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PART 1 - GENERAL INFORMATION

1.1 Introduction

The Request for Supply Arrangements (RFSA) is divided into six parts plus attachments and annexes, as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Supplier Instructions: provides the instructions applicable to the clauses and conditions of the RFSA;
- Part 3 Arrangement Preparation Instructions: provides Suppliers with instructions on how to prepare the arrangement to address the evaluation criteria specified;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria which must be addressed in the arrangement and the basis of selection;
- Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided; and
- Part 6 6A, Supply Arrangement, 6B, Bid Solicitation, and 6C, Resulting Contract Clauses:
 - 6A, includes the Supply Arrangement (SA) with the applicable clauses and conditions;
 - 6B, includes the instructions for the bid solicitation process within the scope of the SA;
 - 6C, includes general information for the conditions which will apply to any contract entered into pursuant to the SA.

The Annexes include the Statement of Work, the Security Requirement check List and the Supply Arrangement Reporting.

1.2 Summary

To provide executive search services, including executive search for senior leadership and critical positions (regional, national or international in scope), to support the Government in its identification, recruitment and assessment of high potential and diverse candidates to fill senior leadership positions in the Canadian public sector including GiC appointees.

Senior leadership positions in a public sector organization include:

- a) Heads or chief executive officers of Crown Corporations (GiCs);
- b) Agents and Officers of Parliament (GiCs);
- c) Heads and Chairs of government organizations, boards, tribunals or commissions (GiCs)
- d) Senior leadership positions in the core public service (GiCs & EX), and their equivalents across all orders of government

Each responsive bid will result in a Supply Arrangement (SA).

The SA has no defined end-date and will remain valid until such time as Canada no longer considers it to be advantageous to use it.

The requirement is subject to the provisions of the Canadian Free Trade Agreement (CFTA).

1.2.1 Security

There are security requirements associated with this requirement. For additional information, consult Part 1 - General Information, and Part 6A - Supply Arrangement. For more information on personnel and organization security screening or security clauses, Suppliers should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

1.2.2 Canadian Content Policy

The requirement is limited to Canadian services.

1.2.3 Comprehensive Land Claims Agreements (CLCAs)

The Request for Supply Arrangements (RFSA) is to establish supply arrangements for the delivery of the requirement detailed in the RFSA to the Identified Users across Canada, excluding locations within Yukon, Northwest Territories, Nunavut, Quebec, and Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirement for deliveries to locations within CLCAs areas within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador will have to be treated as a separate procurement, outside of the resulting supply arrangements.

1.2.4 Epost Connect service

This RFSA allows suppliers to use the epost Connect service provided by Canada Post Corporation to transmit their arrangement electronically. Suppliers must refer to Part 2 of the RFSA entitled Supplier Instructions and Part 3 of the RFSA entitled Arrangement Preparation Instructions for further information on using this method.

1.3 Security Requirements

1.3.1 Before issuance of a supply arrangement, the following conditions must be met:

- a) the Supplier must hold a valid organization security clearance as indicated in Part 6A - Supply Arrangement;
- b) the Supplier's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 6A - Supply Arrangement;
- c) the Supplier must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
- d) the Supplier's proposed location of work performance and document safeguarding must meet the security requirements as indicated in Part 6A - Supply Arrangement;
- e) the Supplier must provide the addresses of proposed sites or premises of work performance and document safeguarding as indicated in Part 3 - Section IV Additional Information.

1.3.2 Suppliers are reminded to obtain the required security clearance promptly. Any delay in the issuance of a supply arrangement to allow the successful Supplier to obtain the required clearance will be at the entire discretion of the Supply Arrangement Authority.

1.3.3 For additional information on security requirements, Suppliers should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

1.4 Canadian Content

The services covered by the Supply Arrangement may be limited to Canadian services (as defined in clause [A3050T](#)).

SACC *Manual* clause [A3050T](#) (2020-07-01) Canadian Content Definition

1.5 Debriefings

Suppliers may request a debriefing on the results of the request for supply arrangements process. Suppliers should make the request to the Supply Arrangement Authority within 15 working days of receipt of the results of the request for supply arrangements process. The debriefing may be in writing, by telephone or in person.

1.6 Use of an e-Procurement Solution (EPS)

Canada is currently developing an online EPS for faster and more convenient ordering of goods and services. In support of the anticipated transition to this system and how it may impact any resulting Supply Arrangement that is issued under this solicitation, refer to 6.12 Transition to an e-Procurement Solution (EPS).

The Government of Canada's [press release](#) provides additional information.

PART 2 - SUPPLIER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

Suppliers who submit an arrangement agree to be bound by the instructions, clauses and conditions of the RFSA and accept the clauses and conditions of the Supply Arrangement and resulting contract(s).

The [2008](#) (2020-05-28) Standard Instructions - Request for Supply Arrangements - Goods or Services, are incorporated by reference into and form part of the RFSA.

Subsection 5.4 of [2008](#), Standard Instructions - Request for Supply Arrangements - Goods or Services, is amended as follows:

Delete: 60 days
Insert: 90 days

2.2 Submission of Arrangements

Arrangements must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated in the RFSA.

Note: For suppliers choosing to submit using epost Connect for arrangements closing at the Bid Receiving Unit in the National Capital Region (NCR) the email address is:

tpsgc.dgareceptiondessaoumissions-abbidreceiving.pwgsc@tpsgc-pwgsc.gc.ca

Note: Arrangements will not be accepted if emailed directly to this email address. This email address is to be used to open an epost Connect conversation, as detailed in Standard Instructions [2008](#), or to send arrangements through an epost Connect message if the bidder is using its own licensing agreement for epost Connect.

Due to the nature of the Request for Supply Arrangements, transmission of arrangements by facsimile to PWGSC will not be accepted.

2.3 Former Public Servant - Notification

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

2.4 Federal Contractors Program for Employment Equity - Notification

The Federal Contractors Program (FCP) for employment equity requires that some contractors make a formal commitment to Employment and Social Development Canada (ESDC) - Labour to implement employment equity. In the event that this Supply Arrangement would lead to a contract subject to the

Federal Contractors Program (FCP) for employment equity, the bid solicitation and resulting contract templates would include such specific requirements. Further information on the Federal Contractors Program (FCP) for employment equity can be found on [Employment and Social Development Canada \(ESDC\) - Labour's](#) website.

