

REQUEST FOR STANDING OFFERS
EXECUTIVE COUNSELLING SERVICES
FOR
THE PUBLIC SERVICE COMMISSION OF CANADA

Solicitation Date: November 26, 2018

CLOSING DATE AND TIME: January 8, 2019 at 2:00 p.m. EASTERN STANDARD TIME

Standing Offer Authority: **Angèle Fortier-Renaud**

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(The Standing Offer Authority is responsible for establishing and administering the contract.)

Proposal Submission:

Submit your proposal to the Public Service Commission, at one of the following addresses:

For delivery by courier services:

Bid Receiving
SOLICITATION NUMBER: D1120-18-2002
Public Service Commission c/o SCI
(Angèle Fortier-Renaud, 12th Floor, Room 12017)
2303 Stevenage Drive
Ottawa, ON
K1G 3W1

For in-person drop-off :

Bid Receiving
SOLICITATION NUMBER: D1120-18-2002
Public Service Commission
Procurement Services
22 Eddy Street, 12th 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.

Table of Contents

PART 1 - GENERAL INFORMATION.....	5
1.1 Summary	5
1.2 Security Requirement	5
1.3 Interpretation	5
1.4 Office of the Procurement Ombudsman (OPO)	5
PART 2 – BIDDER INSTRUCTIONS.....	6
2.1 Standard Instructions, Clauses and Conditions	6
2.2 Aboriginal Suppliers - Self-identification	6
2.3 Submission of Bids.....	6
2.4 Inquiries – Request for Standing Offers	8
2.5 Applicable Laws.....	8
PART 3 – EVALUATION PROCEDURES AND BASIS OF SELECTION	9
3.1 Evaluation Procedures.....	9
3.2 Selection for Standing Offers	9
3.3 Definitions.....	9
3.4 Mandatory Proposal Criteria	10
3.5 Mandatory Technical Criteria.....	11
3.6 Financial Evaluation.....	13
3.7 Basis of Selection	13
PART 4 – CERTIFICATIONS.....	15
4.1 Certifications Precedent to Issuance of a Standing Offer	15
4.2 Federal Contractors Program for Employment Equity - Standing Offer Certification	15
4.3 Former Public Servant Certification.....	15
4.4 Status and Availability of Resources.....	17
4.5 Conflict of Interest	17
4.6 Certificate of Independent Bid Determination	17
4.7 Language Proficiency.....	18
4.8 Main Region(s) of Work	19
4.9 Resource Information Sheet	19
4.10 Certification of education and experience	19
PART 5 - STANDING OFFER AND RESULTING CONTRACT CLAUSES.....	20
A. STANDING OFFER	20
1. Bid.....	20
2. Standard Clauses and Conditions	20
3. Period of Standing Offer	20
4. Authorities.....	20
5. Call-up Procedures – Allocation of Work	20
6. Call-up Instrument / Work Authorization	21

7.	Limitation of Call-ups	21
8.	Cancellation of Work Authorization	22
9.	Priority of Documents	22
10.	Status and Availability of Resources.....	22
11.	Closure of Government Offices.....	22
B.	RESULTING CONTRACT CLAUSES (FOR CALL-UP).....	23

LIST OF APPENDIXES

APPENDIX “A” - GENERAL CONDITIONS OF A SERVICE CONTRACT	23
APPENDIX “B” - SUPPLEMENTARY CONDITIONS OF A SERVICE CONTRACT	23
APPENDIX “C” - TERMS OF PAYMENT OF A SERVICE CONTRACT.....	23
APPENDIX “D” - STATEMENT OF WORK.....	24
APPENDIX “E” - GENERAL CONDITIONS – STANDING OFFERS – GOODS OR SERVICES	29
APPENDIX “F” - STANDARD INSTRUCTIONS – REQUEST FOR STANDING OFFERS – GOODS OR SERVICES – COMPETITIVE REQUIREMENTS	31
APPENDIX “G” - BASIS OF PAYMENT	36
APPENDIX “H” - SECURITY REQUIREMENTS CHECK LIST (SRCL)	38
APPENDIX “I” - RESOURCE INFORMATION SHEET	41
APPENDIX “J” - CONFIDENTIALITY AGREEMENT	45

**Proposal to the Public Service Commission
Bidder Information and Authorization**

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

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

1.1 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 **Executive Counselling Services** on an “as and when requested” basis for a period commencing on the date of the Standing Offer Authorization and terminating **two (2)** year later, 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. 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.

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-European Union Comprehensive Economic and Trade Agreement (CETA), the Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Colombia Free Trade Agreement (CCOFTA), the Comprehensive Economic and Trade Agreement (CETA) and the Canadian Free Trade Agreement (CFTA).

1.2 Security Requirement

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 “H”;
- b) The Bidder **MUST** provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites; and
- c) The PSC will not delay the issuance of any Standing Offer to allow bidders to obtain the required clearance.

1.3 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.

1.4 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. You can also obtain more information on the OPO services available to you at their website at www.opo-boa.gc.ca.

PART 2 – BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

The attached 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, Appendix “D”- Statement of Work, Appendix “E”- General Conditions – Standing Offers – Goods or Services, Appendix “F”- Standard Instructions – Request for Standing Offers – Goods or Services – Competitive Requirements, Appendix “G”- Basis of Payment, Appendix “H” – Security Requirements Check List, Appendix “I” – Resource Information Sheet and Appendix “J” – Confidentiality Agreement, 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.

2.2 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.

2.3 Submission of Bids

Bidders **MUST** submit **4 copies** of the **Technical Proposal** and **1 copy** of the **Financial Proposal** to the Public Service Commission (see page 1 for complete address) no later than **January 8, 2019, 2:00 PM Eastern Standard 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 Part 2 – Bidder Instructions. **Proposals will not be accepted after 2:00 PM Eastern Standard 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 3 – Evaluation Procedures and Basis of Selection.

