parts, Part A and Part B, a minimum of 2 of the 4 service tasks must be from Part A and the remaining, if any, from Part B. The Bidder may demonstrate additional service tasks from Annex A for the Category identified above by inserting additional rows (e., f., etc.) as required.</p>	

Section 3 - Unsubstantiated Categories – Applicable to All Streams

Based on the number of Categories proposed by the Bidder within the same Stream in **B1-MTT2** and **B1-MTT3** and for **B2-MTT2** and **B2-MTT3**, the Bidder may also propose to supply unsubstantiated Categories without providing a project summary or reference. The Bidder, however, is limited to a maximum number of unsubstantiated Categories equal to 50% of total proposed Categories within that Stream in **B1-MTT2** and **B1-MTT3** and for **B2-MTT2** and **B2-MTT3**. If a Bidder proposes an odd number, the 50% will be calculated by rounding downward to the next whole number (for instance 3.5 would be rounded downward to 3). The Bidder must specify, in their proposal, the Categories for which they are requesting without substantiation. The Bidder should prioritize (by numbering from highest priority to lowest) those requested Categories they are requesting without a Project Summary or Substantiating Reference. Should the number of responsive Categories not be sufficient to allow for all requested unsubstantiated Categories to be considered; only the unsubstantiated Categories with the highest priority rating will be considered to maintain the 50% ratio.

Example 1: If Bidder B proposed to supply all Categories under a particular Stream, then no unsubstantiated Categories can be obtained under this Stream.

Example 2: If Bidder C proposed to supply 6 of the 10 Categories under a particular Stream, then Bidder C may obtain unsubstantiated Categories equal to 50% of the total Categories proposed and for which Bidder C is deemed responsive.

If all 6 Categories are responsive, then the Bidder can obtain 3 unsubstantiated Categories under the respective Stream. If only 5 of the 6 Categories are responsive, then the Bidder can obtain 2 unsubstantiated Categories under the respective Stream.

Example 3: If Bidder E was awarded a Supply Arrangement under E60ZN-15TSPS/A or E60ZN-15TSPS/C and would like to obtain unsubstantiated Categories in a particular Stream, Bidder E must submit Categories through substantiation (Project Summaries and Substantiated References). That is, Bidder E must meet B1-MTT2 and B1-MTT3 for Streams 1, 2, 3 and 5 and B2-MTT2 and B2-MTT3 for Stream 4 for new Categories under those Streams.

Attachment C

Intentionally Left Blank

Attachment D

Intentionally Left Blank

Attachment E
Certification/CPSS Supplier Module – Data Collection Component (DCC)

1. BIDDERS STATEMENT (ALL BIDDERS)

All Bidders must sign and submit the following “Bidder’s Statement” with the hard copy of their bid to the Bid Receiving Unit by the date and, time of the date of bid submission:

We certify that all statements made with regard to these requirements are accurate and factual, and we are aware that the Department of Public Works and Government Services Canada reserves the right to verify any information provided in this regard. Untrue statements may result in the Bidder’s proposal being declared non-compliant in its entirety, current TSPS SO/SA Holders becoming ineligible to receive further solicitations, and any other action which Canada may consider appropriate.

SIGNATURE: _____ DATE: _____

Print Name: _____

Legal Name of Bidder: _____

(ALL BIDDERS: Print, sign, and submit this certification with the hard copy of your bid)

ATTACHMENT F
TECHNICAL RESPONSE TEMPLATE / CPSS SUPPLIER MODULE - DCC

The Data Collection Component of CPSS can be accessed through the CPSS website:
<http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spc-cps-eng.html>

Note to Bidders:

The metropolitan areas and the regions are independent from one another and care should be taken when making a selection.

1. By selecting "all Regions and Metropolitan areas" in the DCC, the bidder is selecting all possible regions and metropolitan areas including the "National Zone".
2. By selecting "National Zone" in the DCC, the Bidder is not automatically selecting all Regions and/or Metropolitan Areas; the Bidder is only selecting the zone known as "National Zone".

For example, when a client runs a search under the "National Zone", they are indicating that the work is to be performed at the Contractor's location and is not required to be performed in any specific geographic location. One possible scenario is that the client for whom the work is performed is in Halifax, while the Contractor could be located in Vancouver and no travel is required on the Contractor's behalf.

3. Region in the DCC, the Bidder is not automatically selecting the Metropolitan areas within that Region.

For example, if you wish to offer services in the Atlantic Region, including the metropolitan areas of Halifax and Moncton, then you must select all of them in the DCC (ie: the Atlantic Region, the Halifax metropolitan area, and the Moncton metropolitan area). A bidder who indicates in the DCC that they want to provide services to the Atlantic Region but does not select Halifax or Moncton, will result in their company not appearing on any search result lists where the client department runs the search under the metropolitan areas of Halifax or Moncton.

"Definitions of the National Zone, Regions and Metropolitan Areas" can be found here:
<http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/dznrrm-dnzmra-eng.html>

ATTACHMENT G

Intentionally Left Blank

ATTACHMENT H
STANDARD INSTRUCTIONS - REQUEST FOR STANDING OFFERS AND SUPPLY ARRANGEMENTS -
COMPETITIVE REQUIREMENTS

General Information

- 01 Integrity Provisions – Bids
- 02 Procurement Business Number
- 03 Standard Instructions, Clauses and Conditions
- 04 Definition of Supplier
- 05 Submission of Bids
- 06 Late Bids
- 07 Delayed Bids
- 08 Transmission by Facsimile
- 09 Customs Clearance
- 10 Legal Capacity
- 11 Rights of Canada
- 12 Rejection of Bids
- 13 Communications - Solicitation Period
- 14 Bid Costs
- 15 Conduct of Evaluation
- 16 Joint Venture
- 17 Conflict of Interest - Unfair Advantage
- 18 Entire Requirement
- 19 Further Information

General Information

This bid solicitation solicits bids that may result in a supply arrangement (SA), a standing offer (SO), or both. An SA and an SO are two types of instruments used as methods of supply by Public Works and Government Services Canada (PWGSC).

An SO is used to satisfy the requirements of departments and agencies by arranging with suppliers to submit a SO to provide goods, services or both during a specified period. Specific departments and agencies are then authorized by PWGSC to make call-ups against the standing offer detailing the exact quantities of goods or level of services they wish to order at a particular time, during the effective period of the SO in accordance with the predetermined conditions.

This bid solicitation is an invitation to suppliers to provide PWGSC with a bid which contains an SO. The level of services and estimated expenditure specified in the bid solicitation are only an approximation of requirements given in good faith. The bid solicitation does not commit PWGSC to authorize the utilization of an SO or to procure or contract for any services. The SO is not a contract. The issuance by PWGSC of an SO and Call-up Authority to successful suppliers and to departments and agencies authorized to make call-ups does not constitute an agreement by Canada to order any or all of the services offered. Departments and agencies may make one or several call-ups against an SO.

An SA is a method of supply that consists of an arrangement between Canada and pre-qualified suppliers that allows identified users to solicit bids from a pool of pre-qualified suppliers for specific requirements within the scope of the SA. An SA is not a contract for the provision of the services described in it and neither party is legally bound as a result of signing an SA alone. The intent of an SA is to establish a framework to permit expeditious processing of individual bid solicitations which result in legally binding contracts for the services described in those bid solicitations.

This bid solicitation is an invitation to suppliers to become pre-qualified suppliers by providing PWGSC with a bid which contains an arrangement to enable them to respond to individual bid solicitations issued under the SA framework. The list of pre-qualified suppliers will be used as a source list for procurement within the scope of the SA and only suppliers who are pre-qualified at the time a given bid solicitation is issued under the SA framework will be eligible to bid. The SA includes a set of predetermined conditions that will apply to subsequent bid solicitations and contracts. The SA may include ceiling prices which may be lowered based on an actual requirement or scope of work described in a bid solicitation.

01 (2015-07-03) Integrity Provisions - Bids

1. Interpretation

For the purposes of these Integrity Provisions, the following definitions apply:

"Administrative Agreement"

is a negotiated agreement between a supplier/potential supplier and the Minister of PWGS as provided for in the [*Ineligibility and Suspension Policy*](#).

"Affiliate"

is a person, including, but not limited to, organizations, bodies corporate, societies, companies, firms, partnerships, associations of persons, parent companies or subsidiaries, whether partly or wholly-owned, as well as individuals, directors, officers and key employees if:

- i. one controls or has the power to control the other, or

- ii. a third party has the power to control both.

"Control"
means

- a. direct control, such as where:
 - i. a person controls a body corporate if securities of the body corporate to which are attached more than 50 percent of the votes that may be cast to elect directors of the body corporate are beneficially owned by the person and the votes attached to those securities are sufficient, if exercised, to elect a majority of the directors of the body corporate;
 - ii. a person controls a corporation that is organized on a cooperative basis if the person and all of the entities controlled by the person have the right to exercise more than 50 percent of the votes that may be cast at an annual meeting or to elect the majority of the directors of the corporation;
 - iii. a person controls an unincorporated entity, other than a limited partnership, if more than 50 percent of the ownership interests, however designated, into which the entity is divided are beneficially owned by that person and the person is able to direct the business and affairs of the entity;
 - iv. the general partner of a limited partnership controls the limited partnership; and
 - v. a person controls an entity if the person has any direct or indirect influence that, if exercised, would result in control in fact of the entity.
- b. deemed control, such as where:
a person who controls an entity is deemed to control any entity that is controlled, or deemed to be controlled, by the entity
- c. indirect control, such as where:
a person is deemed to control, within the meaning of paragraph (a) or (b), an entity where the aggregate of
 - i. any securities of the entity that are beneficially owned by that person, and
 - ii. any securities of the entity that are beneficially owned by any entity controlled by that person

is such that, if that person and all of the entities referred to in paragraph (c)(ii) that beneficially own securities of the entity were one person, that person would control the entity.

"Ineligibility"

means not eligible for the issuance of a supply arrangement nor for contract award.

"Suspension"

means a determination of temporary ineligibility by the Minister of PWGS.

2. Statement

- a. Suppliers must comply with the [Code of Conduct for Procurement](#) and be eligible for the issuance of a supply arrangement or contract award under the [Ineligibility and Suspension Policy](#). In addition, Suppliers must respond to Requests for Supply Arrangements (RFSA) in an honest, fair and comprehensive manner, and that accurately reflect their capacity to satisfy the requirements stipulated in the RFSA, Supply Arrangement (SA),

E60ZN-15TSPS/C

Attachment H

Page 3 of 16

Requests for proposals from SA holders, bid solicitations and any resulting contracts, and submit arrangements, bids as well as enter into contracts only if they will fulfill all obligations of the Contract.

- b. By submitting an arrangement, Suppliers confirm that they understand that being convicted of certain offences will render them ineligible to be issued a Supply Arrangement or to be awarded a contract. Canada will declare non-responsive any arrangement in respect of which the information requested is incomplete or inaccurate, or in respect of which the information contained in the certifications is found by Canada to be untrue in any respect, at the time of issuance of the Supply Arrangement (SA). If it is determined by the Minister of PWGS, after issuance of the SA, that the Supplier made a false declaration, Canada will, following a notice period, have the right to cancel the SA and to terminate for default any resulting contracts.

3. List of Names

- a. Suppliers who are incorporated, including those submitting an arrangement as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Supplier. Suppliers submitting an arrangement as sole proprietorship, as well as those submitting an arrangement as a joint venture, must provide the name of the owner(s). Suppliers submitting an arrangement as societies, firms, or partnerships do not need to provide lists of names.
- b. If the required list of names has not been received by the time the evaluation of arrangements is completed, Canada will inform the Supplier of a time frame within which to provide the information. Failure to provide the names within the time frame specified will render the arrangement non-responsive. Providing the required names is a mandatory requirement for a Supply Arrangement to be issued.
- c. The Supplier must immediately inform Canada in writing of any changes affecting the list of names of directors during this procurement process.

4. Request for Additional Information

By submitting an arrangement, the Supplier certifies that it is aware, and that its Affiliates are aware, that Canada may request additional information, certifications, validations from a third party qualified by the Minister of PWGS, and other evidentiary elements proving identity or eligibility to contract with Canada. Canada may also verify the information provided by the Supplier, including the information relating to convictions for certain offences and any conditional or absolute discharges specified in these Integrity Provisions.

5. Lobbying Act

By submitting an arrangement, the Supplier certifies that neither it nor any of its Affiliates have directly or indirectly, paid or agreed to pay, and will not, directly or indirectly, pay a contingency fee to any individual for the solicitation, negotiation or obtaining of the Supply Arrangement and any resulting contracts if the payment of the fee would require the individual to file a return under section 5 of the [Lobbying Act](#).