2.5 Enquiries - Request for Supply Arrangements

All enquiries must be submitted in writing to the Supply Arrangement Authority no later than 7 calendar days before the Request for Supply Arrangements (RFSA) closing date. Enquiries received after that time may not be answered.

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

2.6 Applicable Laws

The Supply Arrangement (SA) and any contract awarded under the SA must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

Suppliers may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of the arrangement, 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 Suppliers.

2.7 Bid Challenge and Recourse Mechanisms

- a) Several mechanisms are available to potential suppliers to challenge aspects of the procurement process up to and including contract award.
- b) Canada encourages suppliers to first bring their concerns to the attention of the Contracting Authority. Canada's [Buy and Sell](#) website, under the heading "[Bid Challenge and Recourse Mechanisms](#)" contains information on potential complaint bodies such as:
 - i. Office of the Procurement Ombudsman (OPO)
 - ii. Canadian International Trade Tribunal (CITT)
- c) Suppliers should note that there are **strict deadlines** for filing complaints, and the time periods vary depending on the complaint body in question. Suppliers should therefore act quickly when they want to challenge any aspect of the procurement process.

PART 3 - ARRANGEMENT PREPARATION INSTRUCTIONS

3.1 Arrangement Preparation Instructions

If the Supplier chooses to submit its arrangement electronically, Canada requests that the Supplier submits its arrangement in accordance with section 08 of the 2008 standard instructions. The epost Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation. The arrangement must be gathered per section and separated as follows:

Section I: Technical Arrangement
Section II: Certifications
Section III: Additional Information

If the Supplier chooses to submit its arrangement in hard copies, Canada requests that the Supplier submits its arrangement in separately bound sections as follows:

Section I: Technical Arrangement (2 hard copies)
Section II: Certifications (1 hard copy)
Section III: Additional Information (1 hard copy)

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

If the Supplier is simultaneously providing copies of its arrangement using multiple acceptable delivery methods, and if there is a discrepancy between the wording of any of these copies and the electronic copy provided through epost Connect service, the wording of the electronic copy provided through epost Connect service will have priority over the wording of the other copies.

Due to the nature of the RFSA, arrangements transmitted by facsimile will not be accepted.

Canada requests that suppliers follow the format instructions described below in the preparation of hard copy of their arrangement:

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

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process [Policy on Green Procurement](https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573) (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573>). To assist Canada in reaching its objectives, suppliers should:

- 1) use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
- 2) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.

Section I: Technical Arrangement

In the technical arrangement, Suppliers should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

Section II: Certifications

Suppliers must submit the certifications and additional information required under Part 5.

Section III: Additional Information

3.1.1 Supplier's Proposed Sites or Premises Requiring Safeguarding Measures

- 3.1.1.1 As indicated in Part 1 under Security Requirements, the Supplier must provide the full addresses of the Supplier's and proposed individuals' sites or premises for which safeguarding measures are required for Work Performance:

Street Number / Street Name, Unit / Suite / Apartment Number
City, Province, Territory / State
Postal Code / Zip Code
Country

- 3.1.1.2 The Company Security Officer must ensure through the [Contract Security Program](#) that the Supplier and proposed individual(s) hold a valid security clearance at the required level, as indicated in Part 1, clause 1.3, Security Requirements.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- a) Arrangements will be assessed in accordance with the entire requirement of the Request for Supply Arrangements including the technical evaluation criteria.
- b) An evaluation team composed of representatives of Canada will evaluate the arrangements.

4.1.1 Technical Evaluation

4.1.1.1 Mandatory Technical Criteria

Please refer to Attachment 1 to Part 4

4.1.1.2 Point Rated Technical Criteria

Please refer to Attachment 1 to Part 4

4.2 Basis of Selection

4.2.1 To be declared responsive, an arrangement must:

- a) comply with all the requirements of the Request for Supply Arrangements;
- b) meet all mandatory technical evaluation criteria; and
- c) obtain the required minimum number of points specified in Attachment 1 to Part 4 for the point rated technical criteria.

4.2.2 Arrangements not meeting a), b) or c) above will be declared non-responsive.

Attachment 1 to Part 4

Technical Evaluation

1.0 Mandatory Technical Criteria

The arrangement must meet all mandatory technical criteria specified in the table below. The Suppliers must provide the necessary documentation to demonstrate compliance.

Any arrangement which fails to meet any of the mandatory technical criteria will be declared non-responsive. Each criterion should be addressed separately.

1.1 Definitions

1.1.1 Senior leadership positions in the Canadian private and non-profit sector include:

- a) Chairs of boards of directors; and
- b) Chief executive officers and vice presidents (including senior or executive vice presidents) of corporate and non-profit entities.

1.1.2 Senior leadership positions in a public sector organization include:

- a) Heads or chief executive officers of Crown Corporations (GiCs);
- b) Agents and Officers of Parliament (GiCs);
- c) Heads and Chairs of government organizations, boards, tribunals or commissions (GiCs)
- d) Senior leadership positions in the core public service (GiCs & EX), and their equivalents across all orders of government

1.1.3 Successfully completed:

A supplier conducted a comprehensive search and recruitment effort, demonstrating their level of effort, and resulting in an appointment. i.e., the proposed candidate was hired or appointed to the position and held the position for 1 year or more.

1.1.4 Definition of Employment Equity and Diversity:

Women, Indigenous peoples, persons with disabilities and members of visible minorities constitute Employment Equity (EE) groups, and diversity of representation ensures that EE and other minorities (LGTBQ2, and ethnic and cultural groups) are properly represented in positions of leadership, reflective of the Canadian population as a whole.

1.1.5 Expertise:

Scope of experience in terms of both the depth and breadth of executive searches performed across industry sectors (as defined by StatsCan NAICS <https://www.statcan.gc.ca/eng/concepts/industry>)