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.**

2.3.1 Bid Preparation Instructions

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

- a) Section I: Technical Bid (**4 hard copies**)
- b) Section II: Financial Bid (**1 hard copy**)
- c) Section III: Certifications (PART 4) (**4 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 the bid.

2.3.2 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

The Technical Proposal must demonstrate compliance with all mandatory proposal requirements and must demonstrate how each proposed resource meets the mandatory technical requirements set out in PART 3 – Evaluation Procedures and Basis of Selection. The Technical Proposal must respond to each of the Mandatory 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 should use the tables provided in order to provide a structured response. Sufficient details including dates, titles, functions, activities, achievements and degrees, etc., must be provided to demonstrate that the requirement is met. Failure to provide sufficient details may result in a non-compliant proposal. Bidders **MUST** include a curriculum vitae (CV) or résumé of a proposed resource to provide a summary of the qualifications and experience of the individual.

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

2.3.3 Section II: Financial Bid

Bidders **MUST** submit their Financial Bid in accordance with the Appendix “G” - Basis of Payment. The total amount of Goods and Services Tax, Quebec Sales Tax, Provincial Sales Tax or Harmonized Sales Tax is to be shown separately, if applicable.

Bidders **MUST** propose:

- a Firm All-inclusive Hourly Rate for Executive Counselling Services that does not exceed the **MAXIMUM All-inclusive Hourly Rate of \$110.00**.

Attendance at the Orientation Session or at team meetings described in Appendix “D” – Statement of Work shall be at no expense to The Crown.

For ease of submission, Bidders may complete the table in Appendix “G” - Basis of Payment as part of its Financial Proposal.

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.

2.4 Inquiries – 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 the Backup)** named on page 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. The 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.

2.5 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

3.1 Evaluation Procedures

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

Evaluation Process:

The evaluation will be conducted in two steps:

Step 1: Proposals will be evaluated to ensure compliance with the Mandatory Proposal Requirements.

After a proposal has been determined to be compliant, each proposed resource will be evaluated individually, independent of any other proposed resource included in the proposal in Step 2.

Step 2: The information submitted for each proposed resource by the Bidder in its proposal will be evaluated for compliance with the **Mandatory Technical Requirements**. Where a response does not adequately respond to a Mandatory Technical Requirement, the individual proposed resource will not be considered further. Failure of one proposed resource offered in a proposal will not impact the evaluation of any of the other proposed resources.

Bidders are reminded that they **MUST** respond to each Mandatory Requirement sufficiently to demonstrate compliance. Requirements that are not addressed will be deemed as not meeting the Mandatory criteria. Dates, position titles, functions, organizations must be specified and described in sufficient detail to enable a full evaluation.

3.2 Selection for Standing Offers

The Public Service Commission will award up to 60 Standing Offers for Executive Counselling services, in the manner described in section 3.7 – Basis of Selection.

3.3 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. The term “**managerial responsibilities**” includes managing projects, operations or deliverables, as well as a budget and human resources.
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.
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.

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.).
5. The term “**organization**” includes companies, corporations, 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.
6. “**Employed**” does not count acting appointments toward the experience required for mandatory requirements.
7. A “**year**” means 12 consecutive or cumulative months, as specified, for the purposes of mandatory requirements.

3.4 Mandatory Proposal Criteria

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

3.4.1 – Mandatory Proposal Requirements - Table

Item #	Mandatory Proposal Requirements	Cross-Reference to Proposal (Indicate section and page # as appropriate)	Met/Not Met (Column for PSC use only)
MPR.1	<p>A completed and signed “Proposal to the Public Service Commission Bidder Information and Authorization” form as provided on Page 4 (page after Table of Contents) of this solicitation document MUST be included in the technical proposal portion of the proposal. The Bidder’s signature indicates acceptance of the terms and conditions set out herein.</p> <p>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.</p>		
MPR.2	<p>The Bidder MUST submit with its technical proposal, completed and signed copies of all certification clauses provided in PART 4 - CERTIFICATIONS.</p> <p>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.</p>		

<p>MPR.3</p>	<p>The Bidder MUST submit a completed Appendix “P” – Resource Information Sheet for <u>each proposed resource</u>.</p> <p>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.</p>		
<p>MPR.4</p>	<p>The Bidder MUST have for each proposed resource a completed and signed copy of Appendix “J” – Confidentiality Agreement.</p> <p>Bidders who do not submit duly completed and signed copy for each proposed resource 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.</p>		
<p>MPR.5</p>	<p>A curriculum vitae (CV) or résumé of the proposed resource(s) MUST be included in the proposal. The CV should be detailed and chronological (ex.: June 2014 to September 2018).</p>		

3.5 Mandatory Technical Criteria

For a proposal to be considered, the following mandatory technical requirements **MUST** be met. If the Bidder proposes more than one resource, each proposed resource **MUST** meet all mandatory technical requirements. The bidder should include the details in the following table:

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 resource 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.

Career summary:

- a) Individual’s detailed employment history;
- b) Past experience relevant to the evaluation criteria.

Organization(s) where the individual was employed, including:

- a) Organization name and total workforce (permanent full-time or part-time);
- b) Positions occupied, including start and end dates (mm-yy);
- c) Individual’s hierarchical level in the organization;
- d) Reporting structure both below and above the individual’s position.

Bidders should include an organizational chart to demonstrate or support the information provided.