6. Canadian Offences Resulting in Legal Incapacity

By submitting an arrangement, the Supplier certifies that:

- a. it and the Affiliates of the Supplier have not been convicted of or pleaded guilty to an offence under any of the following provisions which would result in a legal incapacity under section 750(3) of the [Criminal Code](#) and for which they have not been pardoned or received a record of discharge under the Canadian Pardons subsection:

- i. paragraph 80(1)(d) (*False entry, certificate or return*), subsection 80(2) (*Fraud against Her Majesty*) or section 154.01 (*Fraud against Her Majesty*) of the *Financial Administration Act*, or
 - ii. section 121 (*Frauds on the government and Contractor subscribing to election fund*), section 124 (*Selling or Purchasing Office*), section 380 (*Fraud*) for fraud committed against Her Majesty or section 418 (*Selling defective stores to Her Majesty*) of the *Criminal Code*, or
- b. the Supplier has not been convicted of or pleaded guilty to the offences described in paragraph (a) and certifies that it has not directed, influenced, authorized, assented to, acquiesced in or participated in the commission or omission of the acts or offences that would render that Affiliate ineligible to be issued a supply arrangement or to be awarded a contract as described in (a).

7. Canadian Offences

By submitting an arrangement, the Supplier certifies that:

- a. the Supplier and the Affiliates of the Supplier have not, in the last three years, from the arrangement submission date, been convicted of or pleaded guilty to an offence under any of the following provisions for which they would be ineligible be issued a supply arrangement or to be awarded a contract under these Integrity Provisions and for which they have not been pardoned or received a record of discharge under the Canadian Pardons subsection:
- i. section 119 (*Bribery of judicial officers, etc*), section 120 (*Bribery of officers*), section 346 (*Extortion*), sections 366 to 368 (*Forgery and other offences resembling forgery*), section 382 (*Fraudulent manipulation of stock exchange transactions*), section 382.1 (*Prohibited insider trading*), section 397 (*Falsification of books and documents*), section 422 (*Criminal breach of contract*), section 426 (*Secret commissions*), section 462.31 (*Laundering proceeds of crime*) or sections 467.11 to 467.13 (*Participation in activities of criminal organization*) of the *Criminal Code*, or
 - ii. section 45 (*Conspiracies, agreements or arrangements between competitors*), section 46 (*Foreign directives*), section 47 (*Bid rigging*), section 49 (*Agreements or arrangements of federal financial institutions*), section 52 (*False or misleading representation*), section 53 (*Deceptive notice of winning a prize*) of the *Competition Act*, or
 - iii. section 239 (*False or deceptive statements*) of the *Income Tax Act*, or
 - iv. section 327 (*False or deceptive statements*) of the *Excise Tax Act*, or
 - v. section 3 (*Bribing a foreign public official*), section 4 (*Accounting*), or section 5 (*Offence committed outside Canada*) of the *Corruption of Foreign Public Officials Act*, or
 - vi. section 5 (*Trafficking in substance*), section 6 (*Importing and exporting*), or section 7 (*Production of substance*) of the *Controlled Drugs and Substance Act*; or
- b. the Supplier has not been convicted of or pleaded guilty to the offences described in paragraph (a) and it has not directed, influenced, authorized, assented to, acquiesced in or participated in the commission or omission of the acts or offences that would render that Affiliate ineligible to be issued a supply arrangement or to be awarded a contract as described in (a).

8. Foreign Offences

By submitting an arrangement, the Supplier certifies that:

- a. the Supplier and its Affiliates have not, in the last three years, from the arrangement submission date, been convicted of or pleaded guilty to an offence in a jurisdiction other than Canada that would, in Canada's opinion, be similar to an offence referenced in the Canadian Offences Resulting in Legal Incapacity and the Canadian Offences subsections, and for which it would be ineligible to be issued a supply arrangement or to be awarded a contract under these Integrity Provisions and for which they have not been pardoned under the Foreign Pardons subsection and:
 - i. the court, before which the Supplier or its Affiliate appeared, acted within the court's jurisdiction;
 - ii. the Supplier or its Affiliate appeared during the court's proceedings or submitted to the court's jurisdiction;
 - iii. the court's decision was not obtained by fraud, and
 - iv. the Supplier or its Affiliate was entitled to present to the court every defence that the Supplier or its Affiliate would have been entitled to present had the proceeding been tried in Canada; or
- b. it has not been convicted of or pleaded guilty to the offences described in paragraph (a) and certifies that it has not directed, influenced, authorized, assented to, acquiesced in or participated in the commission or omission of the acts or offences that would render that Affiliate ineligible to be issued a supply arrangement or awarded a contract as described in (a).

9. Ineligibility for Issuance of a Supply Arrangement

- a. The Supplier confirms that it understands that where it or any of its Affiliates have been convicted of certain offences or have been held responsible of certain acts, as described under the Canadian Offences Resulting in Legal Incapacity, the Canadian Offences, the Foreign Offences and the Lobbying Act subsections, the Supplier or its Affiliate is ineligible to be issued a supply arrangement, subject to a Public Interest Exception.
- b. The Supplier confirms that it understands that it is ineligible for the issuance of a supply arrangement where it has been so determined by the Minister of PWGS under the [*Ineligibility and Suspension Policy*](#) and that the period of ineligibility or suspension has not expired.

10. Declaration of Convicted Offences

Where a Supplier or its Affiliate is unable to certify that it has not been convicted of any of the offences referenced under the Canadian Offences Resulting in Legal Incapacity, the Canadian Offences and the Foreign Offences subsections, the Supplier must provide with its arrangement the completed [Declaration Form](#), to be given further consideration in the procurement process.

11. Period of Ineligibility

The following rules determine the period for which a Supplier or its Affiliate that has been convicted of certain offences is, ineligible to be issued a supply arrangement or to be awarded a contract:

- a. for all offences referenced under the Canadian Offences Resulting in Legal Incapacity subsection for which a Supplier or an Affiliate of the Supplier has pleaded guilty to or has been convicted of, the period of ineligibility for the issuance of a supply arrangement or for contract award is indefinite, subject to the Canadian Pardons subsection.

- b. subject to an Administrative Agreement, for all offences referenced under the Canadian Offences and Foreign Offences subsections for which a Supplier or an Affiliate of the Supplier has pleaded guilty to or been convicted of, as the case may be, in the last three years, from the arrangement submission date, the period of ineligibility for the issuance of a supply arrangement or for contract award is ten years from the date of determination by the Minister of PWGS, subject to the Canadian Pardons and Foreign Pardons subsections.
 - c. subject to an Administrative Agreement, for violations of matters referenced in the Lobbying Act subsection for which a Supplier or an Affiliate of the Supplier has been found responsible, as the case may be, in the last three years, from the arrangement submission date, the period of ineligibility for the issuance of a supply arrangement or for contract award is ten years from the date of determination by the Minister of PWGS, subject to the Canadian Pardons and Foreign Pardons subsections.
12. Canadian Pardons
- A determination of ineligibility for the issuance of a supply arrangement or for contract award will not be made or maintained by the Minister of PWGS under these Integrity Provisions, in respect of an offence or act that gave rise or that could give rise to a determination of ineligibility, if the Supplier or its Affiliate has:
- a. been granted an absolute discharge in respect of the offence, or has been granted a conditional discharge in respect of the offence and those conditions have been satisfied;
 - b. been granted a pardon under Her Majesty's royal prerogative of mercy;
 - c. been granted a pardon under section 748 of the [Criminal Code](#);
 - d. received a record of suspension ordered under the [Criminal Records Act](#); and
 - e. been granted a pardon under the [Criminal Records Act](#), as that Act read immediately before the day section 165 of the Safe Streets and Communities Act comes into force.
13. Foreign Pardons
- A determination of ineligibility for the issuance of a supply arrangement or for award of government contracts will not be made or maintained, as the case may be, by the Minister of PWGS in respect of matters referenced in the Foreign Offences subsection and with respect to an offence or act that gave rise or will give rise to a determination of ineligibility, if the Supplier or its Affiliate, has at any time, benefited from foreign measures that are similar to Canadian pardons, conditional discharges, absolute discharges, record suspensions, or restoration of legal capacities by the Governor in Council.
14. Suspension of Period of Ineligibility
- The Supplier confirms that it understands that a determination of ineligibility for the issuance of a supply arrangement or for award of government contracts made under these Integrity Provisions may be suspended by the Minister of PWGS through an Administrative Agreement, to the extent that it is permissible in law. The period of ineligibility applicable to that Supplier or its Affiliate and the right to participate in a given procurement process are guided by the terms and conditions of the Administrative Agreement. Subject to the Public Interest Exception, an Administrative Agreement may only suspend a period of ineligibility on solicitations issued after it has been concluded.
15. Period of Ineligibility for Providing False or Misleading Information
- The Supplier confirms that it understands that where it has made a false declaration or provided false or misleading information under these Integrity Provisions, the Minister of PWGS will declare a Supplier to be ineligible to be issued a supply arrangement or awarded a contract for a period of ten years. The period of ineligibility is effective from the date of determination by the Minister of PWGS.

16. Period of Ineligibility for Breaching Administrative Agreements

The Supplier confirms that it understands that where it has concluded an Administrative Agreement and that it has breached any of its terms and conditions, the Minister of PWGS will lengthen the period of ineligibility for a period to be determined by the Minister of PWGS.

17. Suspension of a Supplier

The Supplier confirms that it understands that the Minister of PWGS may suspend a Supplier from being issued a supply arrangement or from being awarded a contract for a period of up to 18 months, subject to renewal, pending completion of the criminal proceeding, if the Supplier has been charged with any of the offences listed in the Canadian Offences Resulting in Legal Incapacity, the Canadian Offences and the Foreign Offences subsections or if the Supplier has admitted to being guilty of any of these offences. The period of suspension is effective from the date of determination by the Minister of PWGS. A period of suspension does not suspend all other periods of ineligibility that may be imposed on a Supplier by the Minister of PWGS.

18. Third Party Validation

The Supplier confirms that it understands that where it or any of the Supplier's Affiliates has been subject to a period of ineligibility to be issued a supply arrangement or to be awarded a contract, for which the Canadian Pardons and the Foreign Pardons subsections do not apply, the Supplier must provide by the Request for Supply Arrangements (RFSA) closing date, a confirmation from an independent third party, recognized in advance by the Minister of PWGS, confirming that measures have been put in place in order to avoid the reoccurrence of such wrongdoings that led to the convictions. Failure to provide the said confirmation from an independent third party renders this arrangement non-responsive.

19. Subcontractors

The Supplier must ensure that contracts with first tier subcontractors include Integrity Provisions similar to those imposed in the contract(s) resulting from the Supply Arrangement.

20. Public Interest Exception

The Supplier confirms that it understands:

- a. that, with the exception of a legal incapacity to contract resulting from section 750(3) of the *Criminal Code*, Canada may issue a Supply Arrangement with a Supplier, or any of its Affiliates, which have been convicted of or have pleaded guilty to any of the offences referenced in the Canadian Offences and Foreign Offences subsections, where Canada considers it necessary to the public interest for reasons which include, but are not limited to:
 - i. the need is one of pressing emergency in which delay would be injurious to the public interest;
 - ii. the Supplier is the only person capable of performing the contract(s) resulting from a bid solicitation against the Supply Arrangement (SA);
 - iii. the Contract(s) resulting from a bid solicitation against the SA are essential to maintain sufficient emergency stocks in order to safeguard against possible shortages; and
 - iv. not issuing the Contract resulting from a bid solicitation against the SA with the Supplier would have a significant adverse impact on the health, national security, safety, security or economic or financial well-being of the people of Canada or the functioning of any portion of the federal public administration;
- b. Canada may only issue a supply arrangement with a Supplier under this subsection where the ineligible Supplier has concluded an Administrative Agreement with the Minister of PWGS, on such terms and conditions that are necessary to safeguard the integrity of the

procurement process and can apply to any procurement. The Administrative Agreement need not be concluded in advance of the solicitation.

02 (2012-03-02) Procurement Business Number

Suppliers are required to have a Procurement Business Number (PBN) before issuance of an SO/SA. Suppliers may register for a PBN on line at [Supplier Registration Information](#). For non-Internet registration, suppliers may contact the InfoLine at 1-800-811-1148 to obtain the telephone number of the nearest Supplier Registration Agent.

03 (2008-05-12) Standard Instructions, Clauses and Conditions

Pursuant to the *Department of Public Works and Government Services Act* (S.C. 1996, c. 16), the instructions, clauses and conditions identified in the RFSO and or RFSA and resulting SO and or SA by number, date and title are incorporated by reference into and form part of the RFSO and or RFSA and resulting SO and or SA as though expressly set out in the RFSO and or RFSA and or resulting SO and or SA.

04 (2008-12-12) Definition of Supplier

"Supplier" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid. It does not include the parent, subsidiaries or other affiliates of the Supplier, or its subcontractors.

