

**REQUEST FOR STANDING OFFERS  
PSYCHOLOGICAL PERSONNEL ASSESSMENT SERVICES  
FOR  
THE PUBLIC SERVICE COMMISSION**

**SOLICITATION DATE: JULY 27, 2016**

**CLOSING DATE AND TIME: SEPTEMBER 6 at 2:00 p.m. EASTERN DAYLIGHT SAVINGS TIME**

**Standing Offer Authority:**            **Angèle Fortier-Renaud**  
  
Public Service Commission  
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Public Service Commission  
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(The Standing Offer Authority is responsible for establishing and administering the contract.)

**Proposal Submission:**

Proposals must be sent to the Public Service Commission, at one of the following addresses:

**For delivery by courier services:**

Bid Receiving  
**SOLICITATION NUMBER: D1120-15-9001**  
Public Service Commission c/o SCI  
Procurement Services  
465 Industrial Ave.  
Ottawa, Ontario K1G 0Z1

Attention: Angèle Fortier-Renaud

**For in-person drop-off :**

Bid Receiving  
**SOLICITATION NUMBER: D1120-15-9001**  
Public Service Commission  
Procurement Services  
22 Eddy Street, 12<sup>th</sup> Floor, Room 12017  
Gatineau, Québec K1A 0M7

**IMPORTANT: (In-Person Drop-Off)**

Please call the Standing Offer authority from the  
commissionaire's desk upon arrival.

**It is strongly recommended that the bidder contact the  
Standing Offer Authority or the backup and schedule  
an in-person drop-off. It is solely the bidder's  
responsibility to ensure that the proposal is received at  
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**Proposal to the Public Service Commission  
Bidder Information and Authorization**

<b>Bidder Name and Address:</b>
<b>Legal Status (incorporated, registered, etc.)</b>
<b>GST or HST Registration Number and/or Business Identification Number (The Canada Revenue Agency):</b>

**Name and Title of Person authorized to sign on behalf of Bidder:**

Print Name	Title
Signature	Date

**Central Point of Contact:**

The Bidder has designated the following individual as a central point of contact for all matters pertaining to the proposed contract, including the provision of all information that may be requested:

Name	Title
Telephone	Fax
E-Mail	

**Each proposal must include a copy of this page properly completed and signed. The Bidder's signature indicates acceptance of the terms and conditions set out herein.**

**NOTE: It is the Bidder's responsibility to contact the Standing Offer Authority as soon as possible if there are any changes to the Bidder's contact information. The PSC's main method of communicating with Bidders is via email; therefore, it is the Bidder's responsibility to ensure that they verify their email account for important information during both the solicitation period, and the resulting standing offer period. The PSC is under no obligation to contact the Bidder via any other means (such as phone, fax or mail), and should the Bidder miss important deadlines sent to their email address identified above, it will be at no fault of the PSC (unless the Bidder has previously advised the Standing Offer Authority of a change in their email address).**

## PART 1 - GENERAL INFORMATION

### 1. Summary

This is a Request for Standing Offers (RFSO) for the establishment of **multiple Standing Offers** to satisfy the requirements of the Public Service Commission (PSC) for “**Psychological Personnel Assessment Services**” on an “as and when requested” basis for a period of **two (2) years** commencing on the date of the Standing Offer Authorization, with provisions to extend the period for three (3) additional one-year periods. Any extensions of the Standing Offer period will be done under the same terms and conditions and at the rates or prices specified in the Standing Offer, or at the rates or prices calculated in accordance with the formula specified in the Standing Offer. For the First Option Period, the Second Option Period, and the Third Option Period, the Standing Offer Authority reserves the right to increase the Firm Batch Price proposed by the bidder up to a maximum of two percent (2%) per annum. The PSC will consider entering into Standing Offers with Bidders offering the most acceptable proposals determined in regards to the evaluation factors set out in this RFSO.

Services for Psychological Personnel Assessments in both official languages will be assigned to Stream A (Bilingual Services) on a rotating basis. Services for Psychological Personnel Assessments in English, the PSC will assigned the work to Stream A (Bilingual Services) or Stream B (English Services) on a rotating basis. Services for Psychological Personnel Assessments in French, the PSC will assigned the work to Stream A (Bilingual Services) or Stream C (French Services) on a rotating basis. **To learn more about the method used to award a call-up, please refer to Section 5 – Call-up Procedures of PART 5.**

The number of Standing Offers awarded by stream may change based on the number of compliant bids received; however, the PSC shall award no more than twenty (20) Standing Offers for this specific requirement. If twenty (20) compliant bids are received for Stream A (Bilingual Services), the twenty (20) Standing Offers shall be awarded in this stream and, as a result, none shall be awarded in Stream B (English) or Stream C (French).

**If fewer than twenty (20) compliant bids** are received for Stream A (Bilingual Services), the remaining Standing Offers shall be divided among the compliant bids received for the other two streams (B – English and C – French) based on the lowest price per point method, as described at Section 2 of Part 3, **up to a maximum of ten (10) Requests for Standing Offers for Stream B and ten (10) Requests for Standing Offers for Stream C.**

To learn more, please refer to Section 5 – Basis of Selection of PART 3.

This requirement is subject to the terms of the Agreement on Government Procurement of the World Trade Organization (GPA-WTO), the North-American Free Trade Agreement (NAFTA), the Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Colombia Free Trade Agreement (CCOFTA) and the Agreement on Internal Trade (AIT).

### 2. Security Requirement

There is a security requirement associated with the requirements of the Standing Offer.

Before issuance of a Standing Offer, the following conditions must be met:

- a) The Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in Appendix “D” – Statement of Work, Section 17.0 – Security Requirements - Standing Offer;
- b) The Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.

The PSC will not delay the issuance of any Standing Offer to allow bidders to obtain the required clearance. Security requirements outlined at Section 17.0 of Appendix “D” – Statement of Work must also be satisfied on the day that a Standing Offer is awarded.

### **3. Interpretation**

In this RFSO and any resulting Standing Offer or Call-up, unless the context otherwise requires:

1. "Call-up" means an order issued by the Call-up Authority duly authorized to issue a Call-up against a particular Standing Offer. Issuance of a Call-up to the Bidder constitutes acceptance of its Bid and results in the creation of a contract between Her Majesty the Queen in right of Canada and the Bidder for the goods, services or both described in the Call-up;
2. "Canada", "Crown", "Her Majesty" or "the Government" means Her Majesty the Queen in right of Canada as represented by the Public Service Commission.
3. "Bidder" means the person or entity whose name appears on the signature page of the Standing Offer and who offers to provide goods, services or both to Canada under the Standing Offer;
4. "Standing Offer" means the written offer from the Bidder, the clauses and conditions, these general conditions, Appendixes and any other document specified or referred to as forming part of the Standing Offer;
5. "Standing Offer Authority" means the person designated as such in the Standing Offer, or by notice to the Bidder, to act as the representative of Canada in the management of the Standing Offer.

### **4. Office of the Procurement Ombudsman (OPO)**

The OPO was established by the Government of Canada to provide an independent avenue for suppliers to raise complaints regarding the award of contracts under \$25,000 for goods and under \$100,000 for services. You have the option of raising issues or concerns regarding the solicitation, or the award resulting from it, with the OPO by contacting them by telephone at 1-866-734-5169 or by e-mail at [boa.opo@boa.opo.gc.ca](mailto:boa.opo@boa.opo.gc.ca). You can also obtain more information on the OPO services available to you at their website at [www.opo-boa.gc.ca](http://www.opo-boa.gc.ca).

## PART 2 – BIDDER INSTRUCTIONS

### 1. Standard Instructions, Clauses and Conditions

The attached Appendix “A”- General Conditions, Appendix “B”- Supplementary Conditions, Appendix “C”- Terms of Payment, Appendix “D”- Statement of Work, Appendix “E”- Quality Assurance Monitoring Report, Appendix “F”- General Conditions – Standing Offers – Goods or Services, Appendix “G”- Standard Instructions – Request for Standing Offers – Goods or Services – Competitive Requirements, Appendix “H” – Basis of Payment, Appendix “I” – Security Requirements Check List, Appendix “J” – Role Play Training Exercise, Appendix “K”- Invoice Template, Appendix “L” – Confidentiality and Policy Agreement and Appendix “M” – Resource Information Sheet are hereby incorporated into and form part of this solicitation. **Submission of a bid constitutes acknowledgement that the Bidder has read and agrees to be bound by such instructions.**

All Bidders submitting proposals shall maintain the confidentiality of all information, documents, and material, whether in oral, written, or machine readable form furnished by the PSC and shall not communicate such information, documents or materials to any third party without the prior consent of the PSC.

#### Integrity Provisions

1. The Ineligibility and Suspension Policy (the “Policy”) in effect on the date the Request for Standing Offers (RFSO) is issued, and all related Directives in effect on that date, are incorporated by reference into, and form a binding part of the RFSO. The Offeror must comply with the Policy and Directives, which can be found at Ineligibility and Suspension Policy.
2. Under the Policy, charges and convictions of certain offences against a Supplier, its affiliates or first tier subcontractors, and other circumstances, will or may result in a determination by Public Works and Government Services Canada (PWGSC) that the Supplier is ineligible to be issued or is suspended from being issued a standing offer and to enter into a contract with Canada. The list of ineligible and suspended Suppliers is contained in PWGSC’s Integrity Database. The Policy describes how enquiries can be made regarding the ineligibility or suspension of Suppliers.
3. In addition to all other information required in the Request for Standing Offers, the Offeror must provide the following:
  - a. by the time stated in the Policy, all information required by the Policy described under the heading “Information to be Provided when Bidding, Contracting or Entering into a Real Property Agreement”; and
  - b. with its offer, a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first tier subcontractors that, to the best of its knowledge and belief, may be similar to one of the listed offences in the Policy. The list of foreign criminal charges and convictions must be submitted using an Integrity Declaration Form, which can be found at Declaration form for procurement.
4. Subject to subsection 5, by submitting an offer in response to this Request for Standing Offers, the Offeror certifies that:
  - a. it has read and understands the Ineligibility and Suspension Policy;
  - b. it understands that certain domestic and foreign criminal charges and convictions, and other circumstances, as described in the Policy, will or may result in a determination of ineligibility or suspension under the Policy;
  - c. it is aware that Canada may request additional information, certifications, and validations from the Offeror or a third party for purposes of making a determination of ineligibility or suspension;
  - d. it has provided with its offer a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first tier subcontractors that, to the best of its knowledge and belief, may be similar to one of the listed offences in the Policy;

- e. none of the domestic criminal offences, and other circumstances, described in the Policy that will or may result in a determination of ineligibility or suspension, apply to it, its affiliates and its proposed first tier subcontractors; and
  - f. it is not aware of a determination of ineligibility or suspension issued by PWGSC that applies to it.
5. Where an Offeror is unable to provide any of the certifications required by subsection 4, it must submit with its offer a completed Integrity Declaration Form, which can be found at Declaration form for procurement.
  6. Canada will declare non-responsive any offer in respect of which the information requested is incomplete or inaccurate, or in respect of which the information contained in a certification or declaration is found by Canada to be false or misleading in any respect. If Canada establishes after issuance of the Standing Offer that the Offeror provided a false or misleading certification or declaration, Canada may set aside the Standing Offer and terminate for default any resulting contracts. Pursuant to the Policy, Canada may also determine the Offeror to be ineligible for issuance of a standing offer for providing a false or misleading certification or declaration.

## 2. Aboriginal Suppliers - Self-identification

The PSC has made a commitment to increase contracting actions between the federal government and Aboriginal businesses, in accordance with The Procurement Strategy for Aboriginal Business. In order to assist the PSC in reporting contracting activities with Aboriginal businesses, it is important that Aboriginal Bidders identify themselves as such by completing and providing appropriate Certification Requirements which have been developed by the Department of Indigenous and Northern Affairs Canada.

## 3. Submission of Bids

Bidders MUST submit **4 copies** of the **Technical Proposal** and **2 copies** of the **Financial Proposal** to the Public Service Commission (see page 1 for complete address) no later than **September 6, 2016 at 2:00 PM Eastern Daylight Savings Time**. It is the responsibility of the Bidders to ensure that proposals are received at the required address before the closing date and time, and are provided in accordance with Section 3.1 of Part 2 – Bid Preparation Instructions. **Proposals will not be accepted after 2:00 PM Eastern Daylight Savings time and will be returned unopened to the sender.**

Proposals should be concise and should address, but not necessarily be limited to, the evaluation criteria and selection method. Bids will be evaluated solely on their content. Evaluation criteria not addressed will be given a score of zero. It is the responsibility of the Bidder to obtain clarification of the requirements contained, herein, if necessary prior to submitting a bid using the procedure described in Part 2 – Bidder Instruction.

Due to the high risk of technical difficulties and unsecured equipment, electronic transmission of proposals by such means as electronic mail, facsimile, or commercial telex is not considered to be practical and therefore **will not be accepted.**

### **3.1 Bid Preparation Instructions**

The PSC requests that Bidders provide their Bid in separately bound sections and in separate envelopes as follows:

- Section I: Technical Bid (4 hard copies)
- Section II: Financial Bid (2 hard copies)

Prices must appear in the Financial Bid only. No prices must be indicated in any other section of the bid. Non-compliance with this condition (for that reason alone) may result in bid disqualification.

The PSC requests that Bidders follow the format instructions described below in the preparation of their bid.

- a) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- b) use a numbering system that corresponds to that of the Request for Standing Offers;
- c) Include the certifications as a separate section of the Technical Bid.

### **3.2 Section I: Technical Bid**

In their technical bid, Bidders should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

The Technical Proposal shall clearly address the following aspects:

- a) Mandatory Proposal Requirements
- b) Mandatory Technical Requirements
- c) Rated Requirements

The Technical Proposal must demonstrate compliance with all mandatory proposal requirements and must demonstrate how each proposed resource meets the mandatory technical requirements and the rated requirements set out in PART 3 – Evaluation Procedures and Basis of Selection. The Technical Proposal must respond to each of the Mandatory and Rated Requirements demonstrating how the qualifications including experience of the proposed resources satisfy the requirement. As outlined in PART 3 – Evaluation Procedures and Basis of Selection – bidders must use the tables provided in order to provide a structured response. Sufficient details including dates, titles, functions, activities, achievements, degrees, etc. must be provided to demonstrate that the requirement is met. Failure to provide sufficient details may result in a non-compliant proposal.

**Proposals should be structured so that responses for each proposed resource are separate from any other proposed resource.**

Bidders **must** include a curriculum vitae (CV) or resume of a proposed resource to provide a summary of the qualifications and experience of the individual.

1. The bidder may propose one or more individual(s) to provide the services. The evaluation team will evaluate all proposed individuals in accordance with the evaluation procedures described herein.
2. The bidder must provide information indicating how and where he or she acquired the experience described in the technical proposal; otherwise, it will not be included in the evaluation process.
3. To facilitate the evaluation and to ensure that sufficient information is provided to permit a complete evaluation, it is **strongly** suggested that the résumé of each proposed individual be presented using the following format:
  - A. Name of bidder and name of proposed individual.
  - B. Position title or affiliation with bidder.
  - C. Security clearance level of the individual.
  - D. Relevant academic and/or professional qualifications.
  - E. Career summary:
    - a. Individual's detailed employment history;
    - b. Past experience relevant to the evaluation criteria;

- c. Organization(s) where the individual was employed, including:
  - i. Organization name and total workforce (permanent, full-time employees);
  - ii. Positions occupied, including start and end dates (mm-yy);
  - iii. Individual’s hierarchical level in the organization;
  - iv. Reporting structure both below and above the individual’s position
  
- 4. The following form should be used to provide detailed information about Education and Certification and to demonstrate the experience gained with respect to personnel assessment services.