3.5.1 – Mandatory Technical Requirements - Table

#	Mandatory Technical Requirements	Cross-Reference to Proposal (Indicate section and page # as appropriate)	Met/Not Met (Column for PSC use only)
MANAGEMENT EXPERIENCE			
MT.1	<p>The proposed resource MUST have a minimum of (3) consecutive years of experience as a Senior Executive.</p> <p>If the proposed resource's most recent employment as a Senior Executive has concluded within a period that is equal to or less than five (5) years from the date of bid closing (OR, if the proposed resource is still employed as a Senior Executive), then the proposed resource MUST have a minimum of two (2) consecutive years of experience as a Senior Executive.</p>		
EXPERIENCE GAINED IN COACHING, ON COMPETENCIES, MANAGEMENT & LEADERSHIP, ON EMPLOYMENT EQUITY ISSUES OR ON THE PUBLIC SERVICE			
MT.2	<p>The proposed resource MUST have acquired, as a minimum, a combination of the following experience that is equal to at least 150 points.</p> <p>If a proposed resource does not demonstrate a combination of experience equal to at least 150 points, this mandatory requirement will be evaluated as <u>NOT MET</u>.</p> <p>1) Formal Coaching - (75 points per cumulative year of involvement)</p> <p>Mentoring or providing career advice to clients, including aspiring executives and current executives on career or work related issues, through a systematic or formal process or structure (e.g., career development programs or services).</p> <p>2) Experience with Federal Public Service matters - (50 points per cumulative year of involvement)</p> <p>Public Service related matters, studies or consultation for the federal Public Service, contributing to the Public Service through either or a combination of the criteria below.</p> <p>a. Having completed a university degree, course, diploma, certificate, etc. involving an in-depth study of the federal public service, issues related to diversity and inclusion, management or leadership. To count as one year, the course undertaken must be of a duration of at least one year OR a combination of relevant courses completed over a period of at least one year;</p> <p>AND/OR</p> <p>b. Having worked closely with the federal public service during an assignment such as with a Member of Parliament (MP) or a Minister, having been a member of a central or a cross organizational consultative committee at the highest management levels.</p> <p>AND/OR</p> <p>c. Having done contract work related to the resource's professional/leadership/management credentials, for a significant federal public sector initiative or project (e.g. nationwide enquiry while employed in the private sector).</p>		
TECHNICAL SCORE (Minimum of 150 Points Required)			

#	Mandatory Technical Requirements	Cross-Reference to Proposal (Indicate section and page # as appropriate)	Met/Not Met (Column for PSC use only)
EDUCATION			
MT.3	<p>The proposed resource MUST possess as a minimum, a post-secondary diploma from a recognized Canadian university or college or a post-secondary diploma recognized by a Canadian credentials assessment service or Canadian legally mandated professional regulatory body if obtained outside Canada.</p> <p>The proposed resource MUST provide documentation (such as a copy of diploma) to confirm education.</p> <p>Bidders who do not submit the requested documentation with their proposal will have 72 hours (three business days) to provide them. If the documents are not provided within the 72 hours, the resource will be deemed non-compliant.</p>		

3.6 Financial Evaluation

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

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

A Bid Evaluation Value (BEV), will be used for evaluation purposes only, as defined below, and will be calculated as follows (using the Bidder’s offered hourly rate(s) in Appendix “G” – Basis of Payment):

Bid Evaluation Value (BEV) = Bidder’s proposed Firm All-inclusive Hourly Rate for Executive Counselling Services will be calculated using the Bidder’s proposed firm all-inclusive hourly rate in Appendix “G” – Basis of Payment, OR if the Bidder submit different firm all-inclusive hourly rates for each of its compliant proposed resources, the average of the Bidder’s proposed all-inclusive hourly rates will be used.

3.7 Basis of Selection

To be declared responsive, a bid **MUST**:

- a) comply with all the requirements of the RFSO;
- b) meet all mandatory technical evaluation requirements.

Bids not meeting (a) or (b) will be declared non-responsive. All responsive bids will be recommended for issuance of Standing Offers, in accordance with the requirements below:

The PSC will award up to sixty (60) Standing Offers, with a maximum of up to five (5) Standing Offers per region, other than the NCR.

Formula:
$$\frac{\text{Total Bid Evaluation Value (BEV)}}{\text{Technical Score for the Bidder's compliant proposed resource or average of the technical scores if the bidder has proposed multiple compliant resources}} = \text{Cost per point}$$

Fully responsive bidders with lower costs-per-point will be higher on the Standing Offer rotation list. See the example that follows.

Example:

Both Bidder A and Bidder B meet conditions (a) and (b) above and their bid has been declared responsive.

If Bidder A has a Bid Evaluation Value (BEV) of \$320.00 and 300 technical points, Bidder A's cost per point will be $\$320.00 / 300 = 1.07$.

If Bidder B has a Bid Evaluation Value (BEV) of \$320.00 and 150 technical points, Bidder B's cost per point Bidder B will be $\$320.00 / 150 = 2.14$.

In this example, Bidder A will be recommended for the award of a Standing Offer before Bidder B.

Should the quantity of responsive bids exceed sixty (60) Standing Offers, the following criteria will be applied to select and to award the Standing Offers. These criteria will be used only to identify responsive bids that will be awarded a Standing Offer. Following the issuance of the Standing Offers, these criteria will not be applicable for call-ups issuance. All call-ups will be awarded in accordance with the Call-up Procedures. The information included in the Resource Information Sheet (Appendix "I") will be used for this purpose.

The following criteria will be used to assess any additional bids (in this order):

- 1) Senior Executives (as described on page 10)
- 2) Bilingual in French and English
- 3) Experience in the area of Diversity and Inclusion

Should there be multiple compliant bids with the same cost per point, the responsive bid received and stamped first, by the date and time, will be recommended for award of a Standing Offer.