05 (2014-09-25) Submission of Bids

1. Canada requires that each bid, at closing date and time or upon request from the Standing Offer Authority and or Supply Arrangement Authority, be signed by the Supplier or by an authorized representative of the Supplier. If a bid is submitted by a joint venture, it must be in accordance with section 16.
2. It is the Supplier's responsibility to:
 - a. obtain clarification of the requirements contained in the RFSO and or RFSA, if necessary, before submitting a bid;
 - b. prepare the bid in accordance with the instructions contained in the RFSO and or RFSA;
 - c. submit by closing date and time a complete bid;
 - d. send the bid only to PWGSC Bid Receiving Unit specified on page 1 of the RFSO and or RFSA or to the address specified in the RFSO and or RFSA. The facsimile number and related instructions for bids transmitted by facsimile are provided in section 08;
 - e. ensure that the Supplier's name, return address, RFSO and or RFSA number, RFSO and or RFSA closing date and time are clearly visible on the envelope or the parcel(s) containing the bid; and,

- f. provide a comprehensible and sufficiently detailed bid, including all requested pricing details, that will permit a complete evaluation in accordance with the criteria set out in the RFSO and or RFSA.
3. Canada will make available Notices of Proposed Procurement (NPP), RFSO's/RFSA's and related documents for download through the Government Electronic Tendering Service (GETS). Canada is not responsible and will not assume any liabilities whatsoever for the information found on websites of third parties. In the event an NPP, RFSO, RFSA or related documentation would be amended, Canada will not be sending notifications. Canada will post all amendments, including significant enquiries received and their replies, using GETS. It is the sole responsibility of the Supplier to regularly consult GETS for the most up-to-date information. Canada will not be liable for any oversight on the Supplier's part nor for notification services offered by a third party.
4. Bids will remain open for acceptance for a period of not less than 60 days from the closing date of the RFSO/RFSA, unless specified otherwise in the RFSO/RFSA. Canada reserves the right to seek an extension of the bid validity period from all responsive suppliers in writing, within a minimum of three days before the end of the bid validity period. If the extension is accepted by all responsive suppliers, Canada will continue with the evaluation of the bids. If the extension is not accepted by all responsive suppliers, Canada will, at its sole discretion, either continue with the evaluation of the bids of those who have accepted the extension or cancel the RFSO/RFSA.
5. Bids and supporting information may be submitted in either English or French.
6. Bids received on or before the stipulated RFSO/RFSA closing date and time will become the property of Canada and will not be returned. All bids will be treated as confidential, subject to the provisions of the *Access to Information Act* (R.S., 1985, c. A-1), and the *Privacy Act* (R.S., 1985, c. P-21).
7. Unless specified otherwise in the RFSO/RFSA, Canada will evaluate only the documentation provided with the bid. Canada will not evaluate information such as references to Web site addresses where additional information can be found, or technical manuals or brochures not submitted with the bid.
8. A bid cannot be assigned or transferred in whole or in part.

06 (2008-05-12) Late Bids

PWGSC will return bids delivered after the stipulated RFSO/RFSA closing date and time, unless they qualify as a delayed bid as described below.

07 (2012-03-02) Delayed Bids

1. A bid delivered to the specified bid receiving unit after the closing date and time but before the SO/SA issuance date may be considered, provided the supplier can prove the delay is due solely to a delay in delivery that can be attributed to the Canada Post Corporation (CPC) (or national equivalent of a foreign country). Purolator Inc. is not considered to be part of CPC for the purposes of delayed bids. The only pieces of evidence relating to a delay in the CPC system that are acceptable to PWGSC are:

- a. CPC cancellation date stamp; or
- b. CPC Priority Courier bill of lading; or
- c. CPC Xpresspost label

that clearly indicates that the bid was mailed before the RFSO/RFSAs closing date.

2. Misrouting, traffic volume, weather disturbances, labour disputes or any other causes for the late delivery of bids are not acceptable reasons for the bid to be accepted by PWGSC.
3. Postage meter imprints, whether imprinted by the Supplier, the CPC or the postal authority outside Canada, are not acceptable as proof of timely mailing.

08 (2012-03-02) Transmission by Facsimile

1. Unless specified otherwise in the RFSO/RFSAs, bids may be submitted by facsimile. The only acceptable facsimile number for responses to RFSOs/RFSAs issued by PWGSC headquarters is 819-997-9776. The facsimile number for responses to RFSOs/RFSAs issued by PWGSC regional offices is identified in the RFSO/RFSAs.
2. For bids transmitted by facsimile, Canada will not be responsible for any failure attributable to the transmission or receipt of the faxed bid including, but not limited to, the following:
 - a. receipt of garbled or incomplete bid;
 - b. availability or condition of the receiving facsimile equipment;
 - c. incompatibility between the sending and receiving equipment;
 - d. delay in transmission or receipt of the bid;
 - e. failure of the Supplier to properly identify the bid;
 - f. illegibility of the bid; or
 - g. security of bid data.
3. A bid transmitted by facsimile will constitute the formal bid of the Supplier and must be submitted in accordance with section 05.

09 (2010-10-07) Customs Clearance

It is the responsibility of the Supplier to allow sufficient time to obtain customs clearance, where required, before the RFSO/RFSAs closing date and time. Delays related to the obtaining of customs clearance cannot be construed as "undue delay in the mail" and will not be accepted as a delayed bid under section 07.

10 (2008-05-12) Legal Capacity

The Supplier must have the legal capacity to contract. If the Supplier is a sole proprietorship, a partnership or a corporate body, the Supplier must provide, if requested by the Standing Offer Authority and/ or the Supply Arrangement Authority, a statement and any requested supporting documentation indicating the laws under which it is registered or incorporated together with the registered or corporate name and place of business. This also applies to suppliers submitting a bid as a joint venture.

11 (2008-12-12) Rights of Canada

Canada reserves the right to:

- a. reject any or all bids received in response to the RFSO/RFSA;
- b. cancel the RFSO/RFSA at any time;
- c. reissue the RFSO/RFSA;
- d. if no responsive bids are received and the requirement is not substantially modified, reissue the RFSO/RFSA by inviting only the suppliers who submitted a bid to resubmit bids within a period designated by Canada; and
- e. issue RFSOs/RFSAs and bids to suppliers who qualify throughout the entire period of the SO and or SA.

12 (2014-09-25) Rejection of Bid

1. Canada may reject a bid where any of the following circumstances are present:
 - a. the Supplier is subject to a Vendor Performance Corrective Measure, under the Vendor Performance Corrective Measure Policy, which renders the Supplier ineligible to submit a bid for the requirement;
 - b. an employee, or subcontractor included as part of the bid, is subject to a Vendor Performance Corrective Measure, under the Vendor Performance Corrective Measure Policy, which would render that employee or subcontractor ineligible to submit a bid for the requirement, or the portion of the requirement the employee or subcontractor is to perform;
 - c. the Supplier is bankrupt or where, for whatever reason, its activities are rendered inoperable for an extended period;
 - d. evidence, satisfactory to Canada, of fraud, bribery, fraudulent misrepresentation or failure to comply with any law protecting individuals against any manner of discrimination, has been received with respect to the Supplier, any of its employees or any subcontractor included as part of the bid;

- e. evidence satisfactory to Canada that based on past conduct or behavior, the Supplier, a subcontractor or a person who is to perform the Work is unsuitable or has conducted himself/herself improperly;
 - f. with respect to current or previous transactions with the Government of Canada:
 - i. Canada has exercised its contractual remedies of suspension or termination for default with respect to a contract with the Supplier, any of its employees or any subcontractor included as part of the bid;
 - ii. Canada determines that the Supplier's performance on other contracts, including the efficiency and workmanship as well as the extent to which the Supplier performed the Work in accordance with contractual clauses and conditions, is sufficiently poor to jeopardize the successful completion of any requirement to be bid on.
2. Where Canada intends to reject a bid pursuant to a provision of subsection 1. (f), the Standing Offer Authority and/ or the Supply Arrangement Authority will so inform the Supplier and provide the Supplier 10 days within which to make representations, before making a final decision on the bid rejection.
3. Canada reserves the right to apply additional scrutiny, in particular, when multiple bids are received in response to a request for SOs/SAs from a single supplier or a joint venture. Canada reserves the right to:
- a. reject any or all of the bids submitted by a single supplier or joint venture if their inclusion in the evaluation has the effect of prejudicing the integrity and fairness of the process, or;
 - b. reject any or all of the bids submitted by a single supplier or joint venture if their inclusion in the procurement process would distort the solicitation evaluation, and would cause a result that would not reasonably have been expected under prevailing market conditions and/or would not provide good value to Canada.

13 (2014-03-01) Communications - Solicitation Period

To ensure the integrity of the competitive RFSO/RFSA process, enquiries and other communications regarding the RFSO/RFSA must be directed only to the Standing Offer Holder and/ or Supply Arrangement Authority identified in the RFSO/RFSA. Failure to comply with this requirement may result in the bid being declared non-responsive.

To ensure consistency and quality of information provided to suppliers, significant enquiries received and their replies will be posted on the Government Electronic Tendering Service (GETS). For further information, refer to subsection 3 of the Submission of Bids section.

14 (2008-05-12) Bid Costs

No payment will be made for costs incurred in the preparation and submission of bid in response to the RFSO/RFSA. Costs associated with preparing and submitting a bid as well as any costs incurred by the Supplier associated with the evaluation of the bid, are the sole responsibility of the Supplier.

15 (2008-12-12) Conduct of Evaluation

1. In conducting its evaluation of the bids, Canada may, but will have no obligation to, do the following:
 - a. seek clarification or verification from suppliers regarding any or all information provided by them with respect to the RFSO/RFSA;
 - b. contact any or all references supplied by suppliers to verify and validate any information submitted by them;
 - c. request, before issuance of any SO/SA, specific information with respect to suppliers' legal status;
 - d. conduct a survey of suppliers' facilities and/or examine their technical, managerial, and financial capabilities to determine if they are adequate to meet the requirements of the RFSO/RFSA;
 - e. verify any information provided by suppliers through independent research, use of any government resources or by contacting third parties;
 - f. interview, at the sole costs of suppliers, any supplier and/or any or all of the resources proposed by suppliers to fulfill the requirement of the RFSO/RFSA.
2. Suppliers will have the number of days specified in the request by the Standing Offer Authority and/ or the Supply Arrangement Authority to comply with any request related to any of the above items. Failure to comply with the request may result in the bid being declared non-responsive.

16 (2012-03-02) Joint Venture

1. A joint venture is an association of two or more parties who combine their money, property, knowledge, expertise or other resources in a single joint business enterprise, sometimes referred as a consortium, to submit a bid together on a requirement. Suppliers who submit a bid as a joint venture must indicate clearly that it is a joint venture and provide the following information:
 - a. the name of each member of the joint venture;
 - b. the Procurement Business Number of each member of the joint venture;

- c. the name of the representative of the joint venture, i.e. the member chosen by the other members to act on their behalf, if applicable;
 - d. the name of the joint venture, if applicable.
2. If the information is not clearly provided in the bid, the Supplier must provide the information on request from the Standing Offer Authority and/ or the Supply Arrangement Authority.
 3. The bid must be signed by all the members of the joint venture unless one member has been appointed to act on behalf of all members of the joint venture. The Standing Offer Authority and/ or the Supply Arrangement Authority may, at any time, require each member of the joint venture to confirm that the representative has been appointed with full authority to act as its representative for the purposes of the RFSO/RFSA and any resulting SO/SA.

17 (2012-03-02) Conflict of Interest - Unfair Advantage

1. In order to protect the integrity of the procurement process, suppliers are advised that Canada may reject a bid in the following circumstances:
 - a. if the Supplier, any of its subcontractors, any of their respective employees or former employees was involved in any manner in the preparation of the RFSO/RFSA or in any situation of conflict of interest or appearance of conflict of interest;
 - b. if the Supplier, any of its subcontractors, any of their respective employees or former employees had access to information related to the RFSO/RFSA that was not available to other suppliers and that would, in Canada's opinion, give or appear to give the Supplier an unfair advantage.
2. The experience acquired by a supplier who is providing or has provided the services described in the RFSO/RFSA (or similar services) will not, in itself, be considered by Canada as conferring an unfair advantage or creating a conflict of interest. This supplier remains however subject to the criteria established above.
3. Where Canada intends to reject a bid under this section, the Standing Offer Authority and/ or Supply Arrangement Authority will inform the Supplier and provide the Supplier an opportunity to make representations before making a final decision. Suppliers who are in doubt about a particular situation should contact the Standing Offer Authority and/ or the Supply Arrangement Authority before the RFSO/RFSA closing date. By submitting a bid, the Supplier represents that it does not consider itself to be in conflict of interest nor to have an unfair advantage. The Supplier acknowledges that it is within Canada's sole discretion to determine whether a conflict of interest, unfair advantage or an appearance of conflict of interest or unfair advantage exists.