Number	Mandatory Technical Evaluation Criterion
MT1	<p>The Supplier must demonstrate that the proposed Account Manager has a minimum of 5 years of experience within the last 7 years preceding the bid solicitation closing date, in providing executive search services for senior leadership positions in Canadian private sector companies, public sector or not-for-profit organizations/academia (as per article 1.1.1 and article 1.1.2 above), and must also demonstrate that this experience includes diversity and employment equity recruitment, as per article 1.1.4 above.</p> <p>The account Manager must have a minimum of an undergraduate degree from a recognized Canadian university or a university recognized by Canada. If the university degree was obtained outside of Canada, it must be approved by a recognized Canadian academic credentials assessment service, which can be identified on the website of the Canadian Information Centre for International Credentials (https://www.cicic.ca/927/identify_the_organization_responsible_for_recognition.canada).</p> <p>The supplier must provide the curriculum vitae (CV) for the proposed Account Manager and should include copies of relevant degrees.</p> <p>The Supplier must submit details of 5 successfully completed searches, for which the proposed Account Manager coordinated the services.</p> <p>The Supplier must, as a minimum, provide the following information for each successfully completed searches:</p> <ul style="list-style-type: none">a) the name of the proposed Account Manager;b) the search period, including start and end dates;c) the name and address of the client company or organization, indicating whether the client is in the private sector or the public sector;d) the title, role and responsibilities of the position; ande) the services provided by the Supplier, emphasizing the outreach and recruitment activity undertaken to attract EE and other minority candidates. <p>The Supplier should also provide:</p> <ul style="list-style-type: none">f) The reference contact name, e-mail address and telephone number of the client, for verification undertaken. <p><i>Demonstration of this experience is met through:</i></p> <ul style="list-style-type: none">a) two (2) out of the five (5) examples being wholly focused on recruitment of EE or diversity candidates (i.e. EE/diversity hire is the primary objective of the client), <p>OR,</p> <ul style="list-style-type: none">all five (5) examples include an EE or diversity emphasis that is demonstrable through listing of outreach activities designed to increase the representation of EE and diversity amongst the high potential candidates.

MT2	<p>The Supplier must demonstrate it has successfully completed, executive searches for senior leadership positions with a focus on recruitment to increase diversity and employment equity representation, within the last 5 years preceding the RFSA's closing date.</p> <p>The Supplier must, as a minimum, provide the following information for five (5) successfully completed searches:</p> <ul style="list-style-type: none">a) the name of the proposed Account Manager;b) the search period, including start and end dates;c) the name and address of the client company or organization, indicating whether the client is in the private sector or the public sector;d) the title, role and responsibilities of the position; ande) the services provided by the Supplier, emphasizing the outreach and recruitment activity undertaken to attract EE and other minority candidates. <p>The Supplier should also provide:</p> <ul style="list-style-type: none">f) The reference contact name, e-mail address and telephone number of the client, for verification undertaken. <p><i>The searches provided for MT2 must be different from the searches provided for MT3 and MT4.</i></p>
MT3	<p>The Supplier must demonstrate that it has successfully completed executive searches for senior leadership positions in a Canadian public sector organization, within the last 5 years preceding the RFSA's closing date.</p> <p>The Supplier must, as a minimum, provide the following information for five (5) successfully completed searches:</p> <ul style="list-style-type: none">a) the name of the proposed Account Manager;b) the search period, including start and end dates;c) the name and address of the client company or organization, indicating whether the client is in the private sector or the public sector;d) the title, role and responsibilities of the position; ande) the services provided by the Supplier, emphasizing the outreach and recruitment activity undertaken to attract EE and other minority candidates. <p>The Supplier should also provide:</p> <ul style="list-style-type: none">f) The reference contact name, e-mail address and telephone number of the client, for verification undertaken. <p><i>The searches provided for MT3 must be different from the searches provided for MT2 and MT4.</i></p>

MT4	<p>The Supplier must demonstrate that it has successfully completed executive searches for senior leadership positions in the private sector, within the last 5 years preceding the RFSA's closing date.</p> <p>The Supplier must, as a minimum, provide the following information for five (5) successfully completed searches:</p> <ul style="list-style-type: none"> a) the name of the proposed Account Manager; b) the search period, including start and end dates; c) the name and address of the client company or organization, indicating whether the client is in the private sector or the public sector; d) the title, role and responsibilities of the position; and e) the services provided by the Supplier, emphasizing the outreach and recruitment activity undertaken to attract EE and other minority candidates. <p>The Supplier should also provide:</p> <ul style="list-style-type: none"> f) The reference contact name, e-mail address and telephone number of the client, for verification undertaken. <p><i>The searches provided for MT4 must be different from the searches provided for MT2 and MT3.</i></p>
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2.0 Point Rated Technical Criteria

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

Arrangements which fail to obtain the required minimum number of points specified will be declared non-responsive. Each point rated technical criterion should be addressed separately.

#	Point Rated Technical Criterion	Maximum Points available	Required Minimum Number of Points
RT1	Supplier's Experience	31	23.25
RT2	Supplier's approach to meet the requirement	40	30
RT3	Summary Report	55	41.25
Maximum available points			126
Minimum points required (126 X 75%)			94.5

RT1 – Supplier's experience			
Number	Criteria	Supplier Preparation Instructions	Points
RT1	The Supplier should demonstrate that it has experience and expertise in the private and/or public sector to successfully deliver the requirements detailed in Annex A - Statement of Work.	<p>In order to demonstrate, the Supplier should provide the following:</p> <p>a) <u>its organization</u>, including experience in the field of providing executive search services, the number of employees, its primary office and other proposed service locations (if any).</p> <p>Rating scale: Offices located in a major city in one to 5 Canadian Provinces – (4 points)</p> <p>or</p> <p>Offices located in a major city in over 5 Canadian Provinces – (5 points)</p> <p>And</p> <p>Additional point: Offices located in a major city in countries other than Canada – add (one point).</p>	Maximum of 6 points
		<p>b) <u>Its sectorial areas of expertise</u> as demonstrated by successfully completed executive search contracts in the last 5 years.</p> <p>Rating Scale: Breadth: Examples of successfully completed executive search contracts across up to 10 distinct sectors (as defined by NAICS) (3 points)</p> <p>or</p> <p>Breadth: Examples of successfully completed executive search contracts across 11 to 20 distinct sectors (as defined by NAICS). (9 points)</p> <p>or</p> <p>Breadth: Examples of successfully completed executive search contracts across more than 20 distinct sectors (as defined by NAICS). (10 points)</p> <p>And</p> <p>Depth: More than 5 examples of successfully completed executive search contracts in one specialized sector (as defined by NAICS), or 5 examples of executive search contracts for Diversity and Employment Equity. (3 points)</p>	Maximum of 20 points

		<p>or</p> <p>Depth: More than 10 examples of successfully completed executive search contracts in one specialized sector (as defined by NAICS), or 10 examples of executive search contracts for Diversity and Employment Equity. (9 points)</p> <p>or</p> <p>Depth: More than 15 examples of successfully completed executive search contracts in one specialized sector (as defined by NAICS), or 15 examples of executive search contracts for Diversity and Employment Equity. (10 points)</p>	
		<p>c) what makes its organization stand out from their competitors: The Supplier should provide copies of recognition or awards received.</p> <p>Rating Scale: Evidence of impartial recognition as an industry leader in the last 5 years – one point for each distinct recognition, award or industry ranking.</p> <p>And/or Evidence of customer satisfaction in the last 5 years – one point for each client testimonial provided.</p>	<p>Maximum of 5 points</p>
Maximum points available for RT1			31
Minimum Points Required for RT1 (31 X 75%)			23.25