<b>Education and Certification</b>				
	<b>University Diploma or Certificate</b>	<b>Name of the Diploma or Certificate</b>	<b>Institution and Year</b>	<b>Knowledge Acquired</b>
1				
2				
3				

<b>Experience in personnel assessment services</b>				
	<b>Assessment activities</b>	<b>Tool used</b>	<b>Type of Clients</b>	<b>Start and End Dates</b>
1				
2				
3				
<b>Total number of years</b>				

**3.3 Section II: Financial Bid**

Bidders must submit their Financial Bid in accordance with the Appendix “H” - Basis of Payment. The total amount of Taxes is to be shown separately, if applicable.

In the Financial Proposal, bidders must include prices and/or rates for the services to be provided, in Canadian dollars, in compliance with the following pricing basis:

- A. For Canadian-based bidders, prices and/or rates of pay for services must be firm and all-inclusive, as indicated in Appendix “H” – Basis of Payment attached (excluding taxes) where applicable, and inclusive of excise taxes and Canadian customs duties, where applicable, and the deliverables FOB Destination.

Travel and per diem expenses are INCLUDED in the proposed prices and/or rates for all services requested and provided in the National Capital Region. For services requested outside the National Capital Region, travel and per diem expenses must be pre-approved by the Project Authority, and will be paid according to the National Joint Council Travel Directive.

- B. Workplace and Facilities

The services will be rendered in the PPC facilities provided by Canada (mainly in the National Capital Region). The necessary facilities, supplies, and equipment will be provided by the Project Authority. Training and orientation sessions and quality assurance reviews will be carried out in facilities provided by the PSC (mainly in the National Capital Region) and will be conducted at the expense of the bidder. The PSC will not agree to pay travel and per diem expenses incurred by the bidder to attend the sessions and reviews.

- C. The proposed firm all-inclusive prices and/or rates **MUST NOT EXCEED the MAXIMUM all-inclusive** prices and/or rates indicated in Appendix “H” – Basis of Payment attached.
- D. All firm all-inclusive prices and/or rates that are proposed shall be valid for the initial period of the standing offer and for any authorized extension period.
- E. In cases where more than one Resource is proposed, the bidder **MUST PROPOSE** the same firm all inclusive price and/or rate per item for all resources.

**During the bid evaluation period, Bidders may or may not be required to clarify the details included in bids. Information shall be made available to the PSC within three (3) working days of receipt of a request. Information or clarifications submitted after the three (3) working day deadline will not be accepted. The PSC is under no obligation to request clarification(s) from the Bidder; therefore it is in the Bidder’s best interest to include complete, descriptive information in its proposal.**

#### **4. Enquiries – Request for Standing Offers**

All enquiries must be submitted in writing (either by regular mail or electronic mail) to the PSC Standing Offer Authority (identified on page one (1) of the solicitation document) on or before **four (4) calendar days** before the RFSO closing date. All enquiries and other communications with government officials throughout the solicitation period are to be directed **ONLY** to the **Standing Offer Authority (or his or her Backup)** named on page one (1) of the solicitation. Non-compliance with this condition during the solicitation period may (for that reason alone) result in disqualification of bids.

Bidders should reference as accurately as possible the numbered item of the RFSO to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable PSC 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 PSC determines that the enquiry is not of a proprietary nature. PSC may edit the questions or may request that Bidders do so, so that the proprietary nature of the question is eliminated, and the enquiry together with the response can be distributed to all Bidders either through a posting on the Government Electronic Tendering Services (GETS) or through electronic mail. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by PSC.

#### **5. Applicable Laws**

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed by the laws in force in Québec.

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. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidders.

## PART 3 – EVALUATION PROCEDURES AND BASIS OF SELECTION

### 1. Evaluation Procedures

- a) Bids will be assessed in accordance with the entire requirement of the Request for Standing Offers including the technical and financial evaluation criteria.
- b) An evaluation team composed of representatives of the PSC will evaluate the bids.

#### 1.1 Technical Evaluation

The Technical Proposal will be evaluated and rated according to the evaluation criteria presented hereinafter. In the proposal, the bidder must address each of the criteria in question in sufficient detail. Experience listed without supporting data indicating where and how it was acquired will be excluded from the evaluation. Rated criteria not covered in the proposal will be given a score of zero.

Where more than one resource is proposed, the overall rating achieved by each proposed resource shall be added up and divided by the number of resources proposed, which will give the overall rating for the technical part. Proposed resource(s) who did not obtain the specified pass mark will be considered ineligible, and their rating will not be included in calculating the average rating.

#### 1.2 Definitions

The following definitions concern the technical requirements for this request for standing offer:

For the purposes of these definitions, “employed” also means “previously having been employed” and “an employee” or “an Executive” includes “a “previous employee” or “previous Executive”.

- 1.2.1 The term “managerial responsibilities” includes managing projects, operations or deliverables, as well as a budget and human resources.
- 1.2.2 The term “manager” applies to any individual employed by an organization with a workforce of at least 100 employees (permanent, full-time, part-time) who has occupied a management position to which at least **one level of staff** reported and who has been responsible for human and financial resources in the administered sector.
- 1.2.3 The term “executive” applies to any individual employed by an organization with a workforce of at least 300 employees (permanent full-time or part-time) who has occupied a management position to which at least one level of managers (may include a level of employees who have supervisory responsibilities over staff) reported directly or indirectly, and who regularly communicated directly with Senior Executives or the highest levels of management in the organization (e.g., Chief Executive Officer (CEO), Board of Directors) and who has been accountable for human and financial resources in the administered sector.
- 1.2.4 The term “senior executive” applies to any individual employed by an organization with a workforce of at least 300 employees (permanent full time or part-time) who has occupied a management position to which at least one level of executives reported directly, and who regularly communicated directly with the highest levels of management in the organization (e.g., Chief Executive Officer (CEO), Board of Directors) and who has been accountable for human and financial resources in the administered sector OR who has occupied a position that is the highest level of management in the organization (e.g. Chief Executive Officer (CEO), Board of Directors, etc.).
- 1.2.5 The term “organization” includes companies, corporations, businesses, Government of Canada or provincial, municipal, or territorial departments, agencies, Crown Corporations, special operating agencies, government agencies and including but not limited to Business Centers, Sections, Units, Divisions, Directorates and Branches.
- 1.2.6 “Employed” does not count acting appointments toward the experience required for mandatory requirements.

- 1.2.7 A “year” means 12 consecutive or cumulative months, as specified, for the purposes of mandatory requirements.
- 1.2.8 An “Assessment Centre” is a standardized evaluation of competencies and behaviours based on multiple exercises (e.g., simulations and role plays). In an assessment centre, multiple assessors are used to observe candidates’ behaviours and performance. Assessors’ judgements of candidate’s performance are pooled during an integration meeting using a consensus approach and/or a statistical integration process.
- 1.2.9 An “assessment module” is one or more individuals to be assessed concurrently with the same assessment centre. The number of individuals assessed per module varies depending on the assessment centre used.

### **1.3 Evaluation Process**

**The evaluation will be conducted in four stages:**

#### Stage 1

Proposals will be evaluated to ensure compliance with the mandatory requirements (MR1 to MR6) outlined in Table 2.1- Mandatory Requirements of Part 3.

Once a proposal is considered compliant, it will be evaluated individually and independently in stages 2, 3, and 4.

#### Stage 2

The responses for each of the proposed resources will be evaluated to determine whether they meet mandatory requirements MR7. If they do not, the proposed resource(s) in question will not be considered further. The rejection of one or more proposed resource will not affect the other resource(s) proposed by the bidder.

#### Stage 3

The responses for each Rated Requirement (R1 to R3) for each proposed resource will be evaluated and points awarded. Proposed resources who fail to obtain 5 points for Technical Criterion R1 “**Education**” and 4 points for Technical Criterion R2 “**Experience in providing Personnel Assessment Services**” will not be considered further.

#### Stage 4

The point total for the technical component (sum of points received for the point-rated technical criteria R1 to R3) for each proposed resource deemed compliant shall be calculated. The technical score of the bid shall be based on the point average awarded to each proposed resource deemed compliant with the technical component.

Bidders are reminded that they must respond to each Mandatory and Rated Requirement sufficiently to demonstrate how the requirements are met. Requirements that are not addressed will not be awarded points. Dates, position titles, functions, organizations must be specified and described in sufficient detail.

To demonstrate the compliance of the resources, all bids shall be evaluated on the basis of the mandatory and rated requirements identified in Tables 2.1 and 3.1. Bids that do not meet ALL mandatory criteria shall be deemed ineligible and shall not be considered, and the proposed resources shall not be evaluated

**The PSC will award up to twenty (20) Standing Offers for the National Capital Region (NCR).**

A resource **MAY NOT** be proposed for more than one stream. The Bidder should clearly indicate the Stream of service in which it is bidding **on the first page of their proposal**. As indicated under section 12.0 a) of Appendix D, a proposed resource for Stream A (bilingual) who passes the Role play training exercise in the two official languages will be considered for work in Stream A under the Standing Offer. However, if a proposed resource for Stream A (bilingual) passes the Role play training exercise in one of the two official languages, but does not pass the Role play training exercise in the other official language, they will be considered for work under the Standing Offer for the Stream for which they passed the Role play training exercise, Stream B (English) or Stream C (French).

The available streams under this standing offer are as follows:

- Stream A: Psychological Personnel Assessment – Bilingual Services
- Stream B: Psychological Personnel Assessment – English Services
- Stream C: Psychological Personnel Assessment – French Services

**2. Mandatory Requirements for Psychological Personnel Assessment Services:**

All bids will be evaluated against the following Mandatory Requirements. Proposals that do not meet ALL of the following Mandatory Requirements will be deemed non-compliant, will not be given further consideration, and the proposed resources will not be evaluated.

**Table 2.1 – Mandatory Requirements**

<u>Item #</u>	<u>Mandatory Requirement</u>	<b>Cross-Reference to Proposal</b> <i>(Please indicate section and page # as appropriate)</i>	<u>Met / Not Met</u> <i>(Column for PSC use only)</i>
MR1	<p>The Bidder <b>MUST</b> submit with its technical proposal a completed and signed “<b>Proposal to the Public Service Commission Bidder Information and Authorization</b>” form as provided on page 4 of this solicitation document. By signing, the Bidder agrees to the terms and conditions established herein.</p> <p><i>Bidders who do not submit the “Proposal to the Public Service Commission Bidder Information and Authorization” form with their proposals will have 72 hours (three business days) to provide it. If the copies are not provided within the 72 hours, the proposal will be deemed non-compliant.</i></p>		
MR2	<p>The Bidder <b>MUST</b> submit with its technical proposal, completed and signed copies of all certification clauses provided in <b>PART 4 - CERTIFICATIONS</b>.</p> <p><i>Bidders who do not submit the copies duly completed and signed with their proposals will have 72 hours (three business days) to provide them. If the copies are not provided within the 72 hours, the proposal will be deemed non-compliant.</i></p>		
MR3	<p>The Bidder <b>MUST</b> specify the stream for which each proposed resource will provide services.</p> <p><b>NOTE:</b> Each proposed resource may only provide their services for one stream.</p> <p><i>Bidders who do not specify the stream for which they are submitting a bid will have 72 hours (three business days) to fully comply with this requirement. If this requirement is not fully met within the 72 hours, the proposal will be deemed non-compliant.</i></p>		

<p><b>MR4</b></p>	<p>The Bidder <b>MUST</b> include in its proposal detailed up-to-date curriculum vitae of each proposed resource. The CV should be detailed and chronological (ex.: June 1, 2009 to September 30, 2014).</p> <p>The following details should be provided:</p> <ul style="list-style-type: none"> <li>• Federal department or client name;</li> <li>• Start and End Date (month-year);</li> <li>• Project supervisor contact information (name, title, telephone number and email);</li> <li>• Roles and responsibilities of the proposed resource;</li> <li>• Detailed description of how the resource’s activities supports evaluation criterion;</li> <li>• Number of months work performed</li> </ul> <p>In order to facilitate the evaluation, bidders should refer to the format suggested at Section 3.2 – Section I: Technical Bid of this RFSO of Part 2.</p>		
<p><b>MR5</b></p>	<p>The Bidder <b>MUST</b> submit with its technical proposal, a completed and <b>signed copy by the Bidder and EACH resource – Appendix “L” – Confidentiality Policy and Agreement.</b></p> <p><i>Bidders who do not submit the copies duly completed and signed with their proposals will have 72 hours (three business days) to provide them. If the copies are not provided within the 72 hours, the proposal will be deemed non-compliant.</i></p>		
<p><b>MR6</b></p>	<p>The Bidder <b>MUST</b> submit a completed <b>Appendix “M” – Resource Information Sheet</b> for <b><u>each proposed resource</u></b>.</p> <p><i>Bidders who do not submit the copies duly completed with their proposals will have 72 hours (three business days) to provide them. If the copies are not provided within the 72 hours, the proposal will be deemed non-compliant.</i></p>		
<p><b>MR7</b></p>	<p>Proposed resources <b>MUST</b> have at least a Master’s in Psychology from a recognized university or an equivalent degree recognized by a Canadian Academic Training Evaluation Service in the case of education received outside Canada.</p> <p>Bidders <b><u>MUST</u></b> indicate:</p> <ol style="list-style-type: none"> <li>a) the diploma issued</li> <li>b) the university or graduate school that issued the diploma</li> <li>c) the year of graduation</li> <li>d) the province and country of graduation</li> </ol> <p style="text-align: center;"><b>OR</b></p> <p>Bidders <b><u>MUST</u></b> submit a copy of the diploma obtained by the proposed resource(s).</p> <p>If Bidders propose more than one resource, each resource shall be evaluated against this requirement. Each proposed resource that does not meet this requirement shall be eliminated from the process.</p>		

**Note 1: The Public Service Commission (PSC) may contact the universities, graduate schools, associations, institutions, etc. cited in a bid, or ask the Bidder to submit documentation (i.e., copy of a diploma) to substantiate the information contained in the bid.**

### 3. Rated Requirements

Technical Bids shall be evaluated and scored in accordance with the following rated requirements. For the bid of a resource to advance to the next step in the process, it must obtain the minimum scores shown in the table below. Bidders are reminded that their bids must clearly deal with each technical requirement. Only the information submitted in a bid shall be considered.

Each proposed resource shall be assessed on an individual basis, independently of any other proposed resource mentioned in the bid.

**NOTE:** Listing professional experience without providing any supporting details describing when, where and how such experience was obtained will cause the proposal to be considered non-compliant by the evaluation team. All professional experience must be fully documented and substantiated in the proposal.