18 (2008-12-12) Entire Requirement

The RFSO/RFSA contains all the requirements relating to the request for bids. Any other information or documentation provided to or obtained by a supplier from any source are not relevant. Suppliers should not assume that practices used under previous contracts will continue, unless they are described

in the RFSO/RFSA. Suppliers should also not assume that their existing capabilities meet the requirements of the RFSO/RFSA simply because they have met previous requirements.

19 (2008-12-12) Further Information

1. For further information, suppliers may contact the Standing Offer Authority and/or Supply Arrangement Authority identified in the RFSO/RFSA.
2. For RFSOs/RFSAs issued out of PWGSC headquarters, enquiries concerning receipt of bids may be addressed to the Bid Receiving Unit, Procurement Operational Support Division, telephone 819-956-3370. For RFSAs issued out of PWGSC regional offices, enquiries concerning receipt of offers may be addressed to the Standing Offer Authority and/ or Supply Arrangement Authority identified in the RFSO/RFSA.

**Annex A
Requirement**

FLEXIBLE GRID
HOW TO USE THE FLEXIBLE GRID
CERTIFICATIONS EXAMPLES

1. HUMAN RESOURCES SERVICES STREAM

- 1.1 HUMAN RESOURCES CONSULTANT
- 1.2 ORGANIZATIONAL DESIGN AND CLASSIFICATION CONSULTANT
- 1.3 EMPLOYMENT EQUITY CONSULTANT
- 1.4 EMPLOYEE RELATION CONSULTANT
- 1.5 COMPENSATION CONSULTANT
- 1.6 HR INFORMATION SYSTEM CONSULTANT
- 1.7 LEADERSHIP DEVELOPMENT CONSULTANT
- 1.8 STAFFING CONSULTANT
- 1.9 HR POLICY DEVELOPMENT CONSULTANT
- 1.10 HR ASSISTANT CONSULTANT

2. BUSINESS CONSULTING / CHANGE MANAGEMENT STREAM

- 2.1 BUSINESS ANALYST
- 2.2 BUSINESS CONTINUITY CONSULTANT
- 2.3 BUSINESS CONSULTANT
- 2.4 ORGANIZATION DEVELOPMENT CONSULTANT
- 2.5 BUSINESS PROCESS CONSULTANT
- 2.6 CHANGE MANAGEMENT CONSULTANT
- 2.7 NEEDS ANALYSIS AND RESEARCH CONSULTANT
- 2.8 BUSINESS ARCHITECT
- 2.9 STATISTICAL ANALYST
- 2.10 KNOWLEDGE MANAGEMENT CONSULTANT
- 2.11 INFORMATION/ RECORDS MANAGEMENT/RECORDKEEPING SPECIALIST
- 2.12 EVALUATION SERVICES CONSULTANT
- 2.13 PERFORMANCE MEASUREMENT CONSULTANT
- 2.14 SUBJECT MATTER EXPERT
- 2.15 FACILITATOR CONSULTANT

3. PROJECT MANAGEMENT SERVICES STREAM

- 3.1 PROJECT ADMINISTRATOR
- 3.2 PROJECT MANAGER
- 3.3 PROJECT LEADER /EXECUTIVE
- 3.4 PROJECT PLANNER
- 3.5 QUALITY ASSURANCE / MANAGEMENT SPECIALIST
- 3.6 RISK MANAGEMENT SPECIALIST
- 3.7 PROCUREMENT SPECIALIST
- 3.8 FINANCIAL SPECIALIST
- 3.9 PROJECT MONITOR
- 3.10 TECHNICAL WRITER
- 3.11 COMMUNICATIONS CONSULTANT

4. REAL PROPERTY PROJECT MANAGEMENT SERVICES STREAM

- 4.1 PROJECT ADMINISTRATOR FOR REAL PROPERTY
- 4.2 PROJECT MANAGER FOR REAL PROPERTY
- 4.3 PROJECT LEADER FOR REAL PROPERTY
- 4.4 PROJECT PLANNER FOR REAL PROPERTY
- 4.5 FINANCIAL/COST SPECIALIST FOR REAL PROPERTY
- 4.6 PORTFOLIO PLANNER FOR REAL PROPERTY
- 4.7 CLAIMS ANALYST

**Annex A
Requirement**

5. TECHNICAL, ENGINEERING AND MAINTENANCE SERVICES STREAM

5.1 DRAFTSPERSON / ILLUSTRATOR

5.2 TECHNICIAN

5.3 ENGINEERING GRADUATE

5.4 PROFESSIONAL ENGINEER (P. ENG)

5.5 CLOTHING TECHNOLOGIST

5.6 TEXTILE TECHNOLOGIST

5.7 PERSONAL PROTECTION EQUIPMENT TECHNOLOGIST

5.8 NUCLEAR/BIOLOGICAL/CHEMICAL (NBC) PERSONAL PROTECTION TECHNOLOGIST

5.9 HANDWEAR/KNITTED FOOTWEAR AND ACCESSORIES TECHNOLOGIST

5.10 FOOTWEAR TECHNOLOGIST

5.11 PATTERN DESIGN, DEVELOPMENT, AND SIZING TECHNOLOGIST

5.12 CLOTHING AND PERSONAL PROTECTION EQUIPMENT DESIGN AND PROTOTYPING TECHNOLOGIST

5.13 BADGES/INSIGNIA/CEREMONIAL ACCOUTREMENTS TECHNOLOGIST

5.14 INTEGRATED LOGISTICS SUPPORT (ILS) SPECIALIST

5.15 TECHNICAL CLERK

5.16 LIFE CYCLE MANAGEMENT SPECIALIST

Annex A Requirement

FLEXIBLE GRID

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

Experience

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

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

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

Education

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

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

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

Relevant professional certification

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

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

How to use the Flexible Grid

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

Annex A Requirement

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

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

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

Example

Identified User's requirements:

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

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

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

consultants proposed and points given:

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

Annex A Requirement

CERTIFICATIONS EXAMPLES

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

- Appraisal Institute of Canada
- Canadian Institute of Planners
- Certification in technical writing (TWC 900 or TWC 950)
- Certified Associate in Project Management (CAPM)
- Certified Business Analyst Professional (CBAP)
- Certified Employee Benefit Specialist (CEBS)
- Construction Estimator Certified (CEC)
- Certified Financial Planner (CFP)
- Certified General Accountant (CGA)
- Certified HR Professional (CHRP)
- Certified Information Systems Security Professional (CIISP)
- Certified Management Accountants (CMA)
- Certified Management Consultant (CMC)
- Certified Professional Purchaser (C.P.P.)
- Chartered Accountant (CA)
- Chartered Financial Analyst (CFA)
- Fellow Chartered Financial Practitioner(FChFP)
- International Association of Facilitators Certified Professional Facilitator (IAF-CPF)
- International Personnel Management Association Certified Professional (IPMA-CP)
- International Personnel Management Association Certified Specialist (IPMA-CS)
- ITC2's Experience Certification
- Master Financial Planner (MFP)
- Procurement and Contract Management Program (PCMP)
- Professional Engineer (PEng)
- Real Estate Institute of Canada
- Project Management Professional (PMP)
- Project Management Institute Scheduling Professional (PMI-SP)
- Program Management Professional (PgMP)
- Professional Quantity Surveyor (PQS)
- Planning & Scheduling Professional (PSP)
- PRINCE2 Practitioner
- Registered Architect (e.g. OAA, OAQ)
- Registered Financial Planner Successful completion of the Public Service Commission Appointment Framework Knowledge Test
- Accreditation in Classification in the Federal Public Service Context
- Formal training on the Federal Public Service Executive Classification Standard
- PSC Staffing Certification (issued up to Dec. 2005)
- National Staffing Council Certification (for requirements starting Jan. 2010)
- Certified Professional Facilitator (IAF – CPF)
- Master Facilitator Certification
- Certified Facilitation Specialist (CFS) designation
- DACUM Facilitator Certification from the Canadian Vocational Association
- TOGAF® 9 Certification

OTHER CONSULTANT CATEGORY SPECIFIC CERTIFICATIONS

**Annex A
Requirement**

1. HUMAN RESOURCES SERVICES STREAM

Human Resources Services Stream Flexible Grid

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

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

<u>1.1 HUMAN RESOURCES CONSULTANT</u>
<p>The required services may include, but are not limited to the following:</p> <p>HR Programs and Services can include: human resource planning, recruitment, collective bargaining, training and development, organizational design and classification, pay and benefit administration, staffing and resourcing, performance management, official languages, employment equity and employee assistance programs</p> <ol style="list-style-type: none"> 1. Providing operational HR services; 2. Developing resourcing strategies linked to HR Plans, job marketing strategy and tools; 3. Assisting in redress process, appeals, grievances etc; 4. Providing advice on and/or performing analysis of the HR strategic direction and assisting in the development of HR options, aligning and integrating the HR plans with the strategic direction of the organization's business plan; 5. Participating in the development of potential HR models and assisting in the implementation of HR requirements and a transition plan to meet HR needs; 6. Developing, implementing and providing advice on policies, programs and procedures regarding human resource services and programs; 7. Planning Human Resources in areas such as organizational development, organizational planning and design, human resources utilization, job analysis, performance planning, auditing and evaluating and forecasting; 8. Providing advice on and/or participating in the establishment of processes and HR systems support for human resources programs, services and activities; 9. Providing advice on and/or participating in the development of new programs for employees to retain career mobility; 10. Identifying policy needs/concerns and performing comparative analysis of policies as well as developing policies, procedures, guidelines and Strategies; 11. Planning, developing, implementing and evaluating personnel and employee relations strategies including policies, programs and procedures to address an organization's human resource requirements; 12. Advising managers and employees on the interpretation of compensation and benefit programs and collective

**Annex A
Requirement**

- agreements;
13. Researching, preparing and conducting grievance committees and prepare reports;
 14. Conducting research and analysis and preparing recommendations, reports and/or conducting desk audits;
 15. Leading, participating in the conduct of organizational and central agencies monitoring and audit initiatives;
 16. Negotiating collective agreements on behalf of employers or employees, mediate labour disputes and grievances and provide advice on employee and labour relations;
 17. Planning and administering HR programs;
 18. Hiring and overseeing training of staff;
 19. Coordinating employee performance and appraisal programs;
 20. Conducting reviews, developing implementation strategies;
 21. Develop training and information sessions on HR services;
 22. Providing mentoring, tutoring and coaching assistance on HR services;
 23. Assisting in the development of HR strategies to meet business needs;
 24. Assisting in the development of Integrated Business and Human Resources Plan to meet the needs of the organization;
 25. Developing and monitoring framework, conducting monitoring activities and preparing monitoring reports;
 26. Developing, implementing HR related programs, framework and initiatives;
 27. Evaluating programs and activities and reporting on lessons learned or making recommendations for the future;
 28. Researching or fact findings developing, implementing and tracking service standards, agreements; and
 29. Reviewing and proposing various organizational models.

1.2 ORGANIZATIONAL DESIGN AND CLASSIFICATION CONSULTANT

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

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

**Annex A
Requirement**

- suggesting a recommended course of action;
- 22. Identifying the required modifications to the automated processes;
- 23. Documenting workflow;
- 24. Articulating business requirements;
- 25. Providing advice in defining new requirements and opportunities for applying efficient and effective solutions: identifying and providing preliminary costs of potential options;
- 26. Provide mentoring, coaching assistance, and/or training on classification or organizational design;
- 27. Developing and delivering training;
- 28. Evaluating performance framework, developing performance needs and reporting systems and processes;
- 29. Researching, analyzing data and reporting on activities;
- 30. Carrying out performance monitoring and reporting on activities;
- 31. Developing and updating performance management systems, process and tools;
- 32. Providing advice and/or performing activities related to classification monitoring;
- 33. Researching, developing and implementing generic work descriptions approaches;
- 34. Reviewing, evaluating, new or revised work descriptions;
- 35. Compiling information and preparing reports; and
- 36. Developing, monitoring framework, conducting monitoring activities and preparing monitoring reports.

1.3 EMPLOYMENT EQUITY CONSULTANT

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

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

1.4 EMPLOYEE RELATION CONSULTANT

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

- 1. Directing employee relations function;
- 2. Performing internal audits and taking appropriate action to correct any employee relations issues;
- 3. Managing dispute resolution procedures;

**Annex A
Requirement**

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

1.5 COMPENSATION CONSULTANT

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

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

1.6 HR INFORMATION SYSTEM CONSULTANT

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

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

1. Providing advice on the development and implementation strategies related to Human Resources Information Systems (HRIS, HRMIS, PeopleSoft, SAP);
2. Examining and verifying employee information processed by automated human resources systems;
3. Compiling and analyzing statistical information and preparing system reports related to payroll, recruiting,

E60ZN-15TSPS/C

Annex A

Page 9 of 53

**Annex A
Requirement**

- position classification, compensation, training, equal opportunity employment, or affirmative action utilizing HRIS
4. Providing assistance with HRIS network maintenance by adding or deleting users and retaining system security;
 5. Troubleshooting user technical problems, consulting HRIS IT resources where necessary and providing training;
 6. Managing programs and maintaining human resources information and related records systems;
 7. Developing policies, procedures and guidelines;
 8. Conducting reviews, developing implementation strategies;
 9. Providing mentoring and coaching assistance about HR information system;
 10. Developing and providing training and information sessions about HR information system;
 11. Developing HR Reports and template and tools for managers to simplify access and encourage them to use system;
and
 12. Developing mapping exercise, analysis of needs, implementation.