See PART 5 - STANDING OFFER AND RESULTING CONTRACT CLAUSES for information on how the work will be allocated.

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.

4.1 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.

4.2 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) 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

4.3 Former Public Servant Certification

Contracts with former public servants (FPS) in receipt of a pension or of a lump sum payment **MUST** bear the closest public scrutiny and reflect fairness in 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

4.4 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

4.5 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 *Policy on Conflict of Interest and Post-Employment* (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 *Policy on Conflict of Interest and Post-Employment* 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

4.6 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;
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)

4.7 Language Proficiency

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

4.8 Main Region(s) of Work

The Bidder certifies that he or she is in a position to deliver services in person, face-to-face to clients within the selected “Main Region(s) of Work”, 90% of the time.

Signature of authorized representative

Date

4.9 Resource Information Sheet

The Bidder certifies that all the information provided in Appendix “I” – Resource Information Sheet, including the details specified in sections 4.7 and 4.8 above are true and accurate for each proposed resource.

Signature of authorized representative

Date

4.10 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.

Signature of authorized representative

Date

PART 5 - STANDING OFFER AND RESULTING CONTRACT CLAUSES

A. STANDING OFFER

1. Bid

The Bidder offers to perform the Work in accordance with the Statement of Work at Appendix “D”.

2. Standard Clauses and Conditions

Appendixes “A”, “B”, “C”, “D”, “E”, “G”, “H”, “I” and “J” 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 award.

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

The Bidder 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 – Allocation of Work

Work will be allocated based on both the volume and particular nature of the demand received by the Project Authority. As neither the volume nor nature of the demand is controlled by the Project Authority, there can be no minimum guarantee of work and the Project Authority cannot guarantee equal allocation of work across successful resources. For each work request, the Project Authority will, with the client’s input, define specific service requirements. Work will be assigned based on specific criteria to the resources whose profile best responds to these requirements. The assessment of requirements and corresponding criteria will be made using the “Resource Information Sheet” (APPENDIX “I” of the present document). In no particular order, the criteria that will be used are the following:

- a) Region
- b) Language Proficiency
- c) Specialization

- d) Diversity and Sensitivity
- e) Availability
- f) Sectors of Knowledge and Experience

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

Region: The Project Authority may select the Standing Offer holder according to the location of service delivery be giving priority to on-site/face-to-face service. A given Client may require that the services be provided in 1-the NCR, 2-British Columbia and Yukon; 3-Southern Ontario; 6-Quebec and 7-Atlantic. Priority of work allocation will not necessarily be given to resources in the client's region and remote service (teleconferencing, webex, videoconferencing, phone) may be delivered, with the pre-authorization of the Project Authority and in agreement with the client.

Language Proficiency: A coaching request may be provided in the official language of the Client's choosing (French or English).

Specialization: A given Client or coaching request may require that the services be provided by an Executive Consultant who possesses experience at a given level of Executive leadership or type of organization or in a given range of organizations; or in certain functions or roles (e.g. policy development, operations, work with political level); or expertise in a specific domain (e.g. financial management, human resources management, management of scientific or professional groups); or has demonstrated competence and ability in a particular area of coaching or counselling (e.g. selection methodology, strategic career planning, job search strategy, leadership management), or possesses a coaching certification or courses towards a coaching certification, or a combination of some of the above.

Diversity and Sensitivity: A given Client or coaching request may require that the Executive Consultant be able to address specific employment equity issues or be a member of these groups (women, Aboriginals, persons with a disability, visible minority). The responsible professional may also judge that a certain coaching style or cognitive style would be most effective given Client characteristics (highly structured, less structured, formal or informal, concrete or abstract).

Availability: A given Client or coaching request may require service during a specific period of time, or within a short time frame, during which the Executive Consultant's availability may influence work allocation.

Sectors of Knowledge and Experience: A given Client may request a coach with particular knowledge of a certain assessment strategy, up to date with current government trends and tendencies.

Security Clearance: A given project may require that the Executive Consultant hve an enhanced security level such as Secret Level.

Subject to the above criteria, the PSC will make a best effort to evenly allocate Call-ups among the Standing Offer holders. Availability and other factors may limit the PSC's ability to allocate Call-ups evenly.

6. Call-up Instrument / Work Authorization

The Project Authority will authorize work by phone or by email amongst Standing Offer Holders, based on the Call-up procedures listed above. Once the work has been carried out, the Standing Offer Holder will invoice the PSC for the services. A Call-up using form PWGSC-TPSGC 942, "Call-up against a Standing Offer", will be issued in accordance to the pre-authorized work and accepted invoice. The contractor will provide one (1) invoice per month for the work provided and completed during that same month.

At no time may the Standing Offer Holder perform work beyond the maximum authorized in writing by the Project Authority. The Standing Offer Holder will not be compensated for any work performed without prior authorization.

7. Limitation of Call-ups

Individual Call-ups against the Standing Offer **MUST NOT** exceed **\$25,000.00** (Taxes included).

7.1 Needs Exceeding the Allowable Limit of \$25,000 for Call-ups:

The Project Authority **MUST** submit proposals from the Bidder exceeding the \$25,000 limit to the Standing Offer Authorities. Individual Call-ups exceeding \$25,000 can only be authorized using a PWGSC-TPSGC 942 form, "Call-up Against a Standing Offer", signed by the Standing Offer Authority, awarded **BEFORE** the work is authorized.

8. Cancellation of 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 to the Bidder, at least twenty four (24) hours prior to the Work Requirement scheduled date and time. There shall be no charges to The Crown for such cancellation.