**Table 3.1 – Rated Requirements**

**Bidders are reminded to consult Part 3, Section 1.2 – Definitions prior to demonstrating the following Rated Requirements**

Item #	Rated Criterion	Scoring Guidelines	Minimum Score	Cross-Reference to Proposal (Indicate section and page #)
<b>Education</b>				
<b>R1</b>	Bidders should indicate the university diplomas obtained by each proposed resource in the field of psychology. Bidders should specify the diploma, the year it was issued, as well as the university, province and country of issuance.	Points shall be awarded for the degree related to psychology.  Doctorate in Psychology from a recognized university: <b>5 points</b>	<b>0/5</b>	
<b>Experience in providing Personnel Assessment Services</b>				
<b>R2A</b>	Bidders should describe the proposed resources past experience in providing personnel assessment services in sufficient detail to evaluate its relevance to the services required as described in this RFSO.  For each assessment activity, Bidders should provide: <ul style="list-style-type: none"> <li>• an outline describing the assessment activity;</li> <li>• the assessment tools or types of assessment tools used;</li> <li>• the duration of the activity in months and years; and</li> <li>• the name or type of clients (i.e., individuals, businesses, public sector, etc.).</li> </ul> Bidders should include any training on and use of the assessment tools listed at Section 9.0 – List of Assessment Tools at Appendix “D” –	<b>Experience in providing personnel assessment services relevant to the services required by the PSC (please refer to Appendix “D”, section 9.0 – List of Assessment Tools)</b>  <b>a) Experience with Assessment Centres – please refer to the definition in section 1.2.9</b>  Points shall be awarded for the number of years of experience in providing personnel assessment services relevant to the services required by the Public Service Commission (PSC) and for the qualifications, training and experience relating to the services described at <b>Appendix “D”, section 9.0 a)</b> , as well as for any other similar and related assessment tools in an assessment centre, up to a <b>maximum of ten points</b> . The standardized tools used must be specified.	<b>4/35 (for R2A and R2B)</b>	

	<p>Statement of Work, as well as any other similar assessment tools.</p>	<p>1 to less than 5 years = 2 points                      5 to less than 10 years = 4 points                      10 to less than 15 years = 6 points                      15 to less than 20 years = 8 points                      20 years and over = 10 points</p> <p><b>b) Experience with Other Personnel Assessment Tools</b></p> <p>Points shall be awarded for each year of experience in providing personnel assessment services relevant to the services required by the PSC which included the use of the Other assessment tools listed in <b>Appendix “D”, section 9.0 b)</b>, or other similar tools, up to a <b>maximum of ten points</b>. The standardized tools used must be specified.</p> <p>1 to less than 5 years = 2 points                      5 to less than 10 years = 4 points                      10 to less than 15 years = 6 points                      15 to less than 20 years = 8 points                      20 years and over = 10 points</p>		
<p><b>R2B</b></p>		<p><b>Other relevant experience (excluding experience with the assessment tools described under Section 9.0 of Appendix “D”)</b></p> <p><b>a) Experience in providing personnel assessment services (with limited or unspecified use of assessment tools)</b></p> <p>Points shall be awarded up to a <b>maximum of five points</b> for each year of experience in providing personnel assessment services where assessment tools were used, but in a limited or unspecified manner. The standardized assessment tools used must be specified.</p> <p>1 to less than 5 years = 1 point                      5 to less than 10 years = 2 points                      10 to less than 15 year = 3 points                      15 to less than 20 years = 4 points                      20 years and over = 5 points</p> <p><b>b) Experience in providing psychological assessments</b></p> <p>One point shall be awarded for each year of experience during which psychological</p>		

		<p>assessments were completed, up to a <b>maximum of five points</b>. The standardized tools used must be specified.</p> <p>1 to less than 5 years = 1 point                      5 to less than 10 years = 2 points                      10 to less than 15 year = 3 points                      15 to less than 20 years = 4 points                      20 years and over = 5 points</p> <p>c) Experience in providing leadership assessment services</p> <p>One point shall be awarded for each year of experience in providing leadership assessment services, up to a <b>maximum of five points</b>.</p> <p>1 to less than 5 years = 1 point                      5 to less than 10 years = 2 points                      10 to less than 15 years = 3 points                      15 to less than 20 years = 4 points                      20 years and over = 5 points</p>		
<p><b>R3</b></p>	<p>Bidders should demonstrate that the proposed resource possesses the experience in applying the theories, methods and professional standards relating to the following two areas, by specifying the appropriate course and/or other courses, certifications and/or certified programs completed by the resource.</p> <ol style="list-style-type: none"> <li>1. Theory of Industrial or Organizational Psychological Sciences, including theories relating to measures and personnel assessment;</li> <li>2. Current methods of personnel assessment, including psychometric testing; and relevant aspects of professional standards for testing and assessment.</li> </ol>	<p>a) One point shall be awarded for having demonstrated experience in applying the theories 1 and 2 below, methods and professional standards relating to psychology, to a <b>maximum of five points</b>.</p> <ol style="list-style-type: none"> <li>1. Theory of Industrial or Organizational Psychological Sciences, including theories relating to measures and personnel assessment;</li> <li>2. Current methods of personnel assessment, including psychometric testing; and relevant aspects of professional standards for testing and assessment.</li> </ol> <p>b) One point shall be awarded for each relevant certification or special certified program completed outside of a university program, to a <b>maximum of five points</b>.</p>	<p><b>0/10</b></p>	

**4. Financial Evaluation**

The Bidder must include a completed Appendix “H” – Basis of Payment in its proposal.

The price of the bid will be evaluated in Canadian dollars, the Harmonized Sales Tax, Goods and Services Tax, Quebec Sales Tax or Provincial Sales Tax excluded.

The bids that meet the minimum score as set out in section 3 – Rated Requirements above will then be evaluated based on the financial evaluation of the prices/rates proposed in Appendix “H” – Basis of Payment. Should the Bidder submit different prices/rates for each of its compliant proposed resources, the average of the Bidder’s proposed all-inclusive rates will be used for items 1 to 15. A Bid Evaluation Value (BEV), which will be used for evaluation purposes only, will be calculated as per section 5.1 – Determining the total estimated cost.

### 5. Basis of Selection-Lowest Price Per Point

To be declared responsive, a bid must:

- a) comply with all the requirements of the RFSO;
- b) meet all mandatory requirements; and
- c) obtain the required minimum of points for the rated requirement which are subject to point rating.
- d) quote firm prices and/or rates which may not be higher than the PRICE AND/OR RATE CAPS ESTABLISHED for the proposed services.

Bids not meeting (a) or (b) or (c) or (d) will be declared non-responsive. Neither the responsive bid that receives the highest number of points nor the one that proposed the lowest price will necessarily be accepted.

#### 5.1 Determining the total estimated cost

The total estimated cost shall be determined by adding the all-inclusive prices for items 001 to 015 at Appendix “H” – Basis of Payment.

#### 5.2 Determining the point total of the technical component

When one resource is proposed, the point total for the technical component is equal to the point total obtained by that resource. When more than one resource is proposed, the point total obtained by each responsive resource will be added and then divided by the number of responsive resources for that stream, to give the point total for the technical component. Any resource which does not obtain the minimum score shall be deemed non-compliant and his/her score shall not be included in the average score.

#### 5.3 Determining the best value offer

The recommendations for award will be determined using the evaluated cost-per-point methodology and by ranking responsive Bidders from lowest to highest evaluated cost-per-point. The total estimated cost of each of the responsive proposal not exceeding the specified prices and/or rates will be divided by the overall rating assigned to the Technical Proposal, to determine the cost per point:

- a) The total estimated cost of each responsive bid which meets the established price or rate caps shall be divided by its respective number of technical points to determine the cost per point:

Responsive bids shall then be ranked on the basis of their cost per point, from the lowest to the highest. Fully responsive bidders with lower costs-per-point will be ranked higher on the Standing Offer rotation list. Please see the example that follows.

$$\text{Formula: } \frac{\text{Total Bid Evaluation Value}}{\text{Average technical score for the Bidder's compliant proposed resource(s)}} = \text{Cost per point}$$

#### Example:

Both Bidder A and Bidder B meet conditions (a), (b), (c) and (d) above and their bid has been declared responsive. If Bidder A has a Bid Evaluation Value (BEV) of \$1,600 and 1,000 technical points, Bidder A's cost per point will be  $\$1,600 / 1,000 = \$1.60$ .

If Bidder B has a Bid Evaluation Value (BEV) of \$1,000 and 1,200 technical points, Bidder B's cost per point Bidder B will be  $\$1,000 / 1,200 = \$0.83$ .

Bidder B has the lower cost-per-point and would be ranked higher on any resulting Standing Offer rotation list. If two (2) or more eligible proposals obtain the same rating, a recommendation will be made to rank higher on any resulting Standing Offer rotation list the bidder with the best technical rating.

Should there be multiple proposals having identical cost-per points and identical technical scores, the PSC will rank the bidders with the highest points in the following priority order: 1) R2, 2) R1, 3) R3.

b) Of the best responsive bids, **twenty (20)** Standing Offers shall be awarded as per the following:

The PSC shall award **twenty (20)** Standing Offers in total. If twenty (20) compliant bids are submitted for Stream A (Bilingual Services), the twenty (20) Standing Offers shall be awarded in that stream and, as a result, none shall be awarded in Stream B (English) or Stream C (French).

**If fewer than twenty (20) compliant bids** are received for Stream A (Bilingual Services), the remaining Standing Offers shall be divided among the compliant bids received for the other two streams (B – English and C – French) on the basis of the lowest price per point described above, **up to a maximum of ten (10) Standing Offers for Stream B and ten (10) Standing Offers for Stream C.**

Since the number of Standing Offers awarded by stream depends on the number and nature of the bids received, the exact number of Standing Offers awarded by stream cannot be determined ahead of time.

## PART 4 – CERTIFICATIONS

Bidders must provide the required certifications to be issued a Standing Offer. The PSC will declare a bid non-responsive if the required certifications are not completed and submitted as requested.

Compliance with the certifications Bidders provide to the PSC is subject to verification by the PSC during the bid evaluation period (before issuance of a Standing Offer) and after issuance of a Standing Offer. The PSC Standing Offer Authority will have the right to ask for additional information to verify the Bidders' compliance with the certifications before issuance of a Standing Offer. 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 PSC Standing Offer Authority for additional information will also render the bid non-responsive.

### 1. Certifications Precedent to Issuance of a Standing Offer

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 PSC Standing Offer Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the PSC Standing Offer Authority and meet the requirements within that time period will render the bid non-responsive.

#### 1.1 Federal Contractors Program for Employment Equity - Standing Offer Certification

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

Canada will have the right to declare an offer non-responsive, or to set-aside a Standing Offer, if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list at the time of issuing of a Standing Offer or during the period of the Standing Offer.

\_\_\_\_\_  
Signature of authorized representative

\_\_\_\_\_  
Date

#### 1.2 Former Public Servant Certification

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

#### Definitions

For the purposes of this clause,

1. "Former public servant" means a former member of a department as defined in the *Financial Administration Act*, R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police and includes:
  - a) an individual;
  - b) an individual who has incorporated;
  - c) a partnership made up of former public servants; or
  - d) a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.
2. "lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the Public Service.

3. "pension" means a pension payable pursuant to the *Public Service Superannuation Act*, R.S., 1985, c. P-36 as indexed pursuant to the *Supplementary Retirement Benefits Act*, R.S., 1985, c. S-24.

**Former Public Servant in Receipt of a Pension**

Bidders who are former public servants in receipt of a pension must identify themselves as such by completing the following:

- ( ) The bidder is a former public servant in receipt of a pension;
- ( ) The bidder is a former public servant in receipt of a pension who has incorporated;
- ( ) The bidder is a partnership made up of former public servant in receipt of a pension;
- ( ) The bidder is a former public servant in receipt of a pension who is the sole proprietorship or has a major interested in the entity;
- ( ) The bidder is a former public servant not in receipt of a pension.
- ( ) The bidder is NOT a former public servant.

If the Bidder is a FPS in receipt of a pension, the Bidder must provide the following information:

- a) Name of the former public servant\_\_\_\_\_
- b) Date of termination of employment or retirement from the Public Service\_\_\_\_\_
- c) Former maximum salary\_\_\_\_\_
- d) Total annual (gross) pension\_\_\_\_\_

**Work Force Reduction Program**

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of a work force reduction program?

YES ( ) NO ( )

If so, the Bidder must provide the following information:

- a) Name of former public servant\_\_\_\_\_
- b) Conditions of the lump sum payment incentive\_\_\_\_\_
- c) Date of termination of employment\_\_\_\_\_
- d) Amount of lump sum payment\_\_\_\_\_
- e) Rate of pay on which lump sum payment is based\_\_\_\_\_
- f) Period of lump sum payment including start date, end date and number of weeks\_\_\_\_\_
- g) Number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program\_\_\_\_\_

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

**Certification**

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

\_\_\_\_\_  
Signature of authorized representative

\_\_\_\_\_  
Date

**1.3 Status and Availability of Resources**

The Bidder certifies that, should it be issued a Standing Offer as a result of the Request for Standing Offers, every individual proposed in its bid will be available to perform the Work resulting from a Call-up against the Standing Offer as required by Canada's representatives and at the time specified in a Call-up or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with the same or better qualifications and experience. The Bidder must advise the Standing Offer Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement.

If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Standing Offer Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability.

\_\_\_\_\_  
Signature of authorized representative

\_\_\_\_\_  
Date

**1.4 Conflict of Interest**

The Bidder acknowledges and agrees that it is a term of this RFSO that no person who is not in compliance with the provisions of Chapter 2 - Conflict and Interest Measures and Chapter 3 - Post-Employment Measures of the *Values and Ethics Code for the Public Service* (current version) shall derive any direct benefit from this RFSO, any resulting Standing Offer and/or Call-up. The Bidder further acknowledges and agrees that failure to comply with the provisions of chapters 2 and 3 referenced herein will render the Bidder ineligible to provide services under any Standing Offer or Call-up resulting from this RFSO.

The Bidder certifies that he has not accepted or received, directly or indirectly, advantage, benefit, preferential treatment or assistance of any kind through a member of his family or a friend in relation to this RFSO and any resulting Standing Offer or Call-up.

\_\_\_\_\_  
Signature of authorized representative

\_\_\_\_\_  
Date

### 1.5 Certificate of Independent Bid Determination

I, the undersigned, in submitting the accompanying bid or tender (hereinafter “bid”) to the Public Service Commission for this Request for Standing Offers do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of:

---

(Corporate Name of Bidder or Tenderer [hereinafter “Bidder”])

That:

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the Bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the Bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the Bidder to determine the terms of, and to sign, the bid, on behalf of the Bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word “competitor” shall include any individual or organization, other than the Bidder, whether or not affiliated with the Bidder, who:
  - (a) has been requested to submit a bid in response to this call for bids;
  - (b) could potentially submit a bid in response to this call for bids, based on their qualifications, abilities or experience;
6. The Bidder discloses that **(check one of the following, as applicable):**
  - (a)  the Bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with, any competitor;
  - (b)  the Bidder has entered into consultations, communications, agreements or arrangements with one or more competitors regarding this call for bids, and the Bidder discloses, in the attached document(s), complete details thereof, including the names of the competitors and the nature of, and reasons for, such consultations, communications, agreements or arrangements;
7. In particular, without limiting the generality of paragraphs (6)(a) or (6)(b) above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
  - (a) prices;
  - (b) methods, factors or formulas used to calculate prices;
  - (c) the intention or decision to submit, or not to submit, a bid; or
  - (d) the submission of a bid which does not meet the specifications of the call for bids; except as specifically disclosed pursuant to paragraph (6)(b) above;
8. In addition, there has been no consultation, communication, agreement or arrangement with any competitor regarding the quality, quantity, specifications or delivery particulars of the products or services to which this call for bids relates, except as specifically authorized by the Tendering Authority or as specifically disclosed pursuant to paragraph (6)(b) above;à

9. The terms of the accompanying bid have not been, and will not be, knowingly disclosed by the Bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening, or of the awarding of the contract, whichever comes first, unless otherwise required by law or as specifically disclosed pursuant to paragraph (6)(b) above.