1.7 LEADERSHIP DEVELOPMENT CONSULTANT

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

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

LEADERSHIP DEVELOPMENT CONSULTANT FLEXIBLE GRID

Levels of Expertise

Senior	Minimum 100 pts
Intermediate	Minimum 80 pts
Junior	Minimum 65 pts

Relevant Education to the Consultant Category

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

Professional Certification

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

Relevant Experience in Consultant Category

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

1.8 STAFFING CONSULTANT

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

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

E60ZN-15TSPS/C

Annex A

Page 10 of 53

**Annex A
Requirement**

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

E60ZN-15TSPS/C

Annex A

Page 11 of 53

**Annex A
Requirement**

- | |
|---|
| <p>32. Advising managers and employees on staffing policies and procedures; and
33. Providing mentoring, tutoring or coaching assistance on staffing.</p> |
|---|

1.9 HR POLICY DEVELOPMENT CONSULTANT

The required services may include, but are not limited to the following:
 HR Policy can include: human resource planning, recruitment, collective bargaining, training and development, organizational design and classification, pay and benefit administration, staffing and resourcing, performance management, official languages, employment equity and employee assistance programs

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

1.10 HR ASSISTANT CONSULTANT

The required services may include, but are not limited to the following:
 HR activities can include: human resource planning, recruitment, collective bargaining, training and development, organizational design and classification, pay and benefit administration, staffing and resourcing, performance management, official languages, employment equity and employee assistance programs.

1. Ensuring the appropriate preparation, completion, distribution and filing of HR documentation;
2. Ensuring the appropriate data entry, and/or the compilation of data and information and the preparation of reports;
3. Responding to human resources inquiries and relaying the inquiry to the appropriate person;
4. Assisting in the development of administrative procedures and tools;
5. Assisting in the coordination of appointments, interviews, testing, scheduling of events and learning sessions etc;
6. Providing administrative support to HR Manager, Advisors or an HR Specialist; and
7. Providing administrative, clerical or coordinating support in the development and/or implementation of HR activities, programs and tools.
8. Executing human resources support activities;
9. Providing assistance in the areas of human resources, or employee communications;
10. Delivering a variety of written tests to candidates and requesting testing as required;
11. Training administrative assistants in client organizations on procedures and automated systems used for completing HR Activities;
12. Providing direct advice, guidance and services to clients for HR services;
13. Maintaining and updating HR systems, keeping hard copies of files, records and correspondence on related current HR activities and helping develop new systems or improving the existing system;
14. Adjusting, modifying and updating HR management methods, practices and procedures; and
15. Providing administrative services to include project and research activities in a given HR sector and the implementation of a wide range of administrative procedures and processes to support the HR programs.

HR ASSISTANT FLEXIBLE GRID		
Levels of Expertise		
	Senior	Minimum 60 pts
	Intermediate	Minimum 50 pts
	Junior	Minimum 30 pts
Relevant Education to the Consultant Category		

**Annex A
Requirement**

College or CEGEP Diploma / Certificate.		25 pts
High School Diploma.		20 pts
Relevant Experience in Consultant Category		
≥1 yr and <2 yrs	12-23 months	10 pts
≥2 yrs and <4 yrs	24-47 months	25 pts
≥4 yrs and <6 yrs	48-71 months	35 pts
≥6 yrs and <8 yrs	72-95 months	40 pts
≥8 yrs and <10 yrs	96-119 months	45 pts
≥10 yrs	120 + months	50 pts

**Annex A
Requirement**

2. BUSINESS CONSULTING / CHANGE MANAGEMENT STREAM

Business Consulting / Change Management Stream Flexible Grid

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

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

2.1 BUSINESS ANALYST

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

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

**Annex A
Requirement**

19. Assessing the organization's capacity/capability to undertake and successfully deliver t an initiative or a change;
20. Consulting stakeholders (individually or by means of facilitating group sessions) to identify comprehensive business requirements;
21. Documenting business requirements for all stakeholders;
22. Providing support in analyzing, evaluating and controlling risks, especially related to requirements;
23. Managing the implementation of an organizational improvement plan to identify, analyze, plan, track and control organizational improvements on a continuous basis; and
24. Performing Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis when producing a business case to determine whether further investment in a project is warranted.

BUSINESS ANALYST CONSULTANT FLEXIBLE GRID

Levels of Expertise

Senior	Minimum 100 pts
Intermediate	Minimum 80 pts
Junior	Minimum 65 pts

Relevant Education to the Consultant Category

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

Professional Certification

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

Relevant Experience in Consultant Category

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

2.2 BUSINESS CONTINUITY CONSULTANT

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

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

2.3 BUSINESS CONSULTANT

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

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

**Annex A
Requirement**

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

2.4 ORGANIZATION DEVELOPMENT CONSULTANT

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

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

2.5 BUSINESS PROCESS CONSULTANT

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

1. Reviewing existing work processes and organizational structure;
2. Analyzing existing business processes, identifying opportunities for process improvements;

**Annex A
Requirement**

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

2.6 CHANGE MANAGEMENT CONSULTANT

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

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

2.7 NEEDS ANALYSIS AND RESEARCH CONSULTANT

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

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

**Annex A
Requirement**

5. Carrying out analysis related to the development of business cases including the collection and analysis of cost data.

2.8 BUSINESS ARCHITECT

- The required services may include, but are not limited to the following:**
1. Developing policies and rules that allow an organization to carry out its mandate and functional responsibilities, and that govern the organization's actual and planned capabilities in terms of data, human resources, communication facilities and management responsibilities;
 2. Conducting an assessment of the project's business architecture, process and performances;
 3. Recommending changes to improve operational performance;
 4. Ensuring consistency and integration with the organization's and government architectures and business strategies;
 5. Evaluating the feasibility of the architecture and technologies related to a business change;
 6. Developing principles of operation and concept of operations;
 7. Identifying risks associated with the architecture and technologies and recommending risk mitigation;
 8. Advising Senior Management on trends and emerging technologies and their impact on the organization's and government architectures and business strategies;
 9. Recommending alternative solutions, methodologies and strategies;
 10. Assisting in the prioritization and assignment of architectural improvements;
 11. Managing the development and implementation of an architectural improvement plan; and
 12. Coaching, mentoring and training the organization on business architecture.

BUSINESS ARCHITECT CONSULTANT FLEXIBLE GRID

Levels of Expertise			
	Senior	Minimum 100 pts	
	Intermediate	Minimum 80 pts	
	Junior	Minimum 65 pts	
Relevant Education to the Consultant Category			
	University (PhD, Graduate, Undergraduate, degree).	35 pts	
	College or CEGEP Diploma / Certificate.	25 pts	
Professional Certification			
	Relevant Professional Certification	15 pts	
Relevant Experience in Consultant Category			
	≥1 yr and <2 yrs	12-23 months	15 pts
	≥2 yrs and <4 yrs	24-47 months	20 pts
	≥4 yrs and <6 yrs	48-71 months	30 pts
	≥6 yrs and <8 yrs	72-95 months	35 pts
	≥8 yrs and <10 yrs	96-119 months	55 pts
	≥10 yrs	120 + months	65 pts

2.9 STATISTICAL ANALYST

- The required services may include, but are not limited to the following:**
1. Reporting results of statistical analyses, including information in the form of graphs, charts, and tables;
 2. Processing large amounts of data for statistical modeling and graphic analysis, using computers;
 3. Identifying relationships and trends in data, as well as any factors that could affect the results of research;
 4. Analyzing and interpreting statistical data in order to identify significant differences in relationships among sources of information;
 5. Preparing estimates and forecasts using statistical techniques;
 6. Preparing data for processing by organizing information, checking for any inaccuracies, and adjusting and weighting the raw data;

**Annex A
Requirement**

7. Evaluating the statistical methods and procedures used to obtain data in order to ensure validity, applicability, efficiency, and accuracy;
8. Evaluating sources of information in order to determine any limitations in terms of reliability or usability;
9. Planning data collection methods for specific projects, and determining the types and sizes of sample groups to be used; and
10. Designing research projects that apply valid scientific techniques and utilizing information obtained from baselines or historical data in order to structure uncompromised and efficient analyses.

2.10 KNOWLEDGE MANAGEMENT CONSULTANT

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

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

2.11 INFORMATION/ RECORDS MANAGEMENT/RECORDKEEPING SPECIALIST

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

1. Collecting, crating, receiving and/or capturing information;
2. Organizing, using, and/or disseminating information;
3. Maintaining, storing and/or preserving information;
4. Disposing of information;
5. Coordinating management of an organization's information-based resources, including its information holdings and investment in technology;
6. Planning, directing and controlling all of the organization's information-based resources to meet corporate goals and to deliver programs and services;
7. Coordinating of information storage requirements and interface with Information Technology;
8. Providing document and records management;
9. Coordinating Access to Information and Privacy Act requirements;
10. Defining produce business requirement document.
11. Conducting subject-specific research in the archival holdings of federal departments and agencies;
12. Producing professional research reports based on detailed research into federal records;
13. Developing, organizing, monitoring, conducting and reporting on sustained archival research projects;

**Annex A
Requirement**

14. Identifying, classifying, archiving, preserving, and destroying records;
15. Responsible for the efficient and systematic control of the creation, receipt, maintenance, use and disposition of records, including the processes for capturing and maintaining evidence of and information about business activities and transactions in the form of records.
16. Managing a library or a library service;
17. Cataloguing, indexing and classifying information audio-visual and electronic documents;
18. Organizing and maintaining “virtual” services;
19. Establishing and implementing metadata standards and guidelines;
20. Analyzing and reporting on the effectiveness of the implementation of information management standards;
21. Identifying and analyzing content management issues and providing recommendations to management for improvement;
22. Delivering research and reference services;
23. Searching online systems and the web to find information; and
24. Delivering library services;
25. Provide advice and guidance in the field of Recordkeeping as relates to Capacity Building, Legacy Records Management and e-Records Sustainability;
26. Provide advice and guidance in the field of Recordkeeping as relates to the implementation of Recordkeeping policy, regulations and legal requirements;
27. Provide assistance in the monitory and evaluation of the Recordkeeping policies and regulations

2.12 EVALUATION SERVICES CONSULTANT

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

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

EVALUATION SERVICES CONSULTANT FLEXIBLE GRID	
Levels of Expertise	
Senior	Minimum 95 pts
Intermediate	Minimum 80 pts
Junior	Minimum 65 pts
Relevant Education to the Consultant Category	
Graduate degree or higher	35 pts
Undergraduate degree	25 pts

**Annex A
Requirement**

Professional Certification			
Relevant Professional Certification			10 pts
Relevant Experience in Consultant Category			
≥2 yrs and <4 yrs	24-47 months		30 pts
≥4 yrs and <6 yrs	48-71 months		35 pts
≥6 yrs and <10 yrs	72-119 months		45 pts
≥10 yrs	120 + months		60 pts

2.13 PERFORMANCE MEASUREMENT CONSULTANT

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

1. Planning and designing performance measurement frameworks in support of departmental Strategic Outcomes and Program Activity Architectures or performance measurement strategies in support of program monitoring and evaluations, including identifying associated performance measures in accordance with Treasury Board policies and Treasury Board Secretariat guidance and directives;
2. Assessing the adequacy of current performance measurement frameworks and performance measures in federal organizations and the capacity of organizations to create and maintain on-going performance measurement systems at the level of the organization as a whole or at the program, initiative or project level;
3. Developing conceptual frameworks, methodological approaches and designs for performance measurement of projects, programs, services, organizations/institutions, policies and initiatives;
4. Developing performance measurement indicators/measures/benchmarks and tools and instruments for project, program, institutional, or policy monitoring, reviews, or on-going assessments;
5. Providing performance measurement advice and support (e.g. support managers to identify, track and report on results throughout the life cycle of projects, programs, services, policies or initiatives), including providing training or information sessions to build capacity within the organization and assist program management with the establishment of an appropriate ongoing performance measurement system;
6. Compiling, analyzing and/or interpreting performance data and preparing performance reports; and
7. Research performance measurement uses and practices in other jurisdictions (includes provincial and international jurisdictions).