RT2 – Supplier's Approach to Meet the Requirement			
Number	Criteria	Supplier Preparation Instructions	Points
RT2	The Supplier should demonstrate its approach to successfully deliver the requirements detailed in Annex A - Statement of Work.	<p>In order to demonstrate its approach the Supplier should include a detailed description of:</p> <p>a) Its approach for all phases, as indicated in the SOW, of their executive search for private and/or public sector executive senior leadership positions including from request by an Identified User to successful placement of a GiC position. The Supplier should provide sufficient detail to allow for a complete and full understanding of how all tasks will be carried out.</p> <p>Rating Scale: Supplier does not provide information for its approach for executive search. (0 points)</p> <p>or</p> <p>Supplier provides broad or general information, explaining the service that would be provided.(10 points)</p>	<p>Maximum of 15 points</p>

		<p>or</p> <p>Supplier provides detailed information that clearly and succinctly explains the service that would be provided, detailing their approach and tools used, as applicable. (15 points)</p>	
		<p>b) Its approach and actions taken in the event of an unsuccessful search. Provide an indication of your success rate, and explain how you approach the concept of “guaranteed performance”, as per section 4.4 of the SOW.</p> <p>Rating Scale: Supplier does not provide information for its approach for the concept of “guaranteed performance”. (0 points)</p> <p>or</p> <p>Supplier provides broad or general information regarding its approach for the concept of “guaranteed performance” e.g. agrees with concept but does not provide approach or strategy. (5 points)</p> <p>or</p> <p>Supplier provides detailed information regarding its approach for the concept of “guaranteed performance” e.g. agrees with concept and provides steps or examples of approach or strategy. (10 points)</p>	<p>Maximum of 10 points</p>
		<p>c) its creative and innovative approach to ensuring searches for private and/or public sector executive senior leadership positions are successful, while efficient and cost effective.</p> <p>Rating Scale: Supplier does not provide information regarding its approach to ensure executive searches are successful, while efficient and cost effective – (0 points)</p> <p>or</p> <p>Supplier provides broad or general information regarding its approach to ensure executive searches are successful, while efficient and cost effective e.g. agrees with concept but does not provide details. (2 points).</p> <p>or</p>	<p>Maximum of 5 points</p>

		Supplier provides detailed information regarding its approach to ensure executive searches are successful, while efficient and cost effective e.g. agrees with concept and provides examples of approach or strategy that increase efficiency and provide cost savings. (5 points)	
		<p>d) its approach to ensuring diversity in the recruitment of high potential candidates, including describing how you apply an Employment Equity (EE) lens.</p> <p>Rating scale: Supplier does not provide information for its approach to ensuring diversity in the recruitment of high potential candidates, including describing how it applies an EE lens. (0 point)</p> <p>or</p> <p>Supplier provides broad or general information regarding its approach to ensuring diversity in the recruitment of high potential candidates, including describing how it applies an EE lens. (5 points)</p> <p>or</p> <p>Supplier provides detailed information regarding its approach to ensuring diversity in the recruitment of high potential candidates including describing how it applies an EE lens. (10 points)</p>	Maximum of 10 points
Maximum points available for RT2			40
Minimum Points Required for RT2 (40 X 75%)			30

RT3 – Summary Report			
Number	Criteria	Supplier Preparation Instructions	Points
RT3	The Supplier should demonstrate their approach to summarizing an executive search for a senior leadership position in a Final Report.	In order to demonstrate their approach, Suppliers should provide a sample (e.g. an anonymized report) for a successfully completed executive search for a senior leadership position. The report should demonstrate the level and kind of effort undertaken, and the value added service received by the client.	
		<p>a) Summary of the Supplier's approach/workplan for different significant activities as outlined in Statement of Work, including dates that activities were conducted;</p> <p>Rating Scale: Supplier does not provide information for its approach/workplan for the different activities as listed in Statement of Work related to the executive search (0 points)</p> <p>or</p>	Maximum of 10 points

		<p>Supplier provides broad or general information that explains the service that will be provided, regarding its approach/workplan to the different activities as listed in Statement of Work related to the executive search. (5 points)</p> <p>or</p> <p>Supplier provides detailed information that explains clearly and succinctly the service that the Supplier provided, detailing their approach, methods and tools used, as applicable, regarding its approach/work plan to the different activities as listed in Statement of Work related to the executive search, and comprehensively addresses all deliverables in the SOW. (10 points)</p>	
		<p>b) List of Selection Committee and other participants in the executive search</p> <p>Rating Scale: Supplier does not provide information regarding the Selection Committee and other participants. (0 points)</p> <p>Or</p> <p>Supplier provides broad or general information regarding the Selection Committee and other participants e.g. name, and role in the process. (2 points)</p> <p>or</p> <p>Supplier provides detailed information regarding the Selection Committee and other participants. e.g. name, title, organization and role in the process. (5 points)</p>	<p>Maximum of 5 points</p>
		<p>c) Advertising and outreach strategy</p> <p>Rating Scale: Supplier does not provide information regarding its approach to advertising and outreach strategy. (0 points)</p> <p>or</p> <p>Supplier provides broad or general information that explains the service that will be provided, regarding its approach to advertising and outreach strategy. (5 points)</p> <p>or</p> <p>Supplier provides detailed information that explains clearly and succinctly the service that the Supplier</p>	<p>Maximum of 10 points</p>