Should the Project Authority cancel a Work Authorization without a notice to the Bidder of at least twenty four (24) hours prior to the Work Requirement schedules date and time, the Bidder may be paid a Cancellation Fee. The applicable instances where a payment will be made to the Bidder and the associated cancellation fees are specified under Appendix "G" - Basis of Payment of this Standing Offer.

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 Appendix "E" – General Conditions – Standing Offers – Goods or Services;
- 9.7 Appendix "G" – Basis of Payment;
- 9.8 Appendix "I" – Resource Information Sheet;
- 9.9 Appendix "J" – Confidentiality Agreement; and
- 9.10 The Bidder's bid _____, "as clarified on _____" *or* "as amended on _____".

10. Status and Availability of Resources

If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder **MUST** advise the 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 Bidder 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 Bidder'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 Bidder for the period of closure.

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:

<https://www.canada.ca/en/public-service-commission/corporate/about-us/doing-business-public-service-commission/general-conditions-service-contract.html>

APPENDIX “D” - Statement of Work

National Executive Counselling Services for the Public Service Commission of Canada (PSC)

1.0 Objective

The Executive Counselling Services (ECS) group at the Personnel Psychology Centre (PPC) of the PSC provides competency assessment and related career guidance, counselling and coaching services to the EX and equivalent groups and to employees planning to reach the EX level, such as senior professionals and middle managers. These services are required at PSC locations across Canada, which includes the following regions: National Capital Region; British Columbia and Yukon Region; Southern Ontario Region; Québec Region; and the Atlantic Region. The Public Service Commission of Canada recognizes that the diversity of its employees' population contributes to its strength and integrity. It is committed to achieving employment equity and developing a highly capable workforce that is representative of Canadian Society. It therefore encourages women, Aboriginal persons, persons with disabilities, and members of visible minority groups to apply and declare themselves as part of one or more of the above mentioned Employment Equity Designated Groups.

The Public Service Commission of Canada provides executive counselling services in both official languages (English and French) to a highly capable and diverse executive cadre and professionals, approximately half of whom are women. Also, approximately one third of its clientele requires services in the French language.

In order to better counsel female clients on the challenges of being a female executive in the federal public service, the PSC aims at providing services by executive consultants who are women.

In order to better serve its clients who are French speaking, the PSC aims to have available executive consultants able to offer coaching and advisory services in the French language.

In order to better counsel clients who are Aboriginal, persons with disabilities or members of a Visible Minority, on the challenges of being an Aboriginal, a person with disabilities or a member of a Visible Minority and an executive in the federal public service, the Public Service Commission of Canada also aims at offering services by a diverse pool of executive consultant, including consultants who are Aboriginal, persons with a disability, or members of Visible Minorities.

2.0 Background

The ECS provides career assessment and counselling, and coaching services to members of the EX and equivalent groups, and to senior professionals and managers who may soon attain entry to the EX group.

3.0 The PSC-ECS Mandate and Approach

The PSC and specifically the ECS of the PPC assist Departments and Federal government organizations in offering counselling and coaching services to public servants with regards to their ability to perform at work. Furthermore, ECS offers leadership-focused services, such as leadership competencies assessment and development as well as support for leadership challenges and diversity and inclusion issues, aiming at preparing clients for leadership roles, career progression, assessment boards, etc.

4.0 Tasks/Scope

Work to be performed by the Executive Consultants, on an “as and when requested” basis, as authorized by the Project Authority, includes actual time spent performing any of the following:

Executive Counselling Services

- 4.1 Conducting confidential guidance, coaching and/or consulting sessions to help individual Clients who want to develop their management and leadership competencies, who are planning employment transition, or who are looking for support in handling a difficult situation. Executive counselling services include meeting Clients on an individual

basis in person or by telephone, teleconferencing, videoconferencing or webex, as agreed upon with the Project Authority;

- 4.2 Providing interview preparation services to designated Clients of ECS. Interview preparation services include meeting Clients on an individual basis in person or by telephone, teleconferencing, videoconferencing or webex (as agreed upon with the Project Authority and in agreement with clients), providing information related to selection methods and recommendations regarding approaches to preparation, discussing expectations commonly held by boards as well as expectations for performance at the target level, and providing opportunities for the individual to practice responding to typical interview questions and receive verbal feedback on their performance;
- 4.3 Writing and providing up-to-date and accurate consultation notes for each Client meeting, and submitting these in the intended file to the responsible ECS representative immediately after the services have been provided; For any remote work, pre-authorized by the Project Authority and in agreement with clients, providing the ECS representative with appropriate financial and professional content in a format and process approved by the Project Authority;
- 4.4 Preparing, at times, in consultation with the ECS board preparation facilitator, or the psychologist, interview questions for use during simulations, based on the documentation provided by the Client or by the psychologist, as required to assist the client;
- 4.5 Participating in simulated board interviews, working collaboratively with the board preparation facilitator or the Client's ECS psychologist and with other Executive Consultant(s). The board preparation facilitator, the ECS coordination team, or someone in their name should be notified that a mock board is taking place and determine its composition in collaboration with the Executive Consultant.
- 4.6 Delivering workshops designed by ECS and using material supplied by ECS to groups of participants, in team with an ECS psychologist;
- 4.7 When relevant, participating in client progress reviews with the board preparation facilitator or the identified supervising ECS psychologist for a duration of up to one half hour for approximately every ten hours of work assigned; Providing clarifications or explanations about the work performed or the notes written;
- 4.6 Developing and (or) upgrading services provided by the ECS such as:
 - 4.8.1 Drafting and (or) reviewing documents,
 - 4.8.2 Tailoring workshop materials,
 - 4.8.3 Providing strategic consulting services,
 - 4.8.4 Participating in a working group, and
 - 4.8.5 Helping to promote services through external contacts.
- 4.9 Participating in special assessments, coaching and other related projects which could involve the provision of services to groups, consulting on development of in house tools, research on best practices with regards to diversity and inclusion, staffing as requested by the Project Authority; and
- 4.10 Participating in mandatory training or meetings, as requested by the Project Authority.