PERFORMANCE MEASUREMENT CONSULTANT FLEXIBLE GRID

Levels of Expertise

Senior	Minimum 65 pts
Intermediate	Minimum 55 pts
Junior	Minimum 45 pts

Relevant Education to the Consultant Category

Graduate degree or higher	30 pts
Undergraduate degree	25 pts

Relevant Experience in Consultant Category

≥2 yrs and <4 yrs	24-47 months	25 pts
≥4 yrs and <6 yrs	48-71 months	30 pts
≥6 yrs and <10 yrs	72-119 months	35 pts
≥10 yrs	120 + months	40 pts

2.14 SUBJECT MATTER EXPERT

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

Possible subject matter areas of expertise include but are not limited to : Social sciences; General government

Annex A Requirement

services; International affairs; Immigration; Defence; Industrial, regional, and scientific-technological support; Economic development; Environmental and resource-base; Security and public safety; Cultural issues (including multiculturalism); Transportation; Justice and legal; International Policy; International Trade and Commerce; Governance and Corporate Operations; Treasury Operations; and Taxation and Tax Policy.

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

1. Providing orientation on their field of expertise to a range of target groups (e.g. program managers, evaluators, corporate planners) including details on key issues in the field and details on best practices in terms of performance measurement and evaluation in those fields;
2. Advising on the design of new or adequacy of existing a) performance measurement frameworks in support of departmental Strategic Outcomes and Program Activity Architectures or b) performance measurement strategies in support of program monitoring and evaluation, including identifying appropriate performance measures and related technical elements (e.g. performance metrics and targets, data sources, and frequencies for data collection) in accordance with Treasury Board policies and Treasury Board Secretariat guidance and directives;
3. Advising on the capacities, skills and resources needed in federal organizations to create, implement and maintain on-going performance measurement systems at the level of the organization as a whole or at the program, initiative or project level;
4. Advising on conceptual frameworks, methodological approaches and designs for performance measurement of and evaluation of projects, programs, services, organizations/institutions, policies and initiatives in those fields;
5. Providing field-specific performance measurement advice (e.g. support managers to identify, track and report on results throughout the life cycle of projects, programs, services, policies or initiatives), including providing training or information sessions to build capacity within organization and assist program management with the collection and interpretation of performance measurement data;
6. Analyzing and/or interpreting performance data and preparing performance reports;
7. Researching field-specific performance measurement uses and practices in other jurisdictions (includes provincial and international jurisdictions);
8. Conducting comparative analysis and advising on best practices, including benchmarking performance, international comparisons and case studies;
9. Providing subject-matter advice to assist in the:
 - Assessment of the readiness of a policy, program or initiative to be evaluated;
 - Scoping and planning of specific evaluations or related studies of individual programs, policies or initiatives;
 - Preparation of logic models, program theories, literature reviews or assessment tools;
 - Constructing of work plans, including evaluation planning reports or frameworks and associated methodologies;
 - Developing, testing and implementing of evaluation methods and data collection tools;
 - Collection and analysis of relevant data (including socio-economic and statistical);
 - Assessment of relevance and performance, including impacts, efficiency and cost-effectiveness of programs, policies or initiatives;
 - Assessment of program governance and management (including assessing risk management and controls, decision-making, planning, development and implementation, transparency and accountability);
 - Developing evaluation reports containing findings, conclusions and recommendations, and undertake report validation and consultations where appropriate and requested;
 - Conducting and writing of synthesis or meta-evaluations;
 - Compilation, analysis and dissemination of findings, lessons learned and best practices;
 - Briefing of program and senior management on major results and findings, including preparation of presentations;
 - Development of other materials, documents, tools and instruments related to the work; and
 - Review of the components of evaluations such as primary and secondary data collection activities, surveys, special studies, literature or document reviews, applied statistical analysis and the development of background or analytical discussion papers on program theory and/or alternatives.
10. Validating evaluation approaches, methodologies, findings, conclusions and recommendations, using methods

**Annex A
Requirement**

- such as (but not limited to) validation from a technical expert standpoint;
11. Participating on peer review or similar panels for evaluations or act as an third- party reviewer of draft evaluation products;
 12. Advising on sensitivities in their specific fields (e.g. on working with groups of ‘at-risk’ stakeholders) and issues related to ethics and values related to performance measurement and evaluation; and
 13. Facilitating connection to other key experts in the field as required for performance measurement or evaluation purposes.

SUBJECT MATTER EXPERT FLEXIBLE GRID

Levels of Expertise

Senior	Minimum 75 pts
Intermediate	Minimum 65 pts
Junior	Minimum 55 pts

Relevant Education to the Consultant Category

Graduate degree or higher	35 pts
Undergraduate degree	25 pts

Relevant Experience in Consultant Category

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



2.15 FACILITATOR CONSULTANT

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

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

**Annex A
Requirement**

17. Working with different levels of hierarchy within an Organization on a national level

FACILITAOR FLEXIBLE GRID			
Levels of Expertise			
	Level 3 (Senior)	Minimum 95 pts	
	Level 2 (Intermediate)	Minimum 70 pts	
	Level 1 (Junior)	Minimum 50 pts	
Relevant Education to the Consultant Category			
	University	30 pts	
	College or CEGEP Diploma / Certificate.	25 pts	
	Formalized Training (examples of formalized training but not limited to, Recognized Mediation Certifications, CTDP Certified Training and Development Professional, Training Certifications from accredited Institutions, ANSI - Association for Challenge Course Technology, Certified Online Facilitation)	20 pts	
	Secondary School	15 pts	
Professional Certification			
	Relevant Professional Certification	10 pts	
Relevant Experience in Consultant Category : Range of years is based on a minimum of 3 completed facilitation events within one calendar year			
	≥1 yr and <2 yrs	12-23 months	10 pts
	≥2 yrs and <4 yrs	24-47 months	20 pts
	≥4 yrs and <6 yrs	48-71 months	25 pts
	≥6 yrs and <8 yrs	72-95 months	40 pts
	≥8 yrs and <10 yrs	96-119 months	55 pts
	≥10 yrs and <15 yrs	120-179 months	70 pts
	≥15 yrs	180+ months	80 pts

**Annex A
Requirement**

3. PROJECT MANAGEMENT SERVICES STREAM

Project Management Services Stream Flexible Grid

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

PROJECT MANAGEMENT SERVICES STREAM FLEXIBLE GRID		
Levels of Expertise		
	Senior	Minimum 95 pts
	Intermediate	Minimum 70 pts
	Junior	Minimum 50 pts
Relevant Education to the Consultant Category		
	University (PhD, Graduate, Undergraduate, degree).	35 pts
	College or CEGEP Diploma / Certificate.	25 pts
Professional Certification		
	Relevant Professional Certification	15 pts
Relevant Experience in Consultant Category		
	≥1 yr and <2yrs	10 pts
	≥2 yrs and <4yrs	20 pts
	≥4 yrs and <6yrs	25 pts
	≥6 yrs and <8 yrs	35 pts
	≥8 yrs and <10 yrs	50 pts
	≥10 yrs	60 pts

3.1 PROJECT ADMINISTRATOR

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

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

PROJECT ADMINISTRATOR CONSULTANT FLEXIBLE GRID

Levels of Expertise	
Senior	Minimum 90 pts

**Annex A
Requirement**

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

3.2 PROJECT MANAGER

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

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

**Annex A
Requirement**

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

3.3 PROJECT LEADER /EXECUTIVE

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

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

**Annex A
Requirement**

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

<u>3.4 PROJECT PLANNER</u>			
The required services may include, but are not limited to the following:			
	<ol style="list-style-type: none"> 1. Developing and maintaining project schedules, documentation and a Master Schedule of all projects and resources if more than one project; 2. Tracking the progress of the project including cost and schedule controls; 3. Documenting issues and resolutions related to the project scheduler; 4. Communicating verbally and in writing with the Project Manager and if necessary with stakeholders to input modifications to the project schedule; 5. Communicating with the Project Manager and if necessary with stakeholders regarding project status and deliverables; 6. Informing management of Project status and direction; 7. Contributing to the development and management of process and procedures used in Operations; and 8. Documenting and managing project and financial records as appropriate. 		
PROJECT PLANNER FLEXIBLE GRID			
Levels of Expertise			
		Senior	Minimum 90 pts
		Intermediate	Minimum 70 pts
		Junior	Minimum 55 pts
Relevant Education to the Consultant Category			
		College or CEGEP Diploma / Certificate.	30 pts
		High School Diploma.	20 pts
Professional Certification			
		Relevant Professional Certification	15 pts
Relevant Experience in Consultant Category			
	≥1 yr and <2 yrs	12-23 months	10 pts
	≥2 yrs and <4 yrs	24-47 months	20 pts
	≥4 yrs and <6 yrs	48-71 months	25 pts
	≥6 yrs and <8 yrs	72-95 months	35 pts
	≥8 yrs and <10 yrs	96-119 months	50 pts
	≥10 yrs	120 + months	60 pts

**Annex A
Requirement**

3.5 QUALITY ASSURANCE / MANAGEMENT SPECIALIST

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

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

3.6 RISK MANAGEMENT SPECIALIST

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

1. Conducting risk assessments and evaluating potential risk and losses;
2. Identifying project and procurement risks;
3. Reviewing and auditing claims;
4. Recommending alternative solutions, methodologies and strategies for risk mitigation and management;
5. Assisting in prioritization and assignment of risks;
6. Assisting in the development and/or implementation of Risk Management Plans;
7. Developing and managing the implementation of Risk Management Plans (safety programs) to identify, analyze, plan, track, evaluate and control project risks on a continuous basis throughout the project life cycle;
8. Coaching, mentoring and training project teams in risk mitigation techniques;
9. Developing and implementing business continuity plans;
10. Developing crisis and emergency communication and/or management planning strategies;
11. Reviewing the organization's insurance and risk management programs and making recommendations regarding coverage improvements, administration, loss control and financing mechanisms;
12. Providing leadership and support to the design, implementation and evaluation of clients products/services performance measures, risk management and risk mitigation strategies;
13. Documenting process improvements;
14. Preparing reports for internal or external publication (Corporate Services, Policy, Communications);
15. Liaising with and interviewing stakeholders, as required, to obtain, clarify and exchange information, in-order to co-ordinate and manage the Risk Assessment Process;

**Annex A
Requirement**

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

3.7 PROCUREMENT SPECIALIST

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

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

PROCUREMENT SPECIALIST FLEXIBLE GRID

Levels of Expertise

**Annex A
Requirement**

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

3.8 FINANCIAL SPECIALIST

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

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

3.9 PROJECT MONITOR

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

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

**Annex A
Requirement**

customer stakeholders on matters related to the project;			
7. Performing a liaison role amongst all project management, executives and customer stakeholders;			
8. Preparing monthly, quarterly, yearly financial and project reports and other project monitoring reports to management and executives; and			
9. Preparing annual reports, project progress reports, results achieved reports, lesson learned documentation and recommendations for improvement documentation at the executive level.			
PROJECT MONITOR CONSULTANT FLEXIBLE GRID			
Levels of Expertise			
	Senior	Minimum 60 pts	
	Intermediate	Minimum 50 pts	
	Junior	Minimum 30 pts	
Relevant Education to the Consultant Category			
	College or CEGEP Diploma / Certificate.	25 pts	
	High School Diploma.	20 pts	
Relevant Experience in Consultant Category			
	≥1 yr and <2 yrs	12-23 months	10 pts
	≥2 yrs and <4 yrs	24-47 months	25 pts
	≥4 yrs and <6 yrs	48-71 months	35 pts
	≥6 yrs and <8 yrs	72-95 months	40 pts
	≥8 yrs and <10 yrs	96-119 months	45 pts
	≥10 yrs	120 + months	50 pts

3.10 TECHNICAL WRITER

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

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

3.11 COMMUNICATIONS CONSULTANT

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

1. Planning, researching, modifying, assisting, writing and/or reviewing memos, scripts, plays, essays, speeches, manuals and other non-journalistic articles with conformance to established standards;
2. Developing and implementing strategic communication plans in geographically dispersed organizations going through an organizational transformation (change management);
3. Providing communications consultation advice to support strategic communications initiatives and strategies;
4. Creating communications support materials;
5. Developing and implementing creative communication and information products using a variety of tools, techniques and media and selecting an appropriate medium to convey information, ideas, and results;

**Annex A
Requirement**

6. Developing and implementing communication strategies and plans;
7. Expressing and exchanging information in a clear and concise manner;
8. Ensuring information is communicated to the appropriate people in a timely manner;
9. Preparing reports for specific purposes using clear, communicative, and professional language (*e.g., audit reports, management letters, consulting reports, financial reports*);
10. Ensuring communications are clearly understood by encouraging and listening to feedback both internally and externally in the organization;
11. Structuring external communications to project an appropriate corporate image;
12. Ensuring confidentiality with respect to organizational or client information and data.
13. Determine target audiences in order to better develop messages;
14. Identify and determine communications impediments and barriers;
15. ; Provide advice on matters relating to policy/program development approaches or options and communications planning alternatives (internal or external)
16. Researching, developing and implementing communications strategies involving social media and related content (ie. blogs, microblogs, wikis, crowdsourcing, content communities, social networks, etc);
17. Provide support and assist communicators in using social media channels to complement traditional channels.
18. Providing suggestions on cost-cutting measures in the communications process;