		<p>provided, detailing their approach, methods and tools used, as applicable, regarding its approach advertising and outreach strategy e.g. what organizations Supplier reached out to and rationalisation, date and type of advertising (publication, website, eblast), where advertised, copy of advertisement; market feedback (positive and challenges encountered), etc. (10 points)</p>	
		<p>d) List of candidates in the executive search</p> <p>Rating scale: Supplier does not provide information regarding the candidates. (0 points)</p> <p>or</p> <p>Supplier provides broad or general information regarding the candidates e.g. name, title organization. (5 points)</p> <p>or</p> <p>Supplier provides detailed information regarding the candidates e.g. name, title, organization; identifies individuals brought forward by Supplier; identifies if individual meets any EE requirements; identifies highest stage candidate reached (starting with interview stage) in the process, etc. (10 points)</p>	<p>Maximum of 10 points</p>
		<p>e) References (without attribution to specific referees)</p> <p>Rating scale: Supplier does not provide summary of the references (0 points)</p> <p>or</p> <p>Supplier provides broad or general summary regarding the candidates provided by referees e.g. identifies referees (name, title), traits (positive and negative). (5 points)</p> <p>or</p> <p>Supplier provides detailed summary regarding the candidates e.g. identifies referees (name, title, organization and relationship to candidates including number of years), traits (including developmental observations), identifies if observation was by one or a few referees or was a consensus and observations from referees regarding suitability for the position, etc. (10 points)</p>	<p>Maximum of 10 points</p>

Solicitation No. - N° de l'invitation
 EN578-210666/A
 Client Ref. No. - N° de réf. du client

Amd. No. - N° de la modif.
 File No. - N° du dossier
 104zl.EN578-210666

Buyer ID - Id de l'acheteur
 104zl
 CCC No./N° CCC - FMS No./N° VME

		f) Poster describing the position Rating Scale Supplier does not provide copy of the poster. (0 points) Or Supplier provides a copy of the poster. (5 points)	Maximum of 5 points
		g) Invoices related to the executive search Rating Scale: Supplier does not provide copy of the invoices (0 points) or Supplier provides a copy of the invoices. (5 points)	Maximum of 5 points
Maximum points available for RT3			55
Minimum Points Required for RT3 (55 X 75%)			41.25

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Suppliers must provide the required certifications and additional information to be issued a supply arrangement (SA).

The certifications provided by Suppliers to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare an arrangement non-responsive, or will declare a contractor in default if any certification made by the Supplier is found to be untrue whether made knowingly or unknowingly during the arrangement evaluation period, or during the period of any supply arrangement arising from this RFSA and any resulting contracts.

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

5.1 Certifications Required with the Arrangement

Suppliers must submit the following duly completed certifications as part of their arrangement.

5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all suppliers must provide with their arrangement, **if applicable**, the declaration form available on the [Forms for the Integrity Regime](http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html) website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

5.2 Certifications Precedent to the Issuance of a Supply Arrangement and Additional Information

The certifications and additional information listed below should be submitted with the arrangement, but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Supply Arrangement Authority will inform the Supplier of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame provided will render the arrangement non-responsive.

5.2.1 Integrity Provisions – Required Documentation

In accordance with the section titled Information to be provided when bidding, contracting or entering into a real property agreement of the [Ineligibility and Suspension Policy](http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Supplier must provide the required documentation, as applicable, to be given further consideration in the procurement process.

5.3 Additional Certifications Precedent to Issuance of a Supply Arrangement

5.3.1 Status and Availability of Resources

SACC Manual clause [S3005T](#) (2008-12-12) Status and Availability of Resources.

5.3.2 Education and Experience

SACC Manual clause [S1010T](#) (2008-12-12) Education and Experience

PART 6 - SUPPLY ARRANGEMENT AND RESULTING CONTRACT CLAUSES

A. SUPPLY ARRANGEMENT

6.1 Arrangement

The Supply Arrangement covers the Work described in the Statement of Work at Annex A.

6.2 Security Requirements

6.2.1 The following security requirements (SRCL and related clauses provided by the Contract Security Program) apply and form part of the Supply Arrangement.

6.2.1.1 The Contractor must, at all times during the performance of the Supply Arrangement/Contract, hold a valid Designated Organization Screening (DOS) with approved Document Safeguarding at the level of PROTECTED B, issued by the Contract Security Program (CSP), Public Works and Government Services Canada (PWGSC).

6.2.1.2 The Contractor personnel requiring access to PROTECTED information, assets or site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by the CSP, PWGSC.

6.2.1.3 The Contractor MUST NOT utilize its Information Technology systems to electronically process, produce or store PROTECTED information until the CSP, PWGSC has issued written approval. After approval has been granted or approved, these tasks may be performed at the level of PROTECTED B (including an IT Link at the level of PROTECTED B).

6.2.1.4 Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of the CSP, PWGSC.

6.2.1.5 The Supplier must comply with the provisions of the:

- a) Security Requirements Check List and security guide (if applicable), attached at Annex B;
- b) Industrial Security Manual (Latest Edition)

6.2.2 Supplier's Sites or Premises Requiring Safeguarding Measures

6.2.2.1 Where safeguarding measures are required in the performance of the Work, the Supplier must diligently maintain up-to-date the information related to the Supplier's and proposed individuals' sites or premises, for the following addresses:

Street Number / Street Name, Unit / Suite / Apartment Number
City, Province, Territory / State
Postal Code / Zip Code
Country

6.2.2.2 The Company Security Officer must ensure through the [Contract Security Program](#) that the Contractor and individual(s) hold a valid security clearance at the required level.

6.3 Standard Clauses and Conditions

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

6.3.1 General Conditions

2020 (2020-07-01) General Conditions - Supply Arrangement - Goods or Services, apply to and form part of the Supply Arrangement.

6.3.2 Supply Arrangement Reporting

The Supplier must compile and maintain records on its provision of goods, services or both to the federal government under contracts resulting from the Supply Arrangement. This data must include all purchases, including those paid for by a Government of Canada Acquisition Card.

The Supplier must provide this data in accordance with the reporting requirements detailed in Annex C. If some data is not available, the reason must be indicated. If no goods or services are provided during a given period, the Supplier must still provide a "NIL" report.

The data must be submitted on a quarterly basis to the Supply Arrangement Authority. The quarterly reporting periods are defined as follows:

- 1st quarter: April 1 to June 30;
- 2nd quarter: July 1 to September 30;
- 3rd quarter: October 1 to December 31;
- 4th quarter: January 1 to March 31.

The data must be submitted to the Supply Arrangement Authority no later than 15 calendar days after the end of the reporting period.

6.4 Term of Supply Arrangement

6.4.1 Period of the Supply Arrangement

The Supply Arrangement has no defined end-date and will remain valid until such time as Canada no longer considers it to be advantageous to use it.

The period for awarding contracts under the Supply Arrangement begins (***entered at time of issuance***).

6.4.2 Comprehensive Land Claims Agreements (CLCAs)

The Supply Arrangement (SA) is for the delivery of the requirement detailed in the SA to the Identified Users across Canada, excluding locations within Yukon, Northwest Territories, Nunavut, Quebec, and Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirement for deliveries to locations within CLCAs areas within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador will have to be treated as a separate procurement, outside of the supply arrangement.