5.0 Constraints

Before a first call-up is placed, Executive Consultants must attend an "Orientation Session for Executive Consultants". The orientation will consist of an overview of the services required by ECS, the roles of the psychologists, and the expectations associated with the Executive Consultant's role. The duration of the session will vary depending on whether or not the consultant is new or has previously worked with ECS. **Attendance at all or any "Orientation Sessions" shall be at the contractor's sole expense and at no cost to The Crown.**

The consultant's work will be monitored through feedback completed by ECS psychologists, ECS assigned professionals, as well as clients. On an as needed basis, the ECS manager or Project Authority will meet with Executive Consultants in order to follow-up on the feedback received.

During the Standing Offer period, the Project Authority will conduct, on an ongoing basis, quality assurance verification to monitor the work performed by each Executive Consultant. The frequency of the monitoring will occur when deemed

necessary by the Project Authority and may or may not be announced in advance. **Attendance at a “Quality Assurance Review and Feedback Session” shall be at the contractor’s sole expense and at no cost to The Crown.**

In order for future work to be called-up, an Executive Consultant **MUST** satisfactorily meet the applicable Quality Assurance criteria each time work is monitored. These applicable Quality Assurance criteria will be discussed with the successful contractors at the orientation session.

6.0 Deliverables:

Executive Consultants **MUST** prepare and deliver to the ECS psychologist or facilitator, consultation notes in a format approved by the Project Authority and to be agreed with the psychologist or facilitator for each client meeting, immediately after the meeting. When requested, Executive Consultants shall also deliver to ECS, any other notes, plans or other work products prepared in the performance of the services described in Section 4.0 – Tasks / Scope.

7.0 Work Location & Travel:

7.1 Work Location:

- Executive Counselling Services shall be provided on PSC premises, unless otherwise specified or approved by the Project Authority and in agreement with the client. In the NCR, the Public Service Commission will provide office space, facilities and equipment on an “as required basis” to perform the in-person services. The executive consultant shall be provided office space equipped with furniture and equipment. Assistance shall be provided for some administrative tasks; as approved by the Project Authority. Services could also be provided at the client’s work location, given the Project Authority’s approval and with the client’s agreement. Services provided in any other location will require a request made to the Project Authority.
- For services provided in the other PSC Regions, Executive Counselling Services provided in person shall normally take place on government premises provided by the client, unless otherwise agreed upon with the client and approved by the Project Authority.
- The executive consultant may be responsible for providing office space equipped with such furniture and equipment, together with such staff and other services as it may be necessary for carrying out the services required.

Note: The PSC will not pay for travel and living expenses for services provided, unless if pre-authorized by the Project Authority.

7.2 Availability:

Executive Consultants **MUST** be available to provide services in person, by teleconferencing, videoconferencing, phone or webex, as approved by the Project Authority to a particular client within 48 hours of receiving a service request, unless otherwise approved by the Project Authority. If a Consultant is not available within 48 hours, the Project Authority will proceed with another qualified Standing Offer holder.

7.3 Travel:

- 7.3.1 The PSC will not pay for travel within the National Capital Region.
- 7.3.2 The PSC will not pay for travel and living expenses for services within 100 KM of the proposed resource’s place of business (as identified in Appendix “I” – Resource Information Sheet) specified in the Standing Offer, as it is anticipated that the contractor will be assigned on-site work only within their respective regions. Any work allocated in excess of this 100 KM, or in any another region than the resource’s identified region(s) of work will be delivered remotely (teleconferencing, webex, phone, videoconferencing), unless travel has been pre-authorized by the project-Authority.

- 7.3.3 Should specific circumstances dictate that travel to a location outside of the regions specified in the Standing Offer be necessary, the Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the National Joint Council Travel Directive, and with the other provisions of the directive referring to "travellers", rather than those referring to "employees".
- 7.3.4 All travel **MUST** be authorized and pre-approved by the Project Authority.

8.0 Security Requirements:

The Contractor's personnel requiring access to PROTECTED information, assets or sensitive work site(s) must EACH hold a valid RELIABILITY STATUS, approved by the CISD/PWGSC.

The Contractor **MUST NOT** remove any PROTECTED information or assets from the identified work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restriction.

Confidentiality and Material:

- 8.1 The Contractor shall keep confidential all information provided to the Contractor by or on behalf of The Crown 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 sub-contractor authorized by the PSC, information necessary for the performance of the Subcontract, on the condition that the sub-contractor agrees that it will be used solely for the purposes of such Subcontract. Information provided to the Contractor by or on behalf of The Crown shall be used solely for the purpose of the Standing Offer and shall remain the property of The Crown or the third party, as the case may be. Unless the Standing Offer otherwise expressly provides, the Contractor shall deliver to The Crown all such information, together with every copy, draft, working paper and note thereof that contains such information, upon completion or termination of the Standing Offer or at such earlier time .
- 8.2 When the Standing Offer, the Work, or any information referred to in subsection 8.1 is identified as PROTECTED by The Crown, 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.
- 8.3 Without limiting the generality of subsections 8.1 and 8.2, when the Standing Offer, the Work, or any information referred to in subsection 8.1 is identified as PROTECTED by The Crown, the PSC shall be entitled to inspect the Contractor's premises and the premises of a sub-contractor for security purposes at any time during the term of the Standing Offer, and the Contractor shall comply with, and ensure that any such sub-contractor 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 sub-contractor execute and deliver declarations relating to reliability screenings, security clearances and other procedures.