\_\_\_\_\_  
(Printed Name and Signature of Authorized Agent of Bidder)

\_\_\_\_\_  
Position Title

\_\_\_\_\_  
Date

### 1.6 Language Certification:

The Bidder certifies that, for each of the languages identified for a proposed resource under Appendix “M” – Resource Information Sheet, the propose resource possesses an advanced reading, oral interaction and writing proficiency in that language.

For the purpose of this RFSO and resulting Standing Offers, an individual who is “advanced” in English and/or French can **as a minimum** perform the following tasks in **English and/or French**:

#### **Advanced Reading Proficiency:**

Ability to understand texts dealing with a wide variety of work-related topics; ability to understand most complex details, interferences and fine points of meanings; ability to read with good comprehension specialized or less familiar material.

#### **Advanced Oral Interaction Proficiency:**

Ability to give detailed explanations and descriptions; ability to handle hypothetical questions; ability to support an opinion, defend a point of view, or justify an action; ability to counsel and give advice; ability to handle complex work-related situations.

#### **Advanced Writing Proficiency:**

Ability to write explanations or descriptions in a variety of informal and formal work-related situations; ability to write texts in which the ideas are developed and presented in which vocabulary, grammar and spelling are generally appropriate and require few corrections.

\_\_\_\_\_  
Signature of authorized representative

\_\_\_\_\_  
Date

### 1.7 Certification of education and experience

The Bidder hereby certifies that all statements made with regard to the education and experience of the resources proposed for carrying out the work relating to this bid are accurate and factual. The Bidder is aware that the PSC reserves the right to verify any information provided in this regard and that untrue statements may result in the bid being declared non-responsive or result in any other action that the PSC may consider appropriate.

\_\_\_\_\_  
(Name and signature of the Bidder's authorized representative)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

## **PART 5 - STANDING OFFER AND RESULTING CONTRACT CLAUSES**

### **A. STANDING OFFER**

#### **1. Bid**

The Standing Offer Holder offers to perform the Work in accordance with the Statement of Work at Appendix D.

#### **2. Standard Clauses and Conditions**

Appendices “A”, “B”, “C”, “D”, “E”, “F”, “G”, “H”, “I”, “J”, “K”, “L” and “M” are incorporated by reference into and form part of the Standing Offer or any resulting Call-up.

#### **3. Period of Standing Offer**

The period for making Call-ups against the Standing Offer is for a two (2) year period beginning on the date of Standing Offer Authorization.

If the Standing Offer is authorized for use beyond the initial period, the Standing Offer Holder offers to extend its bid for an additional three (3) one-year periods, under the same conditions and at the rates or prices specified in the Standing Offer, or at the rates or prices calculated in accordance with the formula specified in the Standing Offer.

The Standing Offer Holder will be advised of the decision to authorize the use of the Standing Offer for an extended period by the Standing Offer Authority. A revision to the Standing Offer will be issued by the Standing Offer Authority.

#### **4. Authorities**

##### **4.1 Standing Offer Authority**

The Standing Offer Authority (*to be confirmed upon resulting Standing Offer*) for the Standing Offer is responsible for the establishment of the Standing Offer, its administration and its revision, if applicable. Upon the making of a Call-up, the Standing Offer Authority is responsible for any contractual issues relating to individual Call-ups made against the Standing Offer.

##### **4.2 Project Authority**

The Project Authority (*to be confirmed upon resulting Standing Offer*) for the Standing Offer is:

- identified in the Call-up against the Standing Offer.
- the representative of the Division for whom the Work will be carried out pursuant to a Call-up against the Standing Offer and is responsible for all the technical content of the Work under the resulting Call-up.

#### **5. Call-up Procedures**

The workload will fluctuate based on client needs and the number of human resources renewal measures under way in the Federal Public Service of Canada.

PSC will make a best effort to evenly allocate Call-ups among the Call-up holders. Availability and other factors may limit the PSC's ability to allocate Call-ups evenly. The Rotation List will be arranged in ascending order of cost per point.

The Standing Offer Holder acknowledges that a Standing Offer is not a contract and that the issuance of a Standing Offer and Call-up Authority does not oblige or commit Canada to procure or contract for any goods, services or both listed in the Standing Offer, or to establish a contract for that purpose.

Without restricting any other terms and conditions, any Work Authorization may be cancelled in whole or in part by the Project Authority by giving a verbal or written notice to the Standing Offer Holder.

Work shall be awarded to Standing Offer Holders on a **rotating** basis. Three rotation lists shall be established: Stream A—Bilingual Contractors, Stream B—Anglophone Contractors, and Stream C—Francophone Contractors. Each rotation list will rank Contractors in order of increasing cost per point and on the basis of the Selection Method described in Part 3 – Evaluation Procedures and Basis of Selection. These lists shall have the following format (*to be completed and included in the Standing Offer once it has been awarded*):

For each work order, the Project Authority shall select, on a rotating basis, the Standing Offer Holder for **Stream A (Bilingual Services)** when the work requires bilingual services based on the following criteria:

1. Specialization
2. Sensitivity and diversity
3. Availability

**If no Standing Offer Holder from Stream A is able to accept the work when bilingual assessors are required, the PSC shall award the work based on the language requirements** and will assign the work, on a rotating basis, to the Standing Offer Holders from Stream B or Stream C, based on the following criteria:

- i. Language (Stream B or Stream C)
- ii. Specialization
- iii. Sensitivity and diversity
- iv. Availability

For the purposes of this Standing Offer, the criteria listed above are defined as follows:

1. Specialization

In the interest of the client, the requested service may require the work to be assigned to a Contractor who has experience in a specialized area or a combination of the criteria listed above (in accordance with professional evaluation standards or in the best interest of a client). The requested service may require (as per professional assessment standards or in the best interest of a client) that the work be allocated to a Contractor with a proposed resource who has:

- experience at a given level of leadership (such as Highest Ranking Senior Executive in an organization, Senior Executive, etc.); or
- experience in a specific type of organization, or in a given range of organizations; or
- experience in certain functions or roles (e.g., policy development, operations, work at a political level); or
- expertise in a specific field (e.g., financial management, human resources management, management of scientific or professional groups); or
- demonstrated competence or special interest and ability in a particular area of coaching or counselling (e.g., selection methodology, strategic career planning, job search strategies).

2. Sensitivity and diversity

The requested service may require (for professional assessment standards or at a client's request) that the proposed resource be able to address or have experience with specific employment equity needs or be a member of an employment equity group (women, visible minority, persons with disabilities, or Aboriginal people).

**3. Availability**

- A given client or assessment process may require the delivery of the service for a specific period of time or number of candidates (less than 15) or on short notice, when the availability of the resource may affect the assignment of work.
- If a higher ranked Standing Offer Holder meeting the criteria listed above is unable to provide the services in the prescribed timelines, the Project Authority may request the services of the next Standing Offer Holder on the list who meets the same criteria, and so on.
- The Standing Offer Holder acknowledges that a Standing Offer is not a contract and that the issuance of a Standing Offer and Call-up Authority does not oblige or commit Canada to procure or contract for any goods, services or both listed in the Standing Offer, or to establish a contract for that purpose.
- Without restricting any other terms and conditions, any Work Authorization may be cancelled in whole or in part by the Project Authority by giving a verbal or written notice to the Standing Offer Holder.
- The Standing Offer Holder must respond within 48 hours to calls/messages offering work from the Project Authority. If Standing Offer Holders are aware in advance that they will be away or unavailable for a prolonged period of time, it is their responsibility to inform the project authority. If after two (2) successive times, Contractors do not respond within 48 hours in order to either accept or decline the work being offered, they may be removed from the list and/or no longer be considered for future work.

**6. Call-up Instrument**

The Project Authority will authorize work by phone or by email amongst Standing Offer Holders, based on the on the Call-up procedures listed above. Once the work has been carried out, the Standing Offer Holder will invoice the PSC for the monthly services. Once approved by the Project Authority, a Call-up using form PWGSC-TPSGC 942, "Call-up against a Standing Offer", will be issued in accordance to the pre-authorize work and accepted invoice.

**7. Limitation of Call-ups**

Individual Call-ups against the Standing Offer must not exceed \$20,000 (Taxes included).

**7.1 Requirements exceeding the authorized \$20,000 cap for call-ups**

For requirements exceeding the \$20,000 limit, a call-up must be awarded in advance of the work commencing. Individual Call-ups exceeding \$20,000 can only be authorized using a PWGSC-TPSGC 942 form, "Call-up against a Standing Offer", signed by the Standing Offer Authority or one of his or her representatives and awarded prior to work commencing.

**8. Invoicing**

The Contractor should use the invoice template under Appendix "K". An invoice is to be provided at the end of the month, for work completed within that same month.

**9. Priority of Documents**

If there is a discrepancy between the wordings 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.

- 9.1 The Call-up against the Standing Offer, including any Appendixes;
- 9.2 Appendix "A" – General Conditions of a Service Contract;
- 9.3 Appendix "B" – Supplementary Conditions of a Service Contract;
- 9.4 Appendix "C" - Terms of Payment of a Service Contract;
- 9.5 Appendix "D" – Statement of Work;

- 9.6 The articles of the Standing Offer;
- 9.7 Appendix “F” – General Conditions – Standing Offers – Goods or Services;
- 9.8 Appendix “G” – Standard Instructions – Request for Standing Offers – Goods or Services – Competitive Requirements; and
- 9.9 The Contractor's bid \_\_\_\_\_ (*insert date of bid*) (*If the bid was clarified or amended, insert at the time of issuance of the bid: “, as clarified on \_\_\_\_\_” or “, as amended \_\_\_\_\_.* (*insert Date of clarification(s) or amendment(s) if applicable*)

#### **10. Status and Availability of Resources**

If for reasons beyond its control, the Standing Offer Holder is unable to provide the services of an individual named in its standing offer, the Standing Offer Holder may propose a substitute with similar qualifications and experience. The Contractor must advise the Standing Offer Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. The Standing Offer Authority will provide its approval for the substitution prior to a call-up issuance.

If the Standing Offer Holder is unable to provide a substitute with the equal or superior qualifications and experience, Canada may set aside the Standing Offer.

#### **11. Closure of Government Offices**

Where the Standing Offer Holder’s employees are providing services on government premises pursuant to any Call-up resulting from this Standing Offer and the premises become non-accessible due to evacuation or closure of government offices, and consequently no work is being performed as a result of the closure, the PSC will not be liable for payment to the Contractor for the period of closure.

#### **12. Cancelling the Work Authorization**

Without restricting any other terms and conditions, any Work Authorization may be cancelled in whole or in part by the Project Authority by giving a verbal or written notice at least 24 hours prior to the date and time of the work requested. No costs shall be incurred by Canada for such a cancellation.

Cancellation fees may be paid to the Contractor if the Project Authority cancels a Work Authorization without notifying the Standing Offer Holder at least 24 hours prior to the date and time of the work requested. Cases where payments are made to Contractors, as well as related cancellation charges, are specified at Appendix “H — Basis of Payment, of this Standing Offer.

**B. RESULTING CONTRACT CLAUSES (FOR CALL-UP)**  
**APPENDIX “A” - General Conditions of a Service Contract**  
**APPENDIX “B” - Supplementary Conditions of a Service Contract**  
**APPENDIX “C” - Terms of Payment of a Service Contract**

The above documents are available at the following Web site:

<http://www.psc-cfp.gc.ca/abt-aps/bus-aff/index-eng.htm>

**Integrity Provisions:**

The *Ineligibility and Suspension Policy* (the “Policy”) and all related Directives incorporated by reference into the bid solicitation on its closing date are incorporated into, and form a binding part of the Contract. The Contractor must comply with the provisions of the Policy and Directives, which can be found on Public Works and Government Services Canada’s website at Ineligibility and Suspension Policy: <http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>.

## APPENDIX “D” - Statement of Work

### 1.0 Title:

Psychological Personnel Assessment Services for the Public Service Commission of Canada (PSC), for the National Capital Region (NCR).

### 2.0 Objective:

The objective of this Request for Standing Offers is to establish twenty (20) standing offers with one or more Standing Offer Holders able to supply psychological personnel assessment services related to the assessment instruments used at the Personnel Psychology Centre (PPC) of the Public Service Commission of Canada (PSC) in the NCR, on an “as and when required basis,” in accordance with the general conditions of the standing offer. All standing offers will be attributed to Standing Offer Holders that have proposed resources who individually can offer their services **in both English and French (Stream A), in English only (Stream B) or in French only (Stream C)**. The work is performed on a semi-regular basis, when the current workforce of PPC is unable to meet the demand.

### 3.0 Background:

The PPC in the NCR administers assessment instruments and tailors its instruments to meet specific client requirements and needs, including assessment centres, management simulation exercises, 360-degree feedback, structured reference checks, candidate achievement records, personality inventories, various types of paper-and-pencil tests, in-basket exercises and other custom-designed instruments. This wide range of standardized tests assesses and develops the leadership skills, as well as the other skills and abilities, of the public servants of Canada exercising managerial or non-managerial roles. The requirements are for qualified resources who will administer these assessment tools (e.g., Simulations for the selection of Executives (SELEX), Simulations for the Identification of Leadership (SIL), etc.) to ensure the integrity of the assessment tools and that the assessment meets approved professional standards and procedures

Training will be provided for each tool before the resource is required to administer it. Contractors will NOT be remunerated for participating in the initial training, shadowing and orientation sessions for each assessment instrument or service to be supplied. A “Payment Schedule for Training Sessions” is shown at Appendix “H” – Basis of Payment.

Normally, proposed resources must be available for the five calendar days following the request. Proposed resources may sometimes be called upon to provide services more urgently, with less than 24 hours’ notice.

### 4.0 Assessment Centres (AC) and/or Additional or Revised Instruments:

As assessment instruments administered by the PPC may be revised and/or additional instruments may be developed during the course of the resulting Standing Offer, the Project Authority reserves the right to introduce modified or revised instruments to the current list.

### 5.0 Tasks:

The contractor will provide as authorized by the Project Authority (PA) includes any or all of the following tasks:

1. Scoring “in-basket” and written exercises as part of an assessment centre or a simulation;
2. Observing participants behaviour during simulations (individual and group exercises) or assessment centres;
3. Taking verbatim (word for word) notes of observations and discussions;

4. Participating in role-play situations;
5. Participating in structured interviews;
6. Completing appropriate scoring summary sheets to summarize observations;
7. Integrating assessment data, awarding a score for each skill/ability assessed (assessors share and consolidate their observations and reach consensus on the rating when required);
8. Producing or drafting high quality assessment reports;
9. Administering standardised tests and simulations;
10. Receiving candidates when they report on site;
11. Preparing and revising assessment material on site;
12. Accessing skills scoring on-line;
13. Providing feedback to candidates and departments on the results obtained with the assessment instruments used;
14. Providing feedback to candidates on the results of personality inventories;
15. Ensuring the integrity of the assessment tool and that the members of the assessment committee comply with established standards and procedures;
16. Participating in information and feedback sessions to give specialized advice, lessons learned and recommendations;
17. Carrying out other related administrative tasks on site; and
18. Any other services related to the assessment of the competencies or abilities of employees of the Public Service, as requested by the PPC.