6.5 Authorities

6.5.1 Supply Arrangement Authority

The Supply Arrangement Authority is:

Sophie Cayer
Supply Team Leader
Project Delivery Services Division ZL
Specialized Professional Services Procurement Directorate

Services and Technology Acquisition Management Sector
Direction générale des approvisionnements | Acquisitions Branch
Public Services and Procurement Canada

Telephone: 613-858-8846
Email: Sophie.Cayer@tpsgc-pwgsc.gc.ca

The Supply Arrangement Authority is responsible for the issuance of the Supply Arrangement, its administration and its revision, if applicable.

6.5.2 Supplier's Representative

(enter at time of issuance)

6.6 Identified Users

The Identified Users include any government department, agency or Crown Corporation listed in Schedules I, I.1, II, III, of the [Financial Administration Act](#), R.S.C., 1985, c. F-11.

6.7 On-going Opportunity for Qualification

A permanent Notice will be posted on the Government Electronic Tendering Service (GETS) to allow new suppliers to become qualified. Existing qualified suppliers, who have been issued a supply arrangement, will not be required to submit a new arrangement.

Arrangements received following the permanent Notice will be evaluated within a minimum evaluation period of 60 calendar days to a maximum of 90 calendar days.

6.8 Priority of Documents

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

- a) the articles of the Supply Arrangement;
- b) the general conditions [2020](#) (2020-07-01) General Conditions - Supply Arrangement - Goods or Services
- c) Annex A, Statement of work;
- d) Annex B, Security Requirements Check List;
- e) the Supplier's arrangement dated *(entered at time of issuance)*.

6.9 Certifications and Additional Information

6.9.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Supplier in its arrangement or precedent to issuance of the Supply Arrangement (SA), and the ongoing cooperation in providing additional information are conditions of issuance of the SA and failure to comply will constitute the Supplier in default. Certifications are subject to verification by Canada during the entire period of the SA and of any resulting contract that would continue beyond the period of the SA.

6.10 Applicable Laws

The Supply Arrangement (SA) and any contract resulting from the SA must be interpreted and governed, and the relations between the parties determined, by the laws in force in (***entered at time of issuance***).

6.11 Transition to an e-Procurement Solution (EPS)

During the period of the Supply Arrangement, Canada may transition to an EPS for more efficient processing and management of individual contracts for any or all of the SA's applicable goods and services. Canada reserves the right, at its sole discretion, to make the use of the new e-procurement solution mandatory.

Canada agrees to provide the Supplier with at least a three-month notice to allow for any measures necessary for the integration of the Supply Arrangement into the EPS. The notice will include a detailed information package indicating the requirements, as well as any applicable guidance and support.

If the Supplier chooses not to provide the supply arrangement of their goods or services through the e-procurement solution, the Supply Arrangement may be set aside by Canada.

6.12 Insurance

G1005C (2016-01-28), Insurance

B. BID SOLICITATION

6.1 Bid Solicitation Documents

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

- Simple, for low dollar value requirements;
- Medium Complexity (MC) for medium complexity requirements;

A copy of the standard procurement template(s) can be requested by suppliers from the Supply Arrangement Authority or the Contracting Authority, as applicable.

Note: References to the MC and Simple templates in PWGSC Requests for Supply Arrangements are provided as examples only. The latest versions of the template and terms and conditions will be used at time of bid solicitation.

The bid solicitation will contain as a minimum the following:

- a) security requirements;
- b) a complete description of the Work to be performed;
- c) 2003, Standard Instructions - Goods or Services - Competitive Requirements; **OR** 2004, Standard Instructions - Goods or Services - Non-competitive Requirements;

Subsection 3.a) of Section 01, Integrity Provisions - Bid of the Standard Instructions (insert, as applicable: 2003 or 2004) incorporated by reference above is deleted in its entirety and replaced with the following:

- i. at the time of submitting an arrangement under the Request for Supply Arrangements (RFSA), the Bidder has already provided a list of names, as requested under the *Ineligibility and Suspension Policy*. During this procurement process, the Bidder must immediately inform Canada in writing of any changes affecting the list of directors."
- d) bid preparation instructions;
 - e) instructions for the submission of bids (address for submission of bids, bid closing date and time);
 - f) evaluation procedures and basis of selection;
 - g) certifications;
 - i. **Federal Contractors Program (FCP) for Employment Equity - Notification**

SACC Manual A3005T, A3010T for service requirements when specific individuals will be proposed for the work;
 - ii. **Integrity Provisions - Declaration of Convicted Offences;**
- i) conditions of the resulting contract.

6.2 Bid Solicitation Process

6.2.1 Bids will be solicited for specific requirements within the scope of the Supply Arrangement (SA) from Suppliers who have been issued a SA.

6.2.2 The bid solicitation will be sent directly to all suppliers.

As a minimum, invited suppliers will be given a minimum of 5 working days to submit a bid in response to a bid solicitation. The time limit for bidding may be extended based upon the complexity of the requirement.

6.2.3 The responsibility for the bid solicitation process and the award of contracts is the identified user only.

6.2.4 The following forms must be used for the first page of the bid solicitation document and the first page of the resulting contract document.

PWGSC-TPSGC 9400-3, Bid Solicitation
PWGSC-TPSGC 9400-4, Contract

These forms are available on the [Electronic Forms Catalogue](http://publiservice-app.tpsgc-pwgsc.gc.ca/forms/text/search_for_forms-e.html) (http://publiservice-app.tpsgc-pwgsc.gc.ca/forms/text/search_for_forms-e.html) website.

C. RESULTING CONTRACT CLAUSES

6.1 General

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

For any contract to be awarded using the template:

- (a) **Simple** (for low dollar value requirements), general conditions [2029](#) will apply to the resulting contract;
- (b) **MC** (for medium complexity requirements), general conditions [2010B](#) will apply to the resulting contract;

A copy of the template(s) can be provided upon request by contacting the Strategic Policy Integration Division by sending a query to TPSGC.Outilsdapprovisionnement-ProcurementTools.PWGSC@tpsgc-pwgsc.gc.ca.

Note: References to the MC and Simple templates in PWGSC Requests for Supply Arrangements are provided as examples only. The latest versions of the template and terms and conditions will be used at time of bid solicitation.