9.0 Restrictions on the use of materials provided by the Crown

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).

These materials and information include but are not limited to Client files, 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.

10.0 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.

11.0 Confidentiality Agreements:

Confidentiality is a cornerstone of the commitment that the Executive Counselling Services group makes to its client. The Confidentiality at the Executive Counselling Services agreement (Appendix “J”), **MUST** be sign by each proposed resource(s).

12.0 Official Languages:

The services specified in Section 4.0 - Tasks / Scope are required in either the English or French language, or both, as individual client requirements warrant. Language proficiency will be a consideration in the allocation of call-ups. See PART 5 – Standing Offer and Resulting Contract Clauses, Section 5 – Call-up procedures/Allocation of Work.

13.0 Green Procurement and Services:

The Contractor should 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 to the full extent to which it is procurable.

APPENDIX “E” - 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

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 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 subsection 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 Project Authority will authorize work by phone or by email amongst Standing Offer Holders, based on the Call-up procedures listed above. Once the work has been carried out, the Standing Offer Holder will invoice the PSC for the services. A Call-up using form PWGSC-TPSGC 942, "Call-up against a Standing Offer", will be issued in accordance to the pre-authorized work and accepted invoice. The contractor will provide one (1) invoice per month for the work provided and completed during that same month.

At no time may the Standing Offer Holder perform work beyond the maximum authorized in writing by the Project Authority. The Standing Offer Holder will not be compensated for any work performed without prior authorization.

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 “F” - 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 11.
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 **120 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 labour, 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 “G” - Basis of Payment
Executive Counselling Services**

FOR EASE OF SUBMISSION, THE BIDDER IS INVITED TO COMPLETE AND SUBMIT THIS APPENDIX AS PART OF ITS FINANCIAL PROPOSAL.

A separate Appendix “G” “Basis of Payment” is required for each proposed resource.

<p>Name of the proposed resource:</p> <hr/> <p>Main Regions and/or Provinces of work:</p> <hr/>	<p align="center">MAXIMUM</p> <p align="center">All-inclusive Hourly Rate <i>(Exclusive of the Taxes)</i></p>	<p align="center">BIDDER’S PROPOSED Firm All-inclusive Hourly Rate <i>(Exclusive of the Taxes)</i></p> <p align="center">MUST NOT EXCEED MAXIMUM</p> <p align="center"><small>(Applicable to the initial period, to the first, second and third option periods)</small></p>
<p>Executive Counselling Services</p> <p>Includes (as requested and authorized by the Project Authority):</p> <ul style="list-style-type: none"> ▪ Conducting confidential services to individual ECS Clients (including preparation time and consultation notes for sessions) ▪ Simulated mocks for EX assessment processes (Could include: preparing interview questions) ▪ Preparing and facilitating workshops ▪ Special projects (could include: consulting on development of in house tools, research on best practices with regards to diversity and inclusion, staffing) 	<p align="center">Maximum \$110.00</p>	<p align="center">\$ _____</p>

The Bidder should indicate which tax rate it will be charging the PSC:

Tax: _____ (%)

Where not otherwise specified, maximum acceptable times for each billable activity are subject to prior approval by ECS management. What constitutes appropriate maximum acceptable times for each billable activity will be further discussed at the mandatory Orientation Session.

For a Proposal to be financially responsive, a Bidder MUST propose Firm All-inclusive Hourly Rates for Executive Counselling Services that does not exceed the Maximum Rate shown above.
Attendance at the Orientation Session specified in Appendix “D” – Statement of Work of the RFSO, MUST be at the Bidder’s sole expense and at no cost to The Crown.
Attendance at the “Quality Assurance Review and Feedback Sessions” specified in Appendix “D” – Statement of Work of the RFSO, MUST be at the Bidder’s sole expense and at no cost to The Crown.
Attendance at meetings set by the Project Authority on any new procedures or information deemed important for the Bidder, MUST be at the Bidder’s sole expense and at no cost to The Crown

CANCELLATION FEES

Work Authorizations	Cancellation Fee
Any Work Authorization cancelled by the the Project Authority twenty four (24) hours or MORE prior to the Work Requirement scheduled date and time.	No cancellation fee
Any Work Authorization cancelled by the the Project Authority LESS than twenty four (24) hours prior to the Work Requirement scheduled date and time.	One hour of Executive Counselling Services
Executive counselling appointments AND Simulated mocks interviews	Cancellation Fee
For executive counselling appointments and simulated mocks interviews cancelled by the client* 48 hours or MORE prior to the identified date and time.	No cancellation fee
For executive counselling appointments and simulated mocks interviews cancelled by the client* LESS than 48 hours prior to the identified date and time.	One hour of Executive Counselling Services

**Clients are designated by the Executive Counselling Services (ECS) group*

The rates stated within this RFSO are subject to increase at anytime 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 and the rates proposed by the Bidder will be prorated accordingly.

Reimbursable Cost

When required, premises suitable for counselling may need to be rented by the Consultant. The Project Authority shall approve in writing, the location and costs prior to their use.

The Contractor will be reimbursed at cost, with no allowance for profit, should specific circumstances dictate that the rental of a location is required for counselling. The contractor **MUST** submit a proof of payment for the rental of the location with their service invoice.