### **5.1. Other related tasks**

The following tasks may be requested by the Project Authority to offer other PPC products and services in order to respond to needs that cannot be completely fulfilled by PPC employees. These services include, without limiting it to, the following functions:

- Research and statistical activities
- Taking part in developmental modifications and up-to date activities related to measurement instruments, related documentation, competency resource guides, etc.
- Taking part in project management
- Any other personnel assessment activity
- Delivery of evaluation services related to accommodations, consultations, seminars, etc.

### **6.0 Access to on-line SELEX tool**

The PPC shall provide the resources on-site access to the on-line SELEX tool at the Assessment and Counselling Services Division (ACSD) so that they may record the scores of the participants, as needed.

### **7.0 ACSD Personnel Assessment Materials**

The resources will be authorized to use the personnel assessment materials, subject to the following conditions:

- a) This material is protected under the *Copyright Act*, with which the retained proposed resources must comply.

- b) The retained proposed resources must agree to use the material only for the purpose of conducting personnel assessments of individuals employed by the federal government or of any other participant identified by the PPC.
- c) The retained proposed resources must agree to not integrate, reproduce or tailor the assessment materials, in whole or in part, in any other materials.
- d) The retained proposed resources must agree to assess, integrate, prepare and provide feedbacks and produce reports on site. Depending on clients' requests, this condition may require flexibility of the part of the contractor.
- e) Any breach of these conditions by the retained proposed resources without the prior consent of the PPC may result in the cancellation of the Standing Offer.

## **8.0 Client Support**

The retained proposed resources must provide a telephone number and e-mail address to the participants if the participants request feedback on the assessment process or any other information relating to the process in which the retained proposed resource took part.

## **9.0 List of Assessment Tools**

The list of assessment tools usually used by the PPC is provided below (other tools are also used):

### a) Assessment Centres

- Simulations for the Selection of Executives (SELEX)
- Simulations for the Identification of Paths to EX development (IPEX)
- Simulations for the Identification of Leadership (SIL)
- Assessment Centre for Identification of Middle Management Potential (IMPP)
- Simulation Exercise for Senior Executives, Level 03 (EX-03)

### b) Other Assessment Tools

- Candidate Achievement Record (CAR)
- 360° Feedback
- Simulations (400, 700 and 800 series)
- OPQ (Occupational Personality Questionnaire)
- Feedback Sessions
- Interviews.

## **10.0 Deliverables**

- a) A SELEX Assessment Centre assessment is complete once the retained proposed resource has recorded the participant's scores in the on-line tool, and submitted the materials and protected files to the Project Authority at ACSD. This deliverable must be provided no later than the end of the first working day following the SELEX assessment.
- b) All other assessments are complete when the proposed resource has submitted a written report (using the electronic template provided), with the protected documents and files attached, to ACSD. This deliverable must be provided within five calendar days of the assessment date.
- c) All assessment materials and related documents must remain in the offices of ACSD. The proposed resource will have access to a secure filing cabinet and a workstation to store his/her assessment files and draft the report.

- d) The Standing Offer may be terminated if the Standing Offer Holder refuses, three consecutive times, to perform his/her assigned tasks, unless he/she has previously advised the ACSD Project Authority of his/her unavailability. These conditions have been put in place for efficiency and to keep current the Standing Offer Holder' skills and knowledge, in accordance with the standards and procedures established by ACSD.

### **11.0 Language Requirement**

The services specified at Section 5.0 and 5.1— Task must be provided in English, in French, or in both official languages, based on the requirements of the client.

### **12.0 Contractor Training and Orientation Sessions:**

a) Before Call-ups against the Standing Offer can be authorized, all Standing Offer Holder proposed resource(s) must successfully complete a Role Play training exercise in either both English and French (Stream A), in English only (Stream B), or in French only (Stream C), within a month of being awarded the Standing Offer (see Appendix "J" for information pertaining to the Role Play). A formal invitation will be sent by email to the Standing Offer Holder stating the date and time of the Role Play training exercise. The Standing Offer Holder will have 48 hours (2 working days) to confirm the appointment. Should the time and date specified be unsuitable for the resource(s), the Standing Offer Holder must request an alternate date and time within the specified 48 hours (2 working days) time-frame. It is expected that the Role Play training exercise will be held within a month of Standing Offer award. **All Role Play training exercises must be completed no later than two (2) months of Standing Offer award**, unless unforeseen circumstances occurs. The decision to extend the Role Play training exercise period remains solely the PSCs, and the PSC is under NO obligation to grant an extension requested by a Standing Offer Holder of the Role Play training exercise.

It is the Standing Offer Holder's responsibility to ensure that the email address provided in the **Proposal to the Public Service Commission Bidder Information and Authorization** (on page 4 of the Request for Standing Offer) is valid, and to communicate the scheduled time and date of the Role Play to its resource(s). Should a resource fail to be present for his or her scheduled Role Play training exercise due to unforeseen circumstances, the PSC may schedule a make-up Role Play training exercise date, if the PSC deems it appropriate and/or the schedule allows it. The decision to schedule a make-up Role Play training exercise date remains solely the PSCs and the PSC is under NO obligation to grant the make-up training exercise date.

Only resources who achieve a **PASS mark on the Role Play training exercise** will be assigned work under the Standing Offer. For **STREAM A** (Bilingual: English and French), if a resource does not pass the Role Play training exercise in any of the two official languages, they will not be considered for work under the Standing Offer and the Standing Offer will be withdrawn if none of the Standing Offer Holder's resources pass the Role Play exercise. For **STREAM A** (Bilingual: English and French), if a resource passes the Role Play training exercise in one of the two official languages, but does not pass the exercise in one of the two official languages, they will be considered for work under the Standing Offer for Stream B (English) or Stream C (French). Resources who do not pass the Role Play training exercises for Stream A or exercise for Stream B or for Stream C, will no longer be considered for work under the Standing Offer. Similarly, any resource who fails to participate in the Role Play training exercise will be awarded a FAIL mark, and will no longer be considered for work under the Standing Offer.

b) Before Call-ups against the Standing Offer can be authorized, the Standing Offer Holder's resource(s) must attend and successfully complete specific training and/or orientation sessions for assessors (at their own expense) related to the assessment tools and services to be offered. The Standing Offer Holder's resource(s) must participate in and successfully complete a training and/or orientation session of up to three (3) days for each of the instruments and assessment services to be supplied. The training session(s) will consist of a review of the specific assessment approach or method used and/or the competencies to be assessed, as well as the standing offer holder's role and responsibilities, in accordance with the general conditions of the standing offer. Some training sessions may require the Standing Offer Holder to shadow assessments. Where shadowing is required, a minimum of one (1) shadowing session may occur. The Standing Offer Holder may choose to do a second shadowing at their own expense; however, the Standing Offer Holder's are expected to be able to function independently in their assessment roles and tasks after a maximum of two (2) shadowing sessions.

In order to assess this, PSC will shadow the Standing Offer Holder during their first assessment using each tool and complete a Quality Assurance Monitoring Report as indicated in Appendix “E”. The Standing Offer Holder must achieve a rating of “Satisfactory” under each relevant component in order to successfully complete the training/orientation session. If any of the components are deemed to be “Unsatisfactory”, PSC will propose a plan to allow the Standing Offer Holder or its resource(s) to improve in the unsatisfactory areas. PSC will then shadow the Standing Offer Holder or its resource(s) a second time. If after two shadowing sessions, the Standing Offer Holder or its resource(s) does not achieve a rating of “Satisfactory” on each of the relevant components, the PSC may decide to no longer consider the Standing Offer Holder or its resource(s) for work under the Standing Offer. Such decisions will be communicated to the Standing Offer Holder in writing.

**Attendance at an initial training or orientation session (including the Role Play training exercise) shall be at the Standing Offer Holder’s sole expense and at no cost to the Crown. Note that the initial training session includes multiple training activities.** The Standing Offer Holder will have 48 hours (2 working days) to confirm availability to the training and/or orientation session of the resource(s). The Standing Offer Holder’s resource(s) must complete successfully the training and / or orientation session on a given assessment tool. The Standing Offer Holder or its resource(s) who have already successfully completed the training and / or orientation session are not required to repeat it unless the project authority determines that refresher training is required. In such cases, this will be considered an initial training session, and will be at no cost to the PSC.

### **13.0 Conditions for Work Allocation and Proposed Resource Performance:**

#### **13.1 Initial call-up**

In order for its first call-up to be placed, the Standing Offer Holder’s resource(s) must attend the training and/or orientation sessions specified in section 12.0 above. The resource(s) must meet the quality assurance criteria (QAC) described in the Quality Assurance Monitoring Report in section 13.3 of Appendix D – Statement of Work.

The resource(s)’s participation and performance during the training session will be subject to monitoring by the project authority.

#### **13.2 Future work requirements**

During the period of the standing offer, the Project Authority will conduct regular quality assurance checks to monitor the work done by the Standing Offer Holder’s resource(s). The Quality Assurance Monitoring Report will be used to record the results. The Project Authority will also meet with the Standing Offer Holder and/or its resource(s) on an “as needed” basis for quality assurance (QA) review and feedback purposes.

The frequency of monitoring will depend on the service provided but will be at least once a year with or without prior notice. The Standing Offer Holder shall allow the project authority to monitor the assessment process at any time.

To be called back in the future, the resource(s) must pass the applicable quality assurance checks (QAC) described in the Quality Assurance Monitoring Report each time the work is checked. If the resource(s) performance is found unsatisfactory on one of the applicable criteria, corrective measures will be recommended and the Standing Offer Holder and/or its resource(s) will be given time to correct the situation. If the proposed corrective measures do not allow the situation to be corrected within the established time frame, the Standing Offer Holder and its resource(s) will no longer be able to provide services for the specific assessment component or instrument(s) or service(s) identified in the unsatisfactory performance report.

#### **13.3 Quality assurance checks (QAC)**

During the period of the standing offer, the Project Authority will conduct regular quality assurance checks to monitor the work done by the resource(s), using the Quality Assurance Monitoring Report. The project authority or responsible psychologist/delegate will meet with each Standing Offer Holder or its resource(s), as required, for quality assurance review and feedback. The monitoring will take place anytime throughout the year and may or may not be announced in advance. **Attendance at a quality assurance review and feedback session shall be at the Standing Offer Holder’s sole expense and at no cost to the Crown.**

**14.0 Cancelling the Work Authorization:**

- 14.1 In accordance with Appendix “H” – Basis of Payment of the Request for Standing Offers, the Contractor shall be paid half of the initial price for the services specified if the Project Authority cancels a Work Authorization without notifying the Standing Offer Holder at least 24 hours prior to the date and time of the work requested, or if the client fails to show up. Thus, the Contractor shall be paid half of the applicable initial price upon submission of a valid invoice in accordance with the payment terms and invoicing instructions indicated in the Standing Offer.
- 14.2 Should the Project Authority cancel a work authorization, the standing offer holder will be offered the next available call-up for which the Holder is qualified.

**15.0 Assessment Report Requirements:**

The Standing Offer Holder and/or the resource(s) must prepare one or more assessment reports for certain instruments and services, as established by the Project Authority.

Each report must usually be submitted to the Project Authority no later than the five (5) days after the integration (for assessment instruments) and must be delivered on USB key or by secure electronic mail (to be determined with and approved by the Project Authority) in an electronic format compatible with PSC systems and templates (Word). The Project Authority will confirm the deadline for report submission when the work is assigned to the standing offer holder.

Each report (and the accompanying notes, where applicable) submitted by the proposed resource will be systematically checked for quality and evaluated by the PSC psychologist responsible for the project, who will determine whether the report meets the following quality standards:

- the report is detailed;
- the report is complete;
- the report is impartial;
- the report does not contain any spelling or grammar errors;
- the report does not contain any confidential, protected or discriminatory information;
- the information contained in the report is directly and solely related to the dimensions assessed;
- the quantity, quality and depth of the information are sufficient to support the ratings.

Reports that do not meet the above standards will be considered incomplete and will be returned to the contractor who will be required to make the necessary changes with no additional charge to Canada.

**16.0 Place of Work and Travel:**

**A) ON SITE**

The training and orientation sessions described in this section and the quality assurance review meetings also described in this section will be conducted on-site at the PSC HQ, 22 Eddy Street, Gatineau QC.

Attendance at the initial training, shadowing and orientation sessions for each assessment instrument or service to be supplied and attendance to Quality Assurance (QA) review meetings shall be at the standing offer holder’s sole expense and at no cost to The Crown.

The standing offer holder and / or its resource(s) will be paid for attending the training sessions (other than the initial training, shadowing and orientation sessions for each assessment instrument or service to be supplied), in accordance with section 4 – Other Training Sessions of Appendix “H” – Basis of Payment of this standing offer.

The services will be provided on site (PSC premises) in the National Capital Region (NCR), unless otherwise specified by the project authority. The PSC will provide furnished, equipped offices (personal computer and access to the Division’s local network will be subject to the usual security requirements) where necessary, as determined by the Project Authority.

**B) TRAVEL**

No travel is provided for in this request for standing offers. If travel proves necessary, it will be subject to prior approval by the Project Authority and must be in accordance with Treasury Board directives. The PSC will not pay for travel within the NCR.

**17.0 Security Requirements – Standing Offer:**

The Contractor/Offeror personnel requiring access to PROTECTED information, assets or work site(s) must EACH hold a valid **RELIABILITY STATUS**, granted or approved by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC) or the PSC.

The Contractor may not transmit Protected B data by e-mail or any other alternative method of electronic delivery, unless it complies with the encryption standards approved by the Public Service Commission (PSC). All protected information must be submitted in person or sent by mail, in a double envelope, with the required security level specified on the inside envelope and only the addresses of the addressee and the sender showing on the outside envelope.

The Contractor **MAY NOT** save or copy any of the information, including working copies, on his/her computer hard drives. He/she must save all information, including working copies and all deliverables, in **an encrypted USB key provided by the PSC**, which will then be sent to the PSC.

The Contractor must have the appropriate capacity and equipment to safeguard protected information in accordance with the Operational Security Standard on Physical Security of the TBS. <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12329&section=text>

NO subcontracts with security requirements may be awarded without the prior written consent of the PSC.

**18.0 Confidentiality and Material:**

- 18.1 The Contractor shall keep confidential all information provided to the Contractor by or on behalf of Canada in connection with the Work, including any information that is confidential or proprietary to third parties. The Contractor shall not disclose any such information to any person without the written permission of the PSC, except that the Contractor may disclose to a subcontractor authorized by the PSC, information necessary for the performance of the Subcontract, on the condition that the subcontractor agrees that it will be used solely for the purposes of such Subcontract. Information provided to the Contractor by or on behalf of Canada shall be used solely for the purpose of the Contract and shall remain the property of Canada or the third party, as the case may be. Unless the Contract otherwise expressly provides, the Contractor shall deliver to Canada all such information, together with every copy, draft, working paper and note thereof that contains such information, upon completion or termination of the Contract or at such earlier time .
- 18.2 When the Contract, the Work, or any information referred to in subsection 18.1 is identified as PROTECTED by Canada, the Contractor shall at all times take all measures reasonably necessary for the safeguarding of the material so identified, including those set out in the PWGSC Industrial Security Manual and its supplements and any other instructions issued by the PSC.
- 18.3 Without limiting the generality of subsections 18.1 and 18.2, when the Contract, the Work, or any information referred to in subsection 18.1 is identified as PROTECTED by Canada, the PSC shall be entitled to inspect the Contractor's premises and the premises of a subcontractor at any tier for security purposes at any time during the term of the Contract, and the Contractor shall comply with, and ensure that any such subcontractor complies with, all written instructions issued by the PSC dealing with the material so identified, including any requirement that employees of the Contractor or of any such subcontractor execute and deliver declarations relating to reliability screenings, security clearances and other procedures.