ANNEX A

STATEMENT OF WORK

1. TITLE

Executive search services for senior leadership positions in the Canadian public sector including Governor in Council (GiC) appointees.

1.1 Objective

To provide executive search services, including executive search for senior leadership and critical positions (regional, national or international in scope), to support the Government in its identification, recruitment and assessment of high potential and diverse candidates to fill senior leadership positions in the Canadian public sector including GiC appointees.

1.2 Background

Senior leadership positions in a public sector organization include:

- a) Heads or chief executive officers of Crown Corporations (GiCs);
- b) Agents and Officers of Parliament (GiCs);
- c) Heads and Chairs of government organizations, boards, tribunals or commissions (GiCs)
- d) Senior leadership positions in the core public service (GiCs & EX), and their equivalents across all orders of government)

GiC appointees have a direct impact on the lives of citizens and make a significant contribution to Canadian society. More than 2,000 individuals are appointed by the GiC, meaning by the Governor General acting on the advice of the Queen's Privy Council for Canada as represented by Cabinet

The Government is also striving for gender parity, and seeks to ensure that Indigenous peoples, persons with disabilities, and visible and other minority groups are properly represented in positions of leadership. Government of Canada recruitment strategies seek to attract qualified candidates who reflect Canada's diversity in terms of linguistic capacity (the Government considers bilingual proficiency as part of its assessment of candidates), regional representation and age demographics, as well as employment equity designated groups.

1.3 Terminology

Diverse / Diversity	Women, Indigenous peoples, persons with disabilities and members of visible minorities constitute Employment Equity (EE) groups, and diversity of representation ensures that EE and other minorities (LGTBQ2, and ethnic and cultural groups) are properly represented in positions of leadership, reflective of the Canadian population as a whole.
Executive Search	A specialized recruitment service used to seek out and recruit high potential candidates for senior-level positions.
Senior-level positions	Leadership positions and critical positions for federal agencies, boards, quasi-judicial tribunals, commissions, Crown corporations, agents and officers of Parliament.

2. REFERENCE DOCUMENTS

The Government of Canada's policies and publications pertaining to the GiC appointments process can be accessed on the following websites, and will serve as useful resources.

-
- a) Open and Accountable Government (2015): <https://pm.gc.ca/en/news/backgrounders/2015/11/27/open-and-accountable-government>
 - b) Governor in Council Appointments Process Overview: <https://www.canada.ca/en/privy-council/programs/appointments/governor-council-appointments/general-information/appointments.html>
 - c) Governor in Council Appointments Website: <https://www.canada.ca/en/privy-council/topics/appointments/governor-council.html>
 - d) Canadian Human Rights Act: <http://laws-lois.justice.gc.ca/eng/acts/H-6/FullText.html>
 - e) Official Languages Act: <http://laws-lois.justice.gc.ca/eng/acts/O-3.01/FullText.html>
 - f) Accessible Canada Act: <https://laws-lois.justice.gc.ca/eng/acts/A-0.6/>

3. REQUIREMENT

3.1 Scope of work

The contractor must provide executive search services for leadership positions and critical positions for federal agencies, boards, quasi-judicial tribunals, commissions, Crown corporations, agents and officers of Parliament, including GiC appointees.

3.1.1 Prerequisite work

The Contractor must perform prerequisite work to support an efficient and effective executive search:

- a) establish a thorough understanding of the Government of Canada's approach to GiC appointments and/or other senior leadership positions and its legislative requirements in regards to official languages and the duty to accommodate;
- b) establish a thorough understanding of the identified user, that is the organization in respect of which the proposed GiC appointments and/or other senior leadership position(s) in the Canadian public sector relate, including its priorities and challenges;
- c) be prepared to propose a profile of the ideal candidate for the position in the organization to a selection committee prior to the initiation of the selection process; and
- d) conduct an environmental review consisting of labour market statistics and availability, demographic data, and information related to the pertinent industry or community of practice (i.e. average compensation levels and other industry-specific data).

3.1.2 Collaboration

The Contractor must work with the Project Authority (PA) (and/or their delegate) to:

- a) review the contract, clarify expectations and table the prerequisite work identified above (i.e. Kick-off meeting);
- b) develop and implement a work plan detailing a systematic and comprehensive research, search and recruitment strategy; and document communications and questions from candidates in order to be in a position to report on issues (i.e. COI, remuneration, location of work, etc.) raised by short-listed candidates;
- c) provide administrative support, ensuring that all documentation is developed per agreed to standards, and shared in advance of meetings with the selection committee, from the launch call through to final de-brief;

-
- d) pre-screen candidates using approved methodologies;
 - e) prepare an evaluation meeting (only required when a written exam is used);
 - f) prepare a long list review meeting;
 - g) Administer a Self-Assessment evaluation to all candidates short-listed by the selection committee;
 - h) summarize screening and assessment activities in a preliminary report to support decision-making by the selection committee;
 - i) prepare and coordinate interviews;
 - j) conduct reference checks by phone, as well as education and employment (credential) checks of finalist candidates, and arrange for other tangible services such as language and psychometric testing, as directed by the Chair of the Selection Committee (delegated PA);
 - k) provide, prior to de-brief call, all references conducted (as well as a reference summary), the results of the credential checks, and an update on the logged calls with short-listed candidates, if applicable;
 - l) prepare a draft Final Report summarizing the results of the search and recruitment effort, including data on outreach, consultations and in-depth engagement; reporting on all communications with short-listed candidates; reporting on considerations to address challenges and opportunities encountered in the field; and including all referee names and reference summaries (without attribution to specific referees) for each finalist, following the de-brief call of the selection committee,; and
 - m) return or destroy all Personal Information (as defined by the Privacy Act) collected on behalf of the Government of Canada under this contract, once the Final Report has been verified and accepted by the PA.

3.2 TASKS AND DELIVERABLES

For all applicable tasks the contractor must work with the PA (or their delegate), in the order prescribed by the PA (or their delegate) during the Kick-off Call described in article 3.2.1.1 of the Statement of Work.

3.2.1 PHASE ONE – PLANNING AND INITIATION

3.2.1.1 Kick-off Call – Contract review and communication of expectations

Within 2 weeks of the contract awarded date, the Contractor must participate in a Kick-off Call with the PA (or their delegate).

The Kick-off Call will be scheduled by the PA (or their delegate).

3.2.1.2 Development of the outreach strategy

The Contractor must develop a proposed outreach strategy to support the identification and recruitment of high potential and diverse candidates.