APPENDIX "H" - Security Requirements Check List (SRCL)



Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat D1120-18-2002
Security Classification / Classification de sécurité UNCLASSIFIED

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 / Commission de la fonction publique / Ministère ou organisme gouvernemental d'origine Public Services Commission	2. Branch or Directorate / Direction générale ou Direction SASB			
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 Provide coaching to executives and aspiring executives who are employed by the federal public service				
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 checked="" type="checkbox"/>	No / Non	<input 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 checked="" type="checkbox"/>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>		
Not releasable / À ne pas diffuser <input 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:	Specify country(ies): / Préciser le(s) pays:		
7. c) Level of information / Niveau d'information				
PROTECTED A / PROTÉGÉ A <input 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 <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	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"/>		



Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat D1120-18-2002
Security Classification / Classification de sécurité UNCLASSIFIED

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 Yes
Non 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 Yes
Non 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 EMBLEMES | | | |

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 Yes
Non Oui
If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté? No Yes
Non 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 Yes
Non 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 Yes
Non 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 Yes
Non 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 Yes
Non 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 Yes
Non Oui

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité
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Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat D1120-18-2002
Security Classification / Classification de sécurité UNCLASSIFIED

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 SECRET	COSMIC TOP SECRET / COSMIC TRÈS SECRET	PROTECTED / PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET / TRÈS SECRET
											A	B	C			
Information / Assets / Renseignements / Biens / Production		X														
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 “I” - Resource Information Sheet

FOR CALL-UP / WORK ALLOCATION PURPOSES

Bidders MUST fill this appendix as this information will be used to allocate work to successful bidders

Sections with asterisks (*) are mandatory**

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

This information will be used for work allocation, (refer to PART 5 on Work Allocation). In certain instances, missing or un-filled information on a resource might prevent the Project Authority or an ECS representative to allocate work to this resource.

*****1 - Name of proposed resource**

Name (capital letters): _____

*****2 - Main Region(s) of Work**

To be able to identify a region and/or province as a “Main Region and/or Province of Work”, the bidder’s proposed resource **MUST** be in a position to deliver services within that region and/or province, in person (face-to-face with clients), 90% of the time, and comply to availability requirements as well. Work could be allocated in other regions or provinces, in which case services could be delivered remotely (e.g., telephone, teleconferencing, webex, videoconferencing); with the authorization of the Project Authority. Any travel **MUST** be pre-approved by the Project Authority.

Resources may be proposed in more than one region and/or province of work.

For regions or provinces other than NCR, bidders are to specify the location of the proposed resource’s business address. Travel will not be paid for travel within 100KM of this address.

IDENTIFY YOUR MAIN REGION(S) OF WORK
<input type="checkbox"/> 1. NCR – National Capital Region
<input type="checkbox"/> 2. British Columbia and Yukon Region Specify the location (address) of the resource’s place of business: _____
<input type="checkbox"/> 3. Southern Ontario Region (excluding NCR) Specify the location (address) of the resource’s place of business: _____
<input type="checkbox"/> 4. Quebec Region (excluding NCR) Specify the location (address) of the resource’s place of business: _____
<input type="checkbox"/> 5. Atlantic Region Specify the location (address) of the resource’s place of business: _____

*****3 – Language Proficiency**

For each proposed resource, the Bidder **MUST** identify **ONE** first official language, and its capability to offer services in the second official language, English or French.

OFFICIAL LANGUAGES	
<p>English/Anglais</p> <p><input type="checkbox"/> English is my First Official Language</p> <p><input type="checkbox"/> I have advanced proficiency to offer services in English, as my second Official Language, as defined in PART 4 – Certification, section 4.7 – Language Proficiency</p>	<p>French/Français</p> <p><input type="checkbox"/> French is my First Official Language</p> <p><input type="checkbox"/> I have advanced proficiency to offer services in French, as my second Official Language, as defined in PART 4 – Certification, section 4.7 – Language Proficiency</p>

*****4 – Highest Level Attained**

HIGHEST LEVEL ATTAINED
<p>Highest executive level attained (please provide title and level, and reporting structure when relevant)</p> <p>_____</p> <p>_____</p> <p>_____</p>

*****5 – Specialization**

Identify in which of the following Area(s) of Specializations the proposed resource has at least one (1) year of experience as an executive.

SPECIALIZATION
<p>A – Organizations</p>
<p>Specific organization(s) (provide the name of each organization and a brief description):</p> <p>_____</p>

B – Sectors	
	Describe your experience
Finance / Accounting / Economics / Commerce	
Policy development /Central Agency	
Human Resources / Training / Work Relations	
Information Technology / Computers or programming	
Political / Parliamentary or Communications	
Line Environment / Operational Setting / Service Delivery	
Scientific/Professional (e.g. related to managing registered professionals, managing research)	
Legal (within a legal institution, dealing with the court or litigation)	
Contracting/Purchasing	
International	
Defence / Security	
C – Specific Experience / Approach	
	Specify/Describe your experience
Expertise in a specific management context, challenge, or assignments (e.g. start ups, change management, negotiations with Unions)	
Specific approach, style, competencies and/or strengths (e.g. partnering, mediation, creativity).	
Experience working with clients using a particular assessment strategy, experience with providing advice to clients on current government trend)	
Coaching certification or courses taken towards a coaching certification	
Other relevant information	

6 - Diversity & Sensitivity

DIVERSITY & SENSITIVITY		
Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Other		<input type="checkbox"/> Person with Disability
<input type="checkbox"/> Visible Minority	<input type="checkbox"/> Indigenous	<input type="checkbox"/> Other:
Coaching approach, style (describe) :		
Employment Equity/diversity experience (describe):		
Relevant personal experiences (eg. cancer survivor, immigrant, mental health in the family, etc.) (describe any life or personal experiences or challenges that have enriched your coaching approach from a diversity perspective):		

7 - Current and Valid Security Level

<p>Please indicate:</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
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APPENDIX “J” - Confidentiality 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.

THE UNDERSIGNED

Signature

Name (print)

Date