**19.0 Restrictions on the use of materials provided by the Crown**

- a) The contractor acknowledges and agrees that any and all materials and information provided by the Crown to the contractor in the context of this Standing Offer and its resulting work, are the exclusive property of the Crown and cannot be shared with any third party (private or public) or used outside the context of this Standing Offer and its resulting work without the express written permission of the Public Service Commission (PSC).
- b) These materials and information include but are not limited to assessment tools, materials provided to assist in the administration of the assessment tools, test simulation binders, documentation (e.g. handouts, sample questions, competency profiles) used as aids to coaching clients, as well as information and materials provided to the contractor by the PSC as part of training sessions given in support of this Standing Offer and its resulting work.

**20.0 Intellectual Property:**

Other than what is specifically provided for in this Standing Offer, any intellectual property arising from the performance of the services described herein shall vest with the Contractor.

**21.0 Green Procurement:**

The contractor will make every effort to ensure that all documents prepared or delivered are printed double-sided on Ecology certified recycled paper or on paper with equivalent post-consumer recycled content.

## APPENDIX “E” - Quality Assurance Monitoring Report

<b>Contractor’s Name:</b>	<b>Date:</b>
<b>Proposed resources Name:</b>	

<b>In-basket/Written Exercises</b> <ul style="list-style-type: none"> <li>• gives standardized instructions</li> <li>• uses proper marking scheme when scoring</li> <li>• appropriate explanations provided when necessary</li> </ul>	Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> Non Applicable <input type="checkbox"/>	<b>Comments</b>
<b>Group Discussion / Individual Meetings Presentation / Question Period</b> <ul style="list-style-type: none"> <li>• observes attentively</li> <li>• asks standardized questions</li> <li>• takes verbatim notes</li> <li>• follows standardized instructions and guidelines</li> </ul>	Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> Non Applicable <input type="checkbox"/>	<b>Comments</b>
<b>Interview (in person or by telephone)</b> <ul style="list-style-type: none"> <li>• uses proper tone and standardized questions</li> <li>• asks effective probing questions</li> <li>• takes verbatim notes</li> <li>• verbal and non-verbal cues indicate attention</li> </ul>	Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> Non Applicable <input type="checkbox"/>	<b>Comments</b>
<b>Role Play</b> <ul style="list-style-type: none"> <li>• uses standardized scripts and prompts when appropriate</li> <li>• communicates clearly</li> <li>• proper tone</li> <li>• takes appropriate notes</li> <li>• responds adequately</li> <li>• modifies interactions appropriately</li> </ul>	Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> Non Applicable <input type="checkbox"/>	<b>Comments</b>
<b>Summary Sheets</b> <ul style="list-style-type: none"> <li>• provides appropriate behavioural examples</li> <li>• sufficient information on sheets</li> <li>• no biased information or impressions</li> <li>• checks indicate demonstrated, observed behaviours</li> </ul>	Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> Non Applicable <input type="checkbox"/>	<b>Comments</b>
<b>Integration</b> <ul style="list-style-type: none"> <li>• proper use of behavioural indicators</li> <li>• constructive/collegial contribution to consensus</li> <li>• ratings are justified</li> <li>• provides relevant developmental recommendations when required</li> </ul>	Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> Non Applicable <input type="checkbox"/>	<b>Comments</b>

<p><b>Reports/Notes</b></p> <ul style="list-style-type: none"> <li>• detailed, complete, impartial</li> <li>• no spelling or grammar mistakes (for reports)</li> <li>• no protected or discriminatory information</li> <li>• deals effectively with dimensions/competencies assessed</li> </ul>	<p>Satisfactory <input type="checkbox"/></p> <p>Unsatisfactory <input type="checkbox"/></p> <p>Non Applicable <input type="checkbox"/></p>	<p><b>Comments</b></p>
<p><b>Feedback/Consultation</b></p> <ul style="list-style-type: none"> <li>• gives useful information and advice</li> <li>• adapts to client interests</li> <li>• appropriate balance between structure and adaptation to client needs</li> <li>• elicits client solutions</li> <li>• provides constructive critique</li> </ul>	<p>Satisfactory <input type="checkbox"/></p> <p>Unsatisfactory <input type="checkbox"/></p> <p>Non Applicable <input type="checkbox"/></p>	<p><b>Comments</b></p>
<p><b>Professional Courtesy and Demeanour</b></p> <ul style="list-style-type: none"> <li>• maintains harmonious relations with peers, and clients (departmental clients, candidates, PPC and PSC staff)</li> <li>• adopts a collegial approach with co-workers</li> <li>• shows sensitivity</li> <li>• makes tactful and respectful comments</li> <li>• professional behaviour</li> <li>• meets deadlines</li> <li>• shows discretion</li> <li>• keeps appointments</li> </ul> <p><b>Quality of Client Contacts</b></p> <ul style="list-style-type: none"> <li>• empathy, genuine attention</li> <li>• adapts to client level and needs</li> <li>• respectful</li> <li>• appropriately balances support and challenges</li> </ul> <p><b>Teamwork</b></p> <ul style="list-style-type: none"> <li>• maintains positive relations with peers and staff</li> <li>• performs administrative tasks</li> <li>• open to guidance from PPC staff</li> <li>• appropriate balance between autonomy and consultation in service delivery</li> <li>• contributes to service development</li> </ul> <p><b>Current Knowledge</b></p> <ul style="list-style-type: none"> <li>• takes initiative to update knowledge of Public Service environment</li> <li>• shares knowledge</li> <li>• keeps specialized knowledge current</li> </ul>	<p>Satisfactory <input type="checkbox"/></p> <p>Unsatisfactory <input type="checkbox"/></p> <p>Non Applicable <input type="checkbox"/></p>	<p><b>Comments</b></p>

<b>Other comments</b>
<b>Proposed Corrective Measures</b>

<b>Project Authority / PPC Delegate Name:</b>	<b>Date:</b>
<b>Project Authority / PPC Delegate Signature:</b>	
<b>Feedback provided by:</b>	<b>Date:</b>
<b>Proposed resource' signature*:</b>	<b>Date:</b>
<b>Contractor's signature*:</b>	<b>Date:</b>

\* Signature to confirm that Standing Offer Holder and/or its resource(s) have received information and feedback regarding this Quality Assurance Monitoring Report

## APPENDIX “F” - General Conditions – Standing Offers – Goods or Services

- 01 Interpretation
- 02 General
- 03 Standard Clauses and Conditions
- 04 Bid
- 05 Call-ups
- 06 Withdrawal
- 07 Revision
- 08 Disclosure of Information
- 09 Integrity Provision

### 01 Interpretation

In the Standing Offer, unless the context otherwise requires,

"Call-up" means an order issued by the Call-up Authority duly authorized to issue a Call-up against a particular Standing Offer. Issuance of a Call-up to the Contractor constitutes acceptance of its Bid and results in the creation of a contract between Her Majesty the Queen in right of Canada and the Contractor for the goods, services or both described in the Call-up;

"Canada", "Crown", "Her Majesty" or "the Government" means Her Majesty the Queen in right of Canada as represented by the Public Service Commission.

"Bidder" means the person or entity whose name appears on the signature page of the Standing Offer and who bids to provide goods, services or both to Canada under the Standing Offer;

"Contractor" or "Standing Offer Holder" means the person or entity whose name appears on the signature page of the Standing Offer and who bids to provide goods, services or both to Canada under the Standing Offer;

"Standing Offer" means the written bid from the Contractor, the clauses and conditions, these general conditions, Appendixes and any other document specified or referred to as forming part of the Standing Offer;

"Standing Offer Authority" means the person designated as such in the Standing Offer, or by notice to the Contractor, to act as the representative of Canada in the management of the Standing Offer.

### 02 General

The Contractor acknowledges that a Standing Offer is not a contract and that the issuance of a Standing Offer and Call-up Authority does not oblige or commit Canada to procure or contract for any goods, services or both listed in the Standing Offer. The Contractor understands and agrees that Canada has the right to procure the goods, services or both specified in the Standing Offer by means of any other contract, Standing Offer or contracting method.

### 03 Standard Conditions and Clauses

Pursuant to the *Department of Public Works and Government Services Act*, S.C. 1996, c.16, the clauses and conditions identified in the Standing Offer by number, date and title are incorporated by reference and form part of the Standing Offer and any contract resulting from the Standing Offer as though expressly set out in the Standing Offer and resulting contract.

### 04 Bid

1. The Contractor offers to provide and deliver to Canada the goods, services or both described in the Standing Offer, in accordance with the pricing set out in the Standing Offer as and when the PSC may request such goods, services or both, in accordance with the conditions listed at sub-section 2 below.

2. The Contractor understands and agrees that:

- (a) a Call-up against the Standing Offer will form a contract only for those goods, services, or both, which have been called-up, provided that such Call-up is made in accordance with the provisions of the Standing Offer;
- (b) Canada's liability is limited to that which arises from Call-ups against the Standing Offer made within the period specified in the Standing Offer;
- (c) the Standing Offer cannot be assigned or transferred in whole or in part;
- (d) the Standing Offer may be set aside by Canada at any time.

### **05 Call-ups**

The PSC will use the form specified in the Standing Offer to order services. They may also be ordered by other methods such as telephone, facsimile or electronic means. Typically, the Standing Offer Holder will be given a written statement of the work that is requested, along with a maximum time or funding allotted for this work. Call-ups will be provided to the contractors on a monthly basis, following the completion of this previously authorised work. Call-ups made by telephone must be confirmed in writing on the document specified in the Standing Offer.

Call-ups against the Standing Offer paid for with the Government of Canada acquisition card (credit card) at point of sale must be accorded the same prices and conditions as any other Call-up.

### **06 Withdrawal**

In the event that the Contractor wishes to withdraw the Standing Offer after authority to Call-up against the Standing Offer has been given, the Contractor must provide no less than thirty (30) days written notice to the Standing Offer Authority, unless specified otherwise in the Standing Offer. The thirty (30) day period will start upon receipt of the notification by the Standing Offer Authority and the withdrawal will be effective at the expiry of that period. The Contractor must fulfill any and all Call-ups which are made before the expiry of that period.

### **07 Revision**

The period of the Standing Offer may only be extended, or its usage increased, by the Standing Offer Authority issuing a revision to the Standing Offer in writing.

### **08 Disclosure of Information**

The Contractor agrees to the disclosure of its Standing Offer unit prices or rates by Canada, and further agrees that it will have no right to claim against Canada, the PSC, their employees, agents or servants, or any of them, in relation to such disclosure.

## APPENDIX “G” - Standard Instructions – Request for Standing Offers – Goods or Services – Competitive Requirements

### Code of Conduct for Procurement

- 01 Standard Instructions, Clauses and Conditions
- 02 Definition of Bidder
- 03 Submission of Bids
- 04 Late Bids
- 05 Legal Capacity
- 06 Rights of Canada
- 07 Vendor Performance
- 08 Price Justification
- 09 Bid Costs
- 10 Conduct of Evaluation
- 11 Joint Venture
- 12 Conflict of Interest - Unfair Advantage
- 13 Entire Requirement
- 14 Further Information

To comply with the *Code of Conduct for Procurement* (<http://www.tpsgc-pwgsc.gc.ca/app-acq/cndt-cndct/index-eng.html>) Bidders must respond to Requests for Standing Offers (RFSOs) in an honest, fair and comprehensive manner, accurately reflect their capacity to satisfy the requirements stipulated in the RFSO and resulting contract, submit bids and enter into contracts only if they will fulfill all obligations of the contract.

To ensure fairness, openness and transparency in the bidding process, payment of a contingency fee by any party to a contract to a person to whom the *Lobbyists Registration Act*, R.S. 1985, c. 44 (4th Supplement) applies is prohibited.

By submitting a bid, the Bidder certifies that it meets the above requirements.

Bidders further understand that the commission of certain offences may render them ineligible to be awarded a contract. By submitting a bid, the Bidder declares that it has never been convicted of an offence under Section 121 (*Frauds on the government and Contractor subscribing to election fund*), Section 124 (*Selling or Purchasing Office*), Section 380 (*Fraud committed against Her Majesty*) or Section 418 (*Selling defective stores to Her Majesty*) of the Criminal Code of Canada, or under 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*.

### 01 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, Standing Offer and resulting contract(s) by number, date and title are incorporated by reference into and form part of the RFSO, Standing Offer and resulting contract(s) as though expressly set out in the RFSO, the Standing Offer and the resulting contract(s).

### 02 Definition of Bidder

"Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a Standing Offer to bid goods, services or both under a Call-up resulting from a Standing Offer. It also includes the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.

### **03 Submission of Bids**

1. Canada requires that each bid, at closing date and time or upon request from the Standing Offer Authority, be signed by the Bidder or by an authorized representative of the Bidder. If a bid is submitted by a joint venture, it must be in accordance with section 15.
2. It is the Bidder's responsibility to:
  - (a) obtain clarification of the requirements contained in the RFSO, if necessary, before submitting a bid;
  - (b) prepare its bid in accordance with the instructions contained in the RFSO;
  - (c) submit by closing date and time a complete bid;
  - (d) send its bid only to the PSC as specified on page 1 of the RFSO or to the address specified in the RFSO;
  - (e) ensure that the Bidder's name, return address, and RFSO number 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.
3. If Canada has provided Bidders with multiple formats of a document (for example, a document may be downloaded through the Government Electronic Tendering Service (GETS) but may also be made available on CD-ROM through GETS), the format downloaded through GETS will take precedence. If Canada posts an amendment to the RFSO revising any documents provided to Bidders in multiple formats, Canada will not necessarily update all formats to reflect these revisions. It is the Bidder's responsibility to ensure that revisions made through any RFSO amendment issued through GETS are taken into account in the alternate formats it uses of RFSO documents.
4. Bids will remain open for acceptance for a period of not less than ninety (90) days from the closing date of the RFSO, unless specified otherwise in the RFSO. Canada reserves the right to seek an extension of the bid validity period from all responsive Bidders in writing. If the extension is accepted by all responsive Bidders, Canada will continue with the evaluation of the bids. If the extension is not accepted by all responsive Bidders, Canada will, at its sole discretion, either continue with the evaluation of the bids of those who have accepted the extension or cancel the RFSO.
5. Bids and supporting information may be submitted in either English or French.
6. Bids received on or before the stipulated RFSO 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, Canada will evaluate only the documentation provided with a Bidder's bid. Canada will not evaluate information such as references to Website addresses where additional information can be found, or technical manuals or brochures not submitted with the bid.

### **04 Late Bids**

The PSC will return bids delivered after the stipulated RFSO closing date and time.

### **05 Legal Capacity**

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

## **06 Rights of Canada**

Canada reserves the right to:

- (a) reject any or all bids received in response to the RFSO;
- (b) enter into negotiations with Bidders on any or all aspects of their bids;
- (c) authorize for utilization any bid in whole or in part without negotiations;
- (d) cancel the RFSO at any time;
- (e) reissue the RFSO;
- (f) if no responsive bids are received and the requirement is not substantially modified, reissue the RFSO by inviting only the Bidders who submitted a bid to resubmit bids within a period designated by Canada; and
- (g) negotiate with the sole responsive Bidder to ensure best value to Canada.