**Annex A
Requirement**

4. REAL PROPERTY PROJECT MANAGEMENT SERVICES STREAM

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

Real Property Project Management Services Stream Flexible Grid

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

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

4.1 PROJECT ADMINISTRATOR FOR REAL PROPERTY

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

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

**Annex A
Requirement**

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

4.2 PROJECT MANAGER FOR REAL PROPERTY
The required services may include, but are not limited to the following:
<p>Part A:</p> <ol style="list-style-type: none"> 1. Developing project scope, requirement documents, statement of work, participating in client discussions, analysis of functional and operational requirements of the client; 2. Preparation of project approval documents (e.g. business cases, feasibility studies, Treasury Board submissions) required for funding or project approval; 3. Planning and coordinating the activities of project personnel, contractors or other support providers, including the preparation of preliminary time schedules for project design and implementation; and 4. Managing architectural/engineering and associated specialists teams, reviewing project costs and resolving variances with predetermined budgets by recommending action and resolving conflicts. <p>Part B:</p> <ol style="list-style-type: none"> 5. Planning, directing and coordinating a project management office and its activities within time and cost parameters; 6. Preparing formal work breakdown structure and compliance charts; 7. Producing draft plans and sections for incorporation into Project Plans; 8. Contributing to the organization's strategic and business planning initiatives (e.g., identifying strategic goals and implementing initiatives to achieve them (such as through policy development, standards development and program review); 9. Recognizing and taking action on opportunities to combine professional resources through partnering

**Annex A
Requirement**

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

PROJECT MANAGER FOR REAL PROPERTY FLEXIBLE GRID

Levels of Expertise

Senior	Minimum 100 pts
Intermediate	Minimum 80 pts
Junior	Minimum 65 pts

Relevant Education to the Consultant Category

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

Professional Certification

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

Relevant Experience in Consultant Category

E60ZN-15TSPS/C

Annex A

Page 36 of 53

**Annex A
Requirement**

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

4.3 PROJECT LEADER FOR REAL PROPERTY

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

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

PROJECT LEADER FOR REAL PROPERTY FLEXIBLE GRID

Levels of Expertise

**Annex A
Requirement**

Senior	Minimum 100 pts	
Intermediate	Minimum 80 pts	
Junior	Minimum 65 pts	
Relevant Education to the Consultant Category		
University (PhD, Graduate, Undergraduate, degree).	35 pts	
College or CEGEP Diploma / Certificate.	25 pts	
Professional Certification		
Relevant Professional Certification	15 pts	
Relevant Experience in Consultant Category		
≥1 yr and <2 yrs	12-23 months	10 pts
≥2 yrs and <4 yrs	24-47 months	20 pts
≥4 yrs and <6 yrs	48-71 months	30 pts
≥6 yrs and <8 yrs	72-95 months	35 pts
≥8 yrs and <10 yrs	96-119 months	55 pts
≥10 yrs	120 + months	65 pts

4.4 PROJECT PLANNER FOR REAL PROPERTY

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

Part A:

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

Part B:

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

4.5 FINANCIAL/COST SPECIALIST FOR REAL PROPERTY

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

Part A:

1. Preparing a cost and cash flow estimate (eg., identifying the resources, levels of effort and related costs) required for the project;
2. Forecasting costs for specific activities such as: direct project costs, project support overhead, corporate or administrative overhead, costs of products and services, leasing costs;

**Annex A
Requirement**

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

Part B:

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

FINANCIAL/COST SPECIALIST FOR REAL PROPOERTY FLEXIBLE GRID			
Levels of Expertise			
	Senior		Minimum 100 pts
	Intermediate		Minimum 80 pts
	Junior		Minimum 65 pts
Relevant Education to the Consultant Category			
	University (PhD, Graduate, Undergraduate, degree).		35 pts
	College or CEGEP Diploma / Certificate.		25 pts
Professional Certification			
	Relevant Professional Certification		20 pts
Relevant Experience in Consultant Category			
	≥1 yr and <2 yrs	12-23 months	10 pts
	≥2 yrs and <4 yrs	24-47 months	20 pts
	≥4 yrs and <6 yrs	48-71 months	30 pts

**Annex A
Requirement**

≥6 yrs and <8 yrs	72-95 months	45 pts
≥8 yrs and <10 yrs	96-119 months	55 pts
≥10 yrs	120 + months	65 pts

4.6 PORTFOLIO PLANNER FOR REAL PROPERTY

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

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

PORTFOLIO PLANNER FOR REAL PROPERTY FLEXIBLE GRID

Levels of Expertise

Senior	Minimum 100 pts
Intermediate	Minimum 80 pts
Junior	Minimum 65 pts

Relevant Education to the Consultant Category

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

Professional Certification

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

Relevant Experience in Consultant Category

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

4.7 CLAIMS ANALYST

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

1. Reviewing and analyzing project background data and reports with respect to contract issues, i.e. claims, change

**Annex A
Requirement**

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

**Annex A
Requirement**

5. TECHNICAL, ENGINEERING AND MAINTENANCE SERVICES STREAM

Technical, Engineering and Maintenance Services Stream Flexible Grid

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

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

<u>5.1 DRAFTSPERSON / ILLUSTRATOR</u>
<p>The required services may include, but are not limited to the following:</p> <ol style="list-style-type: none"> 1. producing engineering drawings; 2. producing data lists; 3. producing illustrated parts breakdown and parts lists; 4. preparing document illustrations; and 5. preparing computer aided design.

<u>5.2 TECHNICIAN</u>
<p>The required services may include, but are not limited to the following:</p> <ol style="list-style-type: none"> 1. performing machinist services such as milling, turning, grinding, and fabrication on manually and/or computer controlled machines; 2. performing metal manipulation and welding services involving oxy-acetylene, MIG, TIG and/or special metal welding techniques; 3. performing vehicle mechanic and/or technician services involved in the servicing and repair of vehicle systems and subsystems; 4. performing electrician and/or electrical technician services associated with the servicing and repair of vehicle and communications systems within the vehicle; 5. performing optical, and/or optronic servicing and repair of vehicle and communications systems within the vehicle;

**Annex A
Requirement**

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

5.3 ENGINEERING GRADUATE

The required services encompass all electronic, electrical, optical, mechanical, structural and materiel systems which may include but are not necessarily limited to the following, while under the supervision of a licensed Professional Engineer:

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

**Annex A
Requirement**

29. preparing and reviewing instructions and procedures regarding the appropriate handling, clean-up, protective clothing and safety measures to deal with hazardous materials. Developing or obtaining specifications such as material Safety Data Sheets for hazardous materials that are new to the project;
30. conducting environmental or hazardous material assessments of equipment and systems. Assessing the toxicological impact of materials. Investigating alternate non-hazardous options;
31. conducting system integration analyses on the organization and processes involved the introduction of and provision of ongoing support to vehicle and (or) communication systems;
32. conducting a detailed derivation of integrated logistic system requirements for vehicle and communication systems within the vehicle and planning for the ongoing support to those systems;
33. planning the conduct of, providing technical guidance to and conducting statistical analysis of reliability, maintainability, availability and dependability (RAMD) tests of vehicle and communication systems within the vehicle;
34. managing the planning, coordination, documentation and engineering efforts connected with the configuration management of vehicle and communication systems within the vehicle;
35. designing, planning, implementing and modifying quality assurance programs within manufacturing, processing or distribution systems;
36. providing human factors engineering (ergonomics) services (physical and cognitive);
37. conducting the human factors engineering process such as planning, analysis, design, test and evaluation, fundamentals and facilities of various environmental systems;
38. conduct reviews of structural designs to ensure compliance with appropriate specifications, standards and guidelines;
39. perform structural engineering analyses in the area of traditional stress analysis, preliminary design, finite element analysis, damage tolerance assessments, loads derivation, structural dynamic response and/or fracture mechanics analysis; and
40. preparing design documentation in support of structural engineering services , including draft stress reports, manufacturing drawings and/or design drawings.

ENGINEERING GRADUATE CATEGORY FLEXIBLE GRID		
Levels of Expertise		
Senior		Minimum 120 pts
Intermediate		Minimum 90 pts
Junior		Minimum 80 pts
Relevant Education to the Consultant Category		
University Program Accredited by Professional Engineers (PhD, Graduate, Undergraduate, degree).		55 pts
Professional Certification		
Relevant Professional Certification		10 pts
Relevant Experience in Consultant Category		
≥1 yr and <2 yrs	12-23 months	10 pts
≥2 yrs and <4 yrs	24-47 months	25 pts
≥4 yrs and <6 yrs	48-71 months	35 pts
≥6 yrs and <8 yrs	72-95 months	45 pts
≥8 yrs and <10 yrs	96-119 months	55 pts
≥10 yrs	120 + months	65 pts

**Annex A
Requirement**

5.4 PROFESSIONAL ENGINEER (P. ENG)

Any consultant proposed for this category must be a licensed Professional Engineer in the applicable jurisdiction.

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

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

**Annex A
Requirement**

<p>systems within the vehicle and planning for the ongoing support to those systems;</p> <p>33. planning the conduct of, providing technical guidance to and conducting statistical analysis of reliability, maintainability, availability and dependability (RAMD) tests of vehicle and communication systems within the vehicle;</p> <p>34. managing the planning, coordination, documentation and engineering efforts connected with the configuration management of vehicle and communication systems within the vehicle;</p> <p>35. designing, planning, implementing and modifying quality assurance programs within manufacturing, processing or distribution systems;</p> <p>36. providing human factors engineering (ergonomics) services (physical and cognitive);</p> <p>37. conducting the human factors engineering process such as planning, analysis, design, test and evaluation, fundamentals and facilities of various environmental systems;</p> <p>38. conduct reviews of structural designs to ensure compliance with appropriate specifications, standards and guidelines;</p> <p>39. perform structural engineering analyses in the area of traditional stress analysis, preliminary design, finite element analysis, damage tolerance assessments ,loads derivation, structural dynamic response and/or fracture mechanics analysis; and</p> <p>40. preparing design documentation in support of structural engineering services , including draft stress reports, manufacturing drawings and/or design drawings.</p> <p>41. Sign-off (stamp) for final approval of technical documentation.</p>
--

PROFESSIONAL ENGINEER (P. ENG) CATEGORY FLEXIBLE GRID			
Levels of Expertise			
	Senior		Minimum 95 pts
	Intermediate		Minimum 65 pts
	Junior		Minimum 55 pts
Relevant Education to the Consultant Category			
	University Program Accredited by Professional Engineers (PhD, Graduate, Undergraduate, degree).		30 pts
Professional Certification			
	Professional Engineer (P. Eng.) License		Mandatory
	Additional Relevant Professional Certification		10 pts
Relevant Experience in Consultant Category			
	≥1 yr and <2 yrs	12-23 months	10 pts
	≥2 yrs and <4 yrs	24-47 months	25 pts
	≥4 yrs and <6 yrs	48-71 months	35 pts
	≥6 yrs and <8 yrs	72-95 months	45 pts
	≥8 yrs and <10 yrs	96-119 months	55 pts
	≥10 yrs	120 + months	65 pts

<u>5.5 CLOTHING TECHNOLOGIST</u>
The required services may include, but are not limited to the following:
<ol style="list-style-type: none"> 1. Preparing new clothing technical specifications, manufacturing data, purchase descriptions, production drawings, sealed samples and revising existing specifications, drawings, and evaluation of existing sealed samples; 2. Supporting the design and development of clothing; 3. Reviewing and analysing vendors and manufacturers clothing samples and testing results for compliance with given specifications and testing standards; 4. Establishing clothing technical databases for materiel and information management; 5. Researching technical data to confirm accuracy and (or) currency and updating specifications, as required on

**Annex A
Requirement**

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

5.6 TEXTILE TECHNOLOGIST

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

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

E60ZN-15TSPS/C

Annex A

Page 47 of 53

**Annex A
Requirement**

16. Evaluating textile against technical specifications;
17. Supporting compliance of environmental regulations regarding use and disposal of textiles; and
18. Researching and monitoring emerging technologies and (or) products and (or) industrial capabilities for textiles.

5.7 PERSONAL PROTECTION EQUIPMENT TECHNOLOGIST

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

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

5.8 NUCLEAR/BIOLOGICAL/CHEMICAL (NBC) PERSONAL PROTECTION TECHNOLOGIST

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

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

**Annex A
Requirement**

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

5.9 Handwear/Knitted Footwear and Accessories Technologist

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

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

E60ZN-15TSPS/C

Annex A

Page 49 of 53

**Annex A
Requirement**

- through literature searches and in consultation with industry and technical experts;
12. Evaluating prototypes and commercial products to determine suitability;
 13. Support preparation of plans for development and (or) assessment of new requirements or items including laboratory, engineering, and field trial protocols;
 14. Evaluating handwear/knitted footwear and accessories against technical specifications;
 15. Supporting compliance of environmental regulations regarding use and disposal of handwear/knitted footwear and accessories; and
 16. Researching and monitoring emerging technologies and (or) products and (or) industrial capabilities for handwear/knitted footwear and accessories.

5.10 FOOTWEAR TECHNOLOGIST

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

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

5.11 PATTERN DESIGN, DEVELOPMENT, AND SIZING TECHNOLOGIST

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

1. Creating and inputting clothing and personal protection equipment new patterns/drawings and revising existing patterns and drawings in the apparel Computer Aided Design (CAD) system;
2. Researching technical data to confirm accuracy and (or) currency and updating clothing and personal protection equipment pattern drawings as required;

**Annex A
Requirement**

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

5.12 CLOTHING AND PERSONAL PROTECTION EQUIPMENT DESIGN AND PROTOTYPING TECHNOLOGIST

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

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

**Annex A
Requirement**

5.13 BADGES/INSIGNIA/CEREMONIAL ACCOUTREMENTS TECHNOLOGIST

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

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

5.14 INTEGRATED LOGISTICS SUPPORT (ILS) SPECIALIST

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

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

**Annex A
Requirement**

5.15 TECHNICAL CLERK

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

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

5.16 LIFE CYCLE MANAGEMENT SPECIALIST

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

1. conducting engineering studies and analysis to provide technical solutions to stated technical/logistic or operational requirements/problems including preparation of Engineering Changes (ECs);
2. defining standards and criteria related to equipment or systems maintenance;
3. preparing, modifying or updating specifications and drawings;
4. converting specifications and drawings to current standards or electronic formats;
5. preparing, modifying or updating Technical Instructions and Orders;
6. evaluating existing systems;
7. performing configuration management;
8. performing analysis of maintenance, repair and overhaul data;
9. investigating Unsatisfactory Condition Reports (UCRs) and Technical Failure Reports (TFRs);
10. preparing technical statements of requirement, draft specifications and purchase descriptions;
11. preparing data for initial provisioning and repair parts scaling;
12. reviewing the design, development, manufacture, installation and testing of prototype modifications;
13. preparing repair procedures, maintenance schedules and technical data;
14. preparing life-cycle cost estimates;
15. preparing support cost option analysis for systems and equipment;
16. planning, developing, implementing and administrating a data management system;
17. performing independent verification and validation services for equipment engineering projects;
18. providing studies and recommendations on application software development standards, methodologies and tools appropriate for the development and maintenance of related software systems;
19. reviewing Repairable Arising Control sheets (RAC) for technical content and making recommendations;
20. reviewing and updating material/equipment specifications; and
21. reviewing disposal certificates, making appropriate recommendations, updating maintenance handbooks, parts list and operating manuals.

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

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

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

Note to Bidder: It is mandatory to have a minimum security clearance of DOS Reliability prior to issuance of a TSPS Standing Offer/Supply Arrangement. Should your company require sponsorship at the minimum DOS Reliability level, it is suggested suppliers send an email request to the TSPS general email account at SPTS.TSPS@tpsgc-pwgsc.gc.ca as soon as possible.



General Instructions of Quarterly Usage Report

Introduction

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

Response Due Date

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

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

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

Information to be Reported

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

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

Completing the report

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

Currency

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

Changing the Format

Suppliers must not modify the format of this report. Should you have any suggestions about the format, please forward them by e-mail to:

Learning Services: SPTS.TSPS@tpsgc-pwgsc.gc.ca

Returning the Completed Report

Please e-mail the completed report to:

Learning Services: SPTS.TSPS@tpsgc-pwgsc.gc.ca

Confidentiality

GC will keep your response confidential.

Questions

Should you need further clarification, please forward your questions by e-mail to the following address (do not forget to include your name and phone number):

Learning Services: SPTS.TSPS@tpsgc-pwgsc.gc.ca

Instructions on Completing the Report Form

1) Completion of Organization Profile Sheet

- a) Suppliers must, for each Standing Offer or Supply Arrangement or both issued to them, select their legal name from the drop down list. The template will automatically populate each Standing Offer number or Supply Arrangement number or both that the Supplier has.
- b) Suppliers must provide contact information for the Supplier's primary representative and alternate (if applicable) who was responsible for completing the utilization report template.

2) Completion of SO-Information and SA-Information Sheets

Column C - "Standing Offer Number / Supply Arrangement Number"

General Instructions of Quarterly Usage Report

Supplier must select the appropriate Standing Offer or Supply Arrangement number from the drop down list. System will allow copying and pasting into another cell in this column a Standing Offer or Supply Arrangement number that already exists in the list.

Column D – “Method of Supply”

Supplier can only select from the drop down list. System will allow copying and pasting into another cell in this column a Method of Supply that already exists in the list.

Column E – “New Activity”

If a call-up, amendment to a call-up, contract, or contract amendment has been issued against each specific Standing Offer or Supply Arrangement during the period, the Supplier must choose “Yes” from the drop down list.

If a call-up, amendment to a call-up, contract, or contract amendment has not been issued against a specific Standing Offer or Supply Arrangement during the period, the Supplier must choose “None” from the drop down list. The template will automatically populate the remaining cells in the row.

Column F – “Call-up or Amendment” / “Contract or Amendment”

Supplier must select from the drop down list. System will allow copying and pasting into another cell in this column the reference to “Call-up”, “Contract” or “Amendment”.

Column G – “Call-up N^o” / “Contract N^o”

Call-ups or Contracts - Supplier must enter the complete call-up or contract number.

Amendment to a Call-up or Contract - Supplier must enter the complete call-up or contract number that has been amended.

System will allow copying the complete call-up or contract number and pasting into another cell in this column.

Column H – “Amendment N^o”

Supplier must enter the number of the amendment (i.e. “1”, “2”, “3”, etc.).

Column I – “Call-up/Amendment Issuance Date” / “Contract/Amendment Issuance Date”

Date the call-up, contract, amendment to call-up, or amendment to contract was issued must be entered in the form of MM/DD/YYYY.

Column J - “Call-up/Amendment Start Date” / “Contract/Amendment Start Date”

Date the work covered under the call-up or contract is scheduled to start. For amendments to a call-up or contract, the date is the revised starting date for the work. All dates must be entered in the form of MM/DD/YYYY.

Column K - “Call-up/Amendment End Date” / “Contract/Amendment End Date”

Date the work covered under the call-up or contract is scheduled to end. For amendments to a call-up or contract, the date is the revised end date for the work. All dates must be entered in the form of MM/DD/YYYY.

Column L – “Client Department”

Supplier must select the appropriate Department/Agency name from the drop down list. System will allow copying the Client Department name and pasting into another cell in this column.

Column M – “Contact Name”

Supplier must indicate the full name of the contact from the Client Department. System will allow copying the contact name and pasting into another cell in this column.

Column N – “Telephone Number”

Supplier must indicate the full telephone number, including area code, of the contact from the Client Department. System will allow copying the telephone number and pasting into another cell in this column. Telephone numbers must be entered in the form of 5551234567. Entries such as 555-123-4567 will not be accepted.

Column O – “Classification or Consultant Category”

Supplier must select the appropriate Classification or Consultant Category from the drop down list. If the Supplier selects “Multiple Classifications/Categories” from the drop down list, the Supplier must, in the “Comments” column (column R), provide a list of the Classifications/Categories. System will allow copying the Classification/Category and pasting into another cell in this column.

Column P – “Delivery Location”

Supplier must select from the drop down list the appropriate region or Metropolitan Area where the work is being performed. System will allow copying the delivery location and pasting into another cell in this column.

Column Q – “Total Call-up or Amendment Value” / “Total Contract or Amendment Value”

If reporting the value of an amendment to a call-up or contract, Suppliers are to report only the total value of the amendment not the revised call-up or contract value. All values are to be reported in Canadian dollars.

Column R – “Comments”

Suppliers who have selected “Multiple Categories” in column M, for a call-up or contract, must list each of the Consultant Categories in this column. Suppliers may also add additional text in this column as required.



Public Works and
Government Services
Canada

Travaux publics et
Services gouvernementaux
Canada

Organization Profile

(1) Please select your legal name from the drop-down list in the spaces below. If your organization has more than one Standing Offer and/or Supply Arrangement, please indicate all of them.

First SO		First SA	
Legal name:		Legal name:	
SO Number:		SA Number:	

Second SO		Second SA	
Legal name:		Legal name:	
SO Number:		SA Number:	

Third SO		Third SA	
Legal name:		Legal name:	
SO Number:		SA Number:	

Fourth SO		Fourth SA	
Legal name:		Legal name:	
SO Number:		SA Number:	

Fifth SO		Fifth SA	
Legal name:		Legal name:	
SO Number:		SA Number:	

(2) Complete the details of the person who is the primary contact regarding this report:

Contact name:	
Title:	
Email:	
Phone No.:	

(3) If applicable, provide details for the alternate contact regarding this report:

Contact name:	
Title:	
Email:	
Phone No.:	



Annex D - Client Satisfaction Form

SO# or SA#:		Call-up# / Contract# :	
Professional Services <input type="checkbox"/> TBIPS SO <input type="checkbox"/> TSPS SO <input type="checkbox"/> Learning Services SO <input type="checkbox"/> ProServices Method of Supply <input type="checkbox"/> TBIPS SA <input type="checkbox"/> TSPS SA-Task <input type="checkbox"/> Learning Services SA <input type="checkbox"/> Other <input type="checkbox"/> SBIPS SA <input type="checkbox"/> TSPS SA-Solution <input type="checkbox"/> PASS SA Specify _____			
Contractor's Name:		Award Amt:	Award Date:
Contractor's Address:		Amend Amt:	End Date:
		Total Spent:	
		TA Contract: <input type="checkbox"/> Yes <input type="checkbox"/> No	
Description of Work:		Amendment History:	
Client Department:			
Technical Authority		Client Contracting Authority	
Name:		Name:	
Telephone #:		Telephone #:	
e-mail:		e-mail:	
1. How do you rate the Contractor's overall performance? <input type="checkbox"/> below expectations <input type="checkbox"/> as expected <input type="checkbox"/> above expectations			
2. Resources			
a. Did the Contractor provide the resource(s) as identified in their Proposal?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
b. Did the Contractor's resource(s) conduct their work in a professional manner?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
c. Were replacement resources required?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
3. Replacement Resources			
a. Did the Contractor request to replace the resource(s) immediately after Contract Award?		<input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> NA
b. Did the Client request to replace the resource(s)?		<input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> NA
c. Did the Replacement Resources meet the requirements of the RFP or ACF?		<input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> NA
d. How many times were the Contractor's resources replaced?		_____ times	
4. Was the Contract completed within the predetermined:			
a. Time Estimate?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
b. Cost Estimate?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
5. Were the required Reports and Deliverables:			
a. In conformity with the Scope & Tasks of the SOW		<input type="checkbox"/> Yes	<input type="checkbox"/> No
b. Received in the specified time frame?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
6. Contract Management			
a. Did the Contractor deal with performance issues in a timely basis?		<input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> NA
b. Did the Contractor submit the invoices in accordance with the Invoicing Instructions?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
c. Did the Contractor submit the invoices in accordance with the Basis of Payment?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
d. Did the Contractor submit the invoices in accordance with the Method of Payment?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
e. Did the Contractor respond to every TA Request?		<input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> NA
f. Did the Contractor properly respond to every TA Request?		<input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> NA
7. Remarks			

**Annex E SO/SA
Qualified Categories and Rates**

Annex E to Component II (SA): Qualified Categories

Annex E to Component II will be attached to the TSPS Supply Arrangement upon award.

Note: SA refers to the Supply Arrangement, Component II

Annex E to Component III (SO): Qualified Categories and Rates

Annex E to Component III will be attached to the TSPS Standing Offer upon award.

Note: SO refers to the Standing Offer, Component III

**Annex F SA
Insurance Requirements**

1. The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
2. The Commercial General Liability policy must include the following:
 - a. Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
 - b. Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
 - c. Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
 - d. Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
 - e. Cross Liability/Separation of Insured: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
 - f. Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
 - g. Employees and, if applicable, Volunteers must be included as Additional Insured.
 - h. Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
 - i. Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
 - j. Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
 - k. If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
 - l. Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.
 - m. Non-Owned Automobile Liability - Coverage for suits against the Contractor resulting from the use of hired or non-owned vehicles.

- n. Advertising Injury: While not limited to, the endorsement must include coverage piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.
- o. All Risks Tenants Legal Liability - to protect the Contractor for liabilities arising out of its occupancy of leased premises.

Where the Supplier is a JV, for the purposes of the SA and any related documents (including insurance certificates), Canada requires that the JV Contractor identify itself by a single name. Upon request by Canada, a JV Contractor must specify the name of the JV to the Contracting Authority.