## **07 Vendor Performance**

1. Other than has already been specified herein, Canada may reject a bid where any of the following circumstances is present:
  - (a) the Bidder, or any employee or subcontractor included as part of the bid, has been convicted under Section 121 (*Frauds on the government & Contractor subscribing to election fund*), Section 124 (*Selling or purchasing office*), Section 380 (*Fraud committed against Her Majesty*) or Section 418 (*Selling defective stores to Her Majesty*) of the Criminal Code or under 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*.
  - (b) the Bidder is subject to a Vendor Performance Corrective Measure, under the Vendor Performance Policy, which renders the Bidder ineligible to submit a bid for the requirement;
  - (c) an employee, or subcontractor included as part of the bid, is subject to a Vendor Performance Corrective Measure, under the Vendor Performance Policy, which would render that employee or subcontractor ineligible to submit an bid for the requirement, or the portion of the requirement the employee or subcontractor is to perform;
  - (d) with respect to current or prior transactions with the Government of Canada:
    - (i) the Bidder is bankrupt or where, for whatever reason, its activities are rendered inoperable for an extended period;
    - (ii) evidence, satisfactory to Canada, of fraud, bribery, fraudulent misrepresentation or failure to comply with any law protecting individuals against any manner of discrimination, has been received with respect to the Bidder, any of its employees or any subcontractor included as part of the bid;
    - (iii) Canada has exercised its contractual remedies of suspension or termination for default with respect to a contract with the Bidder, any of its employees or any subcontractor included as part of the bid;
    - (iv) Canada determines that the Bidder's performance on other contracts, including the efficiency and workmanship as well as the extent to which the Bidder performed the Work in accordance with contractual clauses and conditions, is sufficiently poor to jeopardize the successful completion of the requirement being bid on.
2. Where Canada intends to reject a bid pursuant to a provision of subsection 1, other than 1.(b), the Standing Offer Authority will so inform the Bidder and provide the Bidder ten (10) days within which to make representations, before making a final decision on the bid rejection.

## **08 Price Justification**

In the event that the Bidder's bid is the sole responsive bid received, the Bidder must provide, on Canada's request, one or more of the following price justifications:

- (a) a current published price list indicating the percentage discount available to Canada; or

- (b) a copy of paid invoices for the like quality and quantity of the goods, services or both sold to other customers; or
- (c) a price breakdown showing the cost of direct labour, direct materials, purchased items, engineering and plant overheads, general and administrative overhead, transportation, etc., and profit; or
- (d) price or rate certifications; or
- (e) any other supporting documentation as requested by Canada.

## **09 Bid Costs**

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

## **10 Conduct of Evaluation**

1. In conducting its evaluation of the bids, Canada may, but will have no obligation to, do the following:
  - (a) seek clarification or verification from Bidders regarding any or all information provided by them with respect to the RFSO;
  - (b) contact any or all references supplied by Bidders to verify and validate any information submitted by them;
  - (c) request, before issuance of any Standing Offer, specific information with respect to Bidders' legal status;
  - (d) conduct a survey of Bidders' facilities and/or examine their technical, managerial, and financial capabilities to determine if they are adequate to meet the requirements of the RFSO;
  - (e) correct any error in the extended pricing of bids by using unit pricing and any error in quantities in bids to reflect the quantities stated in the RFSO; in the case of error in the extension of prices, the unit price will govern.
  - (f) verify any information provided by Bidders through independent research, use of any government resources or by contacting third parties;
  - (g) interview, at the sole costs of Bidders, any Bidder and/or any or all of the resources proposed by Bidders to fulfill the requirement of the RFSO.

## **11 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. Bidders 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 name of the representative of the joint venture, i.e. the member chosen by the other members to act on their behalf, if applicable;
  - (c) the name of the joint venture, if applicable.
2. If the information is not clearly provided in the bid, the Bidder must provide the information on request from the Standing Offer Authority.
3. The bid and any resulting Standing Offer 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 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 and any resulting Standing Offer. If a Standing Offer is issued to a joint venture, all members of the joint venture will be jointly and severally or solidarity liable for the performance of any contract resulting from a Call-up against the Standing Offer.

## **12 Conflict of Interest - Unfair Advantage**

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

## **13 Entire Requirement**

The RFSO contains all the requirements relating to the solicitation. Any other information or documentation provided to or obtained by a Bidder from any source are not relevant. Bidders should not assume that practices used under previous contracts will continue, unless they are described in the RFSO. Bidders should also not assume that their existing capabilities meet the requirements of the RFSO simply because they have met previous requirements.

## **14 Further Information**

For further information, Bidders may contact the Standing Offer Authority identified in the RFSO.

**APPENDIX “H” - Basis of Payment**

To facilitate presentation, Bidders must complete and include this annex in their Financial Proposal for each proposed resource.

Name of Proposed resource: \_\_\_\_\_

Language streams of proposed resource		
<input type="checkbox"/> Stream A: Bilingual (English AND French)	<input type="checkbox"/> Stream B: English	<input type="checkbox"/> Stream C: French

For a bid to be deemed financially responsive, the Bidder must propose a firm overall all-inclusive price for EACH point (including items 01 to 13 and the per diem rate for item 14) below, NONE of which may exceed the corresponding MAXIMUM overall all-inclusive price and the per diem rate specified below. Any financial bid which exceeds the maximum indicated herein or which does not propose a price for each item shall be deemed non responsive and shall automatically be rejected

**1- Services related to assessment instruments**

The Bidder proposes the following Payment Schedule for administering the specified commonly used assessment instruments and all of their applicable tasks, including the preparation of an assessment report for items 2 to 8, but excluding the feedback session which is charged separately, for the Period of the Standing Offer.

For the First Option Period, the Second Option Period, and the Third Option Period, the Standing Offer Authority reserves the right to increase the Firm Batch Price proposed by the bidder up to a maximum of two percent (2%) per annum.

**Proposed payments must not exceed the Maximum Firm All-Inclusive Batch Price by Candidate**

Item	Assessment Instruments	MAXIMUM Firm All-Inclusive Batch Price per candidate assessed	PROPOSED Firm All-Inclusive Batch Price per candidate assessed
1	Simulations for the Selection of Executives (SELEX)	\$400	
2	Identification for Paths to EX (IPEX)	\$975	
3	Simulation Exercise for Senior Executives, Level 03	\$825	
4	Simulations for the Identification of Leadership (SIL)	\$650	
5	Identification of Middle Management Potential (IMMP)	\$625	
6	Candidate Achievement Record (CAR) for 1-2 competencies	\$130	
7	Candidate Achievement Record (CAR) for 3-4 competencies	\$200	
8	Candidate Achievement Record (CAR) for 5-7 competencies	\$305	
9	Simulations (Series 400, 700 and 800)	\$220	

10	Assessment report for Simulations (Series 400, 700 and 800)	\$175	
11	Assessment report type A or B for Simulations (Series 400, 700 and 800)	\$200	
12	360° Feedback	\$305	
13	Feedback session in a selection context	\$175	
14	Feedback session in a professional developmental context (i.e., includes a basic personality inventory)	\$260	

**2- Additional Instruments, Revised Instruments and Other Services**

The Bidder’s proposed all-inclusive per diem rate will apply for additional instruments, revised instruments and other services not included in Items 1 to 14 for the period of the Standing Offer.

The firm all-inclusive batch prices for additional or revised assessment instruments shall be determined using the following firm all-inclusive daily rate and an estimate by the project authority of the level of effort required.

A revised assessment instrument is defined as follows: changes to an existing assessment instrument that significantly increase or decrease the level of effort, as determined by the project authority.

The bidder understands and agrees that the firm all-inclusive price of any additional or revised assessment instrument takes effect ONLY when officially authorized in writing by the PSC standing offer authority.

<b>Item</b>	<b>Additional Instruments, Revised Instruments and Other Services</b>	<b>MAXIMUM All-Inclusive Per Diem Rate</b>	<b>Firm All-Inclusive Per Diem Rate</b>
15	Any other related services not included in items 1-14	\$675	

**3- Initial training and orientation sessions**

Bidders will NOT be remunerated for participating in the initial training, shadowing and orientation sessions for each assessment instrument or service to be supplied.

In the event that the resource does not render psychological personnel assessment services up to a standard deemed acceptable by the Project Authority and assessed by a Quality Assurance review for any given assessment instruments, the resource will be required to participate in a second training, shadowing and/or orientation session for that assessment instrument. Bidders will NOT be remunerated for participating in this second training, shadowing and/or orientation session. Resources who still do not meet acceptable standards after the second training, shadowing and/or orientation session, as assessed by a Quality Assurance review, will no longer be eligible for work offers for the assessment instrument in question.

Bidders will NOT be remunerated for the assessment of their proficiency in delivering a role play exercise – Appendix “J” – Role Play Training Exercise

#### 4. Other Training Sessions

Bidders will be remunerated for participating in training sessions (other than the initial training, shadowing and orientation sessions for each assessment instrument or service to be supplied and the Role Play training exercise), held in the National Capital Region, based on the applicable firm all-inclusive price given below, including travel and per diem expenses. These prices are established by the PSC, and are for the bidder's information only.

Item	Length of Other Training Session	Daily All-Inclusive Rate
16	2 days (15 hours)	\$650
17	1 day (7.5 hours)	\$325
18	Hourly Rate	\$86.67

Applicable taxes: \_\_\_\_\_ %

#### 4.1 Payments:

- 1) **A proposed payment rate for one or more of Items 1-15 that exceeds the maximum specified will make the proposal non-compliant.** The Bidder may offer less than the maximum payment and rate for any or all of Items 1 to 15.
- 2) Offered payment rates must be inclusive of all overhead, material, profit, payroll, administrative, costs, and other costs except for applicable taxes.
- 3) The rates stated within this RFSO are subject to increase at any time following Standing Offer award. Only the PSC can determine if the rates should be increased. In the event of a rate increase the changes shall be effected by a standing offer amendment.
- 4) All payments are subject to government audit.

#### 4.2 Definition of prorating a day:

A day is defined as 7.5 hours exclusive of meal breaks. Payment will be for days actually worked with no provision for annual leave, statutory holidays and sick leave. Time worked ("Days worked", in the formula below) which is less than a day will be prorated to reflect actual time worked in accordance with the following formula:

$$\text{Days worked} = \text{Hours Worked divided by } 7.5 \text{ hours per day}$$

#### 5. Evaluation Price

The Evaluation Price which will be used in the calculation of "Price per Evaluated Points" shall be the sum of the offered Payments and Rates for Items 1 to 15 above.

#### 6. Quality Assurance Reviews

The firm all-inclusive rates and prices stipulated in this RFSO include the bidder's participation in one or all of the quality assurance reviews.

**7. Travel and Per Diem Expenses**

- 1) The PSC will not pay travel and per diem expenses incurred by the bidder to attend training and orientation sessions, quality assurance reviews, assessments, feedback sessions or because staff members must relocate to meet the conditions of the standing offer or any resulting call-up contract made under it.
- 2) Travel and per diem expenses are INCLUDED in the prices and/or rates indicated above for all services requested and provided in the National Capital Region.
- 3) For services requested outside the National Capital Region, travel and per diem expenses are EXTRA. In such cases, the bidder will be paid reasonable and appropriate authorized travel and per diem expenses incurred in the performance of the work, at cost, without any additional compensation for overhead or profit margin, in accordance with the negotiated compensation for the use of a private vehicle, for meals and for incidental expenses specified in Appendix B, C, and D of the National Joint Council Travel Directive (<http://www.njc-cnm.gc.ca/directive/travel-voyage/index-eng.php>) and other provisions in the Directive pertaining to “travellers” rather than to “employees.”
- 4) All travel must be authorized in advance by the project authority.

## APPENDIX "I" - Security Requirements Check List (SRCL)



Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat <b>D1120-15-9001</b>
Security Classification / Classification de sécurité

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

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE		
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine <b>CFP</b>	2. Branch or Directorate / Direction générale ou Direction <b>SASB / PPC / Assessment Centre</b>	
3. a) Subcontract Number / Numéro du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail <i>- evaluation de candidats dans le cadre de processus de sélection ou de développement en ce qui a trait aux compétences</i> <i>- rétroaction aux candidats en ce qui a trait à leurs résultats au bureau d'évaluation</i>		
5. a) Will the supplier require access to Controlled Goods? / Le fournisseur aura-t-il accès à des marchandises contrôlées?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui	
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? / Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui	
6. Indicate the type of access required / Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? / Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) / Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)	<input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui	
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. / Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.	<input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui	
6. c) Is this a commercial courier or delivery requirement with no overnight storage? / S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui	
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	
Foreign / Étranger <input type="checkbox"/>		
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	
Not releasable / À ne pas diffuser <input checked="" type="checkbox"/>		
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	
Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:	
7. c) Level of information / Niveau d'information		
PROTECTED A / PROTÉGÉ A <input checked="" type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input checked="" type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET / SECRET <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET / SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité





Government of Canada / Gouvernement du Canada

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

**PART A (continued) / PARTIE A (suite)**

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?  
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS?  No / Non  Yes / Oui  
If Yes, indicate the level of sensitivity:  
Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?  
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?  No / Non  Yes / Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel :  
Document Number / Numéro du document :

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

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

<input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITÉ	<input type="checkbox"/> CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/> SECRET SECRET	<input type="checkbox"/> TOP SECRET TRÈS SECRET
<input type="checkbox"/> TOP SECRET - SIGINT TRÈS SECRET - SIGINT	<input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/> NATO SECRET NATO SECRET	<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET
<input type="checkbox"/> SITE ACCESS ACCÈS AUX EMPLACEMENTS			

Special comments:  
Commentaires spéciaux : \_\_\_\_\_

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.  
REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?  
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail?  No / Non  Yes / Oui  
If Yes, will unscreened personnel be escorted?  
Dans l'affirmative, le personnel en question sera-t-il escorté?  No / Non  Yes / Oui

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

**INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS**

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?  
Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS?  No / Non  Yes / Oui

11. b) Will the supplier be required to safeguard COMSEC information or assets?  
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC?  No / Non  Yes / Oui

**PRODUCTION**

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?  
Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?  No / Non  Yes / Oui

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

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?  
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS?  No / Non  Yes / Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?  
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale?  No / Non  Yes / Oui

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité





Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat

Security Classification / Classification de sécurité

**PART C - (continued) / PARTIE C - (suite)**

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

Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

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

Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

**SUMMARY CHART / TABLEAU RÉCAPITULATIF**

Category / Catégorie	PROTECTED / PROTÉGÉ			CLASSIFIED / CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET	NATO RESTRICTED / NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL / NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET / COSMIC TRÈS SECRET	PROTECTED / PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET / TRÈS SECRET
											A	B	C			
Information / Assets / Renseignements / Biens / Production	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>														
IT Media / Support TI																
IT Link / Lien électronique																

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

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

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

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

## APPENDIX “J” - Role Play Training Exercise

All resources will be evaluated in “**Proficiency in delivering a role play exercise**” in both English AND in French for Stream A, in English only for Stream B; or in French only for Stream C by going through a **Role Play Training Exercise**. A formal invitation will be sent by email to each Standing Offer Holder. The formal invitation will state the date and time of the Role Play Training Exercise. The Standing Offer Holder will have 48 hours (2 working days) to confirm the appointment. Should the time and date specified be unsuitable for the resource(s), the Standing Offer Holder must request an alternate date and time within the specified 48 hours (2 working days) time-frame. It is expected that the Role Play Training Exercise will be held **within one (1) month of standing offer award**. **All Role Play Training Exercise must be completed within two (2) months of standing offer award**, unless unforeseen circumstances occurs. The decision to extend the Role Play Training Exercise remains solely the PSCs, and the PSC is under NO obligation to grant an extension of the Role Play Training Exercise period requested by a Standing Offer Holder.

It is the Standing Offer Holder’s responsibility to ensure that the email address provided in the Proposal to the Public Service Commission is valid, and to communicate the scheduled time and date of the Role Play Training Exercise to its resource(s). Should a resource fail to be present for its scheduled Role Play Training Exercise due to unforeseen circumstances, the PSC may schedule a make-up Role Play Training Exercise date if the PSC deems it appropriate and/or the schedule allows it. The decision to schedule a make-up Role Play Training Exercise date remains solely the PSCs, and the PSC is under NO obligation to grant the make-up evaluation date.

Each resource must achieve a **PASS mark** in order to be able to receive services as described in their Standing Offer. Any resource who fails to participate in the Role Play Training Exercise will be awarded a FAIL mark, and will not be considered for work under the Standing Offer.

In their work with PPC, contractors are asked to carry out role play exercises where they play the role of a stakeholder within a fictitious organization who is meeting with the candidate who assumes the role of a manager or a director.

This role play training exercise assesses the bidder’s proficiency in delivering role play exercises in both English AND French for Stream A resources, in English only for Stream B resources, or in French only for Stream C resources.

## **Role play in English (Stream A and Stream B)**

### **Background**

You play the role of Pat LeBlanc, manager of a call centre unit within a fictitious public service organization. You have 20 employees whose responsibilities are to provide information to the Canadian public on government services that are available to them. You are meeting with a candidate who will assume the role of your Director.

As the manager of the call centre unit, you have asked to meet with your Director to discuss 2 issues: your staff's workload and flexible hours. The workload has increased significantly in the last three months; however, you were not able to staff additional positions due to budgetary constraints. Your employees are very tired and frustrated about the situation because of all the additional work and overtime they had to put in during the past months. In addition, you haven't been able to approve any requests for flexible hours from your employees in order to meet your operational requirements. This has led to even more frustration and low morale within your unit.

### **Instructions**

You MUST follow the script and pause after every line described in the script to provide the candidate with the opportunity to answer.

You MUST deliver all the lines described in the script, except when you are required to choose between 2 lines according to the candidate's answer.

**Attitude:** You feel overwhelmed and are asking for your Director's advice. Although you are upset with the situation, you must maintain a neutral approach during the role play.

## **SCRIPT**

### **Introduction**

Hello, I'm Pat Leblanc and thank you for agreeing to meet with me. *(Pause to allow the Director to respond)*

### **Workload issues**

I would like to discuss with you some workload issues we are facing in my unit. My staff is overwhelmed with work and have been doing a lot of overtime in the past three months in order to meet our deadlines. As you know, workload has significantly increased but we are not allowed to staff additional positions due to budgetary constraints. *(Pause to allow the Director to respond)*

Morale is quite low, absenteeism is higher and some employees are thinking of leaving the organization. I don't know what to do anymore. *(Pause to allow the Director to respond)*

I understand that there are budgetary constraints but I really need to hire at least 3 additional staff. Is there any way you can approve this? *(Pause to allow the Director to respond)*

**a) If the candidate agrees to hire additional staff, say:**

Thank you, this will be very helpful. My unit has the most work within our division. My colleagues, the managers of the 2 other units, don't have as much work and I think they should be contributing more. Could you write them an email asking for their help before the additional employees are actually in place? *(Pause to allow the Director to respond)*

**b) If the candidate does not agree to hire additional staff, say:**

My unit has the most work within our division. My colleagues, the managers of the 2 other units, don't have as much work and I think they should be contributing more. Could we get 3 of their employees to be on assignment in my unit? *(Pause to allow the Director to respond)*

**a) If candidate's answer is positive (e.g., agrees to write email, agrees to assignments), say:**

Thank you very much for your understanding. I appreciate your support.

**b) If candidate is undecided (e.g., candidate will think about it, need more information), say:**

Thank you for considering this and I hope we'll be able to get more help soon.

**c) If candidate's answer is negative, say:**

Although I'm disappointed., I understand. I'll do my best to find other solutions to these issues and will get back to you.

**Flexible hours issues**

I would like to discuss another important issue. Many of my employees are asking for flexible hours which I used to be able to approve. In the last 3 months, I had to refuse some requests due to operational requirement. As workload increases, we need more staff to be available during our business hours from 8:30 a.m. to 4:30 p.m. This has created even more frustration for my staff. *(Pause to allow the Director to respond)*

I find it important to promote work-life balance, but it's just not possible to properly balance the needs of my employees and those of the organization anymore. What do you think I should do? *(Pause to allow the Director to respond)*

I'm looking at the time and I have to attend another meeting. Thank you for your time.

## Role play in French (Stream A and Stream C)

### CONTEXTE

Vous jouez le rôle de Pat Leblanc, gestionnaire d'un centre d'appels au sein d'une organisation publique fictive. Vous avez 20 employés qui sont responsables de fournir de l'information au public canadien au sujet de divers services gouvernementaux qui leurs sont disponibles. Vous rencontrez un candidat ou une candidate qui jouera le rôle de votre directeur ou directrice.

Comme gestionnaire de l'unité des centres d'appels, vous avez demandé à votre directeur ou directrice de vous rencontrer pour discuter de deux enjeux: la charge de travail de vos employés et les heures flexibles. La charge de travail a augmenté significativement depuis les derniers trois mois. Cependant, vous ne pouviez pas doter des postes additionnels compte tenu des contraintes budgétaires. Vos employés sont très fatigués et frustrés de la situation car ils ont dû faire beaucoup de travail additionnel et de temps supplémentaire dans les derniers mois. De plus, vous n'avez pas pu approuver plusieurs demandes pour des horaires flexibles afin de rencontrer vos objectifs opérationnels. Ceci a créé encore plus de frustration et un moral bas au sein de votre unité.

### Directives

Vous DEVEZ suivre le script et une faire pause après chaque réplique décrite dans le script afin donner l'occasion au candidat de répondre.

Vous DEVEZ lire toutes les répliques décrites dans le script, sauf si vous êtes tenus de choisir entre 2 répliques en fonction de la réponse du candidat.

**Attitude:** vous vous sentez dépassé et vous demandez des conseils à votre de directeur. Même si vous êtes en frustré par la situation, vous devez adopter une approche neutre pendant le jeu de rôle.

## SCRIPT

### Introduction

Bonjour, je suis Pat Leblanc. Merci d'avoir accepté de me rencontrer. *(Faire une pause pour donner l'occasion au Directeur de répondre)*

### Enjeux liés à la charge de travail

Je voudrais discuter avec vous de certains problèmes liés à la charge de travail dans mon unité. Mes employés sont débordés de travail; ils ont dû faire beaucoup d'heures supplémentaires au cours des trois derniers mois afin de respecter nos délais. Comme vous le savez, la charge de travail a considérablement augmenté, mais nous ne sommes pas autorisés à doter des postes supplémentaires en raison de contraintes budgétaires. *(Faire une pause pour donner l'occasion au Directeur de répondre)*

Le moral est très bas, l'absentéisme augmente et certains employés songent à quitter l'organisation. Je ne sais pas quoi faire. *(Faire une pause pour donner l'occasion au Directeur de répondre)*

Je comprends qu'il ya des contraintes budgétaires, mais j'ai vraiment besoin d'embaucher au moins 3 employés supplémentaires. Pouvez-vous approuver ceci? *(Faire une pause pour donner l'occasion au Directeur de répondre)*

**a) Si le candidat consent à embaucher du personnel supplémentaire, dites:**

Merci, ce sera très utile. Mon unité est la plus occupée au sein de notre division. Mes collègues, les gestionnaires des 2 autres unités n'ont pas autant de travail et je pense qu'ils devraient contribuer davantage. Pourriez-vous leur envoyer un courriel les demandant de l'aide jusqu'à ce que les nouveaux employés soient embauchés? *(Faire une pause pour donner l'occasion au Directeur de répondre)*

**b) Si le candidat ne consent pas à embaucher du personnel additionnel, dites :**

Mon unité est la plus occupée au sein de notre division. Mes collègues, les gestionnaires des 2 autres unités n'ont pas autant de travail et je pense qu'ils devraient contribuer davantage. Pourrions-nous offrir une affectation dans mon unité à 3 de leurs employés?

**a) Si le candidat répond affirmativement (p. ex., consent à envoyer le courriel, consent aux affectations), dites :**

Merci beaucoup de votre compréhension, j'apprécie votre soutien.

**b) Si candidate demeure indécis (p. ex., le candidat veut y penser, a besoin de plus d'information) dites :**

Merci de considérer cette question et j'espère que nous serons en mesure d'obtenir plus d'aide sous peu.

**c) Si le candidat répond négativement, dites :**

Bien que je sois déçu, je comprends. Je ferai de mon mieux pour trouver d'autres solutions à ces questions et je vous tiendrai au courant.

**Enjeux liés aux heures flexibles**

Je voudrais aborder un autre problème important. Beaucoup de mes employés demandent des heures flexibles que j'ai l'habitude d'être en mesure d'approuver. Au cours des 3 derniers mois, j'ai dû refuser certaines demandes en raison de besoins opérationnels. Puisque la charge de travail augmente, nous avons besoin qu'un plus grand nombre d'employés soient présents pendant nos heures d'ouverture de 8h30 à 16h30. Ceci entraîne encore plus de frustration pour les membres de mon équipe. *(Faire une pause pour donner l'occasion au Directeur de répondre)*

Je trouve qu'il est important de promouvoir l'équilibre travail-vie personnelle, mais ce n'est simplement plus possible d'équilibrer les besoins de mes employés et ceux de l'organisation. Selon vous, que dois-je faire? *(Faire une pause pour donner l'occasion au Directeur de répondre)*

Il est tard et je dois assister à une réunion. Merci d'avoir pris le temps de me rencontrer.

<b>Role Play Evaluation (Stream A and Stream B)</b>			
<b>Role Play in English</b>			
1	Speaks clearly when saying the lines from the script	Does not speak clearly when saying the lines from the script (e.g., mumbles, talks too low)	PASS/FAIL
2	Followed the script by saying all the lines and pausing after each lines and did not add irrelevant information	Did not always follow the script or paused after each line or added irrelevant information	PASS/FAIL
3	Used the appropriate lines when required to adapt to the candidate's answer	Did not use the appropriate lines when required to adapt to the candidate's answer	PASS/FAIL
4	Used a proper neutral tone as per the instructions	Used an inappropriate tone or an overly upset or angry tone during the role play	PASS/FAIL
Each resource proposed for Stream A and Stream B must achieve a <b>PASS mark for all evaluated criteria in English (1 through 4) in</b> order to be assigned work under the Standing Offer.			

<b>Role Play Evaluation (Stream A and Stream C)</b>			
<b>Role Play in French</b>			
1	Speaks clearly when saying the lines from the script	Does not speak clearly when saying the lines from the script (e.g., mumbles, talks too low)	PASS/FAIL
2	Followed the script by saying all the lines and pausing after each lines and did not add irrelevant information	Did not always follow the script or paused after each line or added irrelevant information	PASS/FAIL
3	Used the appropriate lines when required to adapt to the candidate's answer	Did not use the appropriate lines when required to adapt to the candidate's answer	PASS/FAIL
4	Used a proper neutral tone as per the instructions	Used an inappropriate tone or an overly upset or angry tone during the role play	PASS/FAIL
Each resource proposed for Stream A and Stream C must achieve a <b>PASS mark for all evaluated criteria in French (1 through 4) in</b> order to be assigned work under the Standing Offer.			

ANNEXE « K » Invoice Template<sup>12</sup>

**NOM DU CONTRACTUEL/CONTRACTOR'S NAME**

Adresse du contractuel/Contractor's address

Facture / Invoice # : XXXXX	Commission de la fonction publique / Public Service Commission Centre de psychologie du personnel / Personnel Psychology Centre Centres d'évaluation / Assessment Centres 22 Eddy, pièce / room 2080 Gatineau, QC K1A 0M7
Période / Period : XXXXX	
Date : XXXXX	
# O.C. / S. O. #: XXXXX	

Date	Description des services / Service Description	Items	Frais / Rate	Quantité / Quantity	Total
<b>Sous-total / Subtotal</b>					
# xxxxxxxxxxxx TVH / HST					
<b>Total</b>					

<sup>1</sup> An invoice is to be provided at the end of the month, for work completed within that same month.

<sup>2</sup> This is an invoice template . An Excel worksheet with a drop down menu showing the assessment tools will be provided to contractors to use as an invoice.

## APPENDIX “L” – Confidentiality Policy and Agreement

### Confidentiality Agreement

WHEREAS the undersigned has been hired by the Public Service Commission of Canada (PSC) to perform work duties for the PSC;

AND WHEREAS the undersigned, in carrying out the duties, may have access to sensitive and/or proprietary information (“Information”);

THEREFORE, the undersigned undertakes and agrees as follows:

1. The undersigned agrees to treat as confidential the Information communicated to him/her and agrees not to disclose the Information to any other person.
2. The confidentiality obligation imposed by section 1 shall not apply where:
  - (a) the Information was known to the undersigned prior to disclosure by PSC;
  - (b) the Information is, at time of disclosure, part of the public domain;
  - (c) the Information, after the time of disclosure, becomes part of the public domain other than by disclosure by the undersigned;
  - (d) the Information is the same as information that has come to the undersigned by a third party who is not under a similar agreement or obligation of confidentiality to PSC;
  - (e) the undersigned is required to disclose the Information by law, including pursuant to an order of a court of competent jurisdiction; or
  - (f) PSC has approved the disclosure of the Information.

IN WITNESS WHEREOF the undersigned has executed this undertaking this \_\_\_\_\_ day of \_\_\_\_\_ 2016.

*THE UNDERSIGNED*

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Name (print)**

\_\_\_\_\_  
**Date**

**APPENDIX “M”**

**Resource Information Sheet**

The Bidder MUST include a completed Resource Information Sheet for every proposed resource in its’ Technical Proposal.

Name of Proposed Resource: \_\_\_\_\_

Area(s) of specialization of the proposed resource:

Identify in which language the proposed resource wishes to offer its services, as per the Language Certification (section 1.6 of Part 4) signed by the Bidder (mandatory):		
<input type="checkbox"/> Stream A: Bilingual (English AND French)	<input type="checkbox"/> Stream B: English	<input type="checkbox"/> Stream C: French

Within which of the following groups does the proposed resource self-identify (optional):		
<input type="checkbox"/> Male	<input type="checkbox"/> Female	<input type="checkbox"/> Persons with Disability
<input type="checkbox"/> Visible Minority	<input type="checkbox"/> Aboriginal	

**DIVERSITY & SENSITIVITY**

Identify with which of the following group(s) the proposed resource has assessment work experience (optional):		
<input type="checkbox"/> Female	<input type="checkbox"/> Persons with Disability	<input type="checkbox"/> Francophone
<input type="checkbox"/> Visible Minority	<input type="checkbox"/> Aboriginal	<input type="checkbox"/> Anglophone