The outreach strategy must include:

- a) a list of target markets, regions, associations and individuals deemed suitable for consideration, taking into account official language requirements, diversity and employment equity;
- b) an Executive Brief that will be used to provide information to all interested candidates; and
- c) a proposal, including a return-on-investment and other considerations, regarding the advisability of paid on-line and print advertising.

If applicable the Contractor must include in their outreach strategy advertisement mock-ups in both official languages for newspapers, bulletins, professional association journals or selected publications, relevant association websites, and electronic job advertising sites, among others.

Deliverable:

Comprehensive draft outreach strategy provided to the PA (or delegate) within one week of the kick-off call.

3.2.1.3 Development of a work plan

The Contractor must develop a proposed work plan to guide the sequencing of key activities in the selection process.

The work plan must include, but is not limited to:

- a) a critical path that presents timing for each deliverable or meeting of the selection committee, namely:
 - i. implementation of the outreach strategy, including timeframe in the field (“in market”),
 - ii. Launch Call,
 - iii. Evaluation Call (if applicable; applies to selection processes for administrative tribunals only),
 - iv. written exam administration (if applicable; applies to selection processes for administrative tribunals only),
 - v. Long List Review Call or Meeting (must be in-person if a written exam has been administered; applies to selection processes for administrative tribunals only),
 - vi. Interviews, reference and credential checks and other applicable assessments, and
 - vii. Debrief Call.
- b) a description of the outreach tactics employed (eg. E-mail blast target community-of-practice, etc.)
- c) a description of the Contractor’s assessment and screening methodologies;
- d) a description of the contractor’s practice of documenting all calls received, noting questions raised, and committing to bring forward the “call log”, as required, to the attention of the PA and selection committee Chair; and
- e) a list of the Contractor’s and selection committee members’ contact information.

Deliverable:

Draft work plan to be provided to the PA (or delegate) within one week of the kick-off call.

3.2.1.4 Coordinate Launch Call and prepare Launch Packages

The Contractor must schedule the Launch Call and send invitations electronically to participants. The Launch Call may be a teleconference or an in-person meeting. If the former, the Contractor’s teleconference line must be used; if the latter, the meeting must be hosted by the Contractor at its premises, or at a location approved by the PA (or their delegate).

The Launch Package must include, but is not limited to:

- a) a meeting agenda that includes the name of the lead for each item;
- b) the Organization Profile for the organization to which appointments are planned;
- c) the eligibility factors and conditions of employment stipulated in the Notice of Appointment Opportunity (presented as a separate, stand-alone document);
- d) any legislative provisions for appointments to the organization;
- e) the Board Profile (for Crown corporations only);
- f) the Board Skills Matrix (for Crown corporations only), which will be provided by the PA (or their delegate) as supplied by the organization;
- g) the final draft work plan described in article 3.2.1.3 of the Statement of Work;
- h) the final draft outreach strategy described in article 3.2.1.2 of the Statement of Work; and
- i) the Notice of Appointment Opportunity; If the Notice of Appointment Opportunity has not yet been published online, a copy can be provided by the PA (or their delegate).

The approved Launch Package will be distributed to selection committee members electronically via the Government of Canada's own secure online portal, or in hard copy format, if prior approval received from PA. In either case, appropriate precautions and measures must be taken to maintain the security of the Launch Package.

Deliverable:

3 hard copies must be provided to the PA (or their delegate) at least 5 business days in advance of the Launch Call.

3.2.1.5 Finalize work plan

Based on direction, guidance and feedback provided to the Contractor by the PA (or their delegate) following the Launch Call, the Contractor must finalize the proposed work plan. The revised work plan should replace the draft version previously distributed by the Contractor to selection committee members.

3.2.1.6 Finalize and implement outreach strategy

Based on direction, guidance and feedback provided to the Contractor by the PA (or their delegate) during or following the Launch Call, the Contractor must finalize the proposed outreach strategy. The revised outreach strategy should replace the draft version previously distributed by the Contractor to selection committee members.

The Contractor must execute the approved outreach strategy, including by contacting target markets, regions, associations and individuals to determine interest and suitability.

When recruiting candidates for GiC appointments, the Contractor must emphasize the requirement to create an applicant profile on the GiC Appointments website (<https://www.canada.ca/en/privy-council/topics/appointments/governor-council.html>). Only candidates who have applied online will be eligible for consideration by the selection committee members at any point of the selection process.

3.2.1.7 Prepare outreach update reports

The Contractor must report regularly to the PA (or their delegate) confirm that implementation of the outreach strategy is generating expected results. The Contractor must report on any questions (regarding the process, conflict of interest, eligibility requirements, compensation, etc.) asked by applicants (the Contractor should keep a log of all such questions posed by applicants).

The Contractor must present – verbally or in writing, as determined at the Kick-off Call – outreach update reports that must include at minimum a description of work undertaken within the reporting period, including the number and diversity of candidates recruited, as well as any considerations and next steps.

3.2.1.8 Summarize Phase One – Planning and Initiation

The Contractor must draft a written summary of Phase One activities and meetings. Noting that the Contractor must submit a final report to the PA at the conclusion of the selection process, the Contractor may integrate a revised version of this summary into the final report described in article 3.2.4.2 of the Statement of Work.

The summary must be comprehensive as it will be used by the selection committee to determine if the Notice of Appointment Opportunity should be extended or not. The summary must include, but is not limited to, the following information:

- a) details demonstrating a systematic, comprehensive and value-added research, search and recruitment methodology;
- b) information describing the results of each search and recruitment method used, including data on the outreach, consultations, and number and diversity of individuals reached;
- c) information from the call log history;
- d) information on any particularities of the selection process requiring consideration to address challenges and opportunities encountered in the field;
- e) an attestation documenting that official language obligations were satisfied, including an active offer to communicate in the preferred official language of the prospective candidate; and
- f) a description of any advertising strategies employed, if applicable. If advertising was required, copy of the actual advertisement placed must be provided.
 - i. If advertisement was placed on website, a screenshot of the ad must be provided
 - ii. If advertisement was is print media, a copy of the advertisement must be provided
 - iii. If email blast, names of PA (and delegate) should be seeded in the list, as confirmation of activity undertaken

Deliverable:

Written summary of Phase One activities and meetings

3.2.2 PHASE TWO – SCREENING AND ASSESSMENT

3.2.2.1 Pre-screen applicants

Using the prescribed Preliminary Application Review worksheet, the Contractor must pre-screen all applicants against the education and experience selection criteria developed for the position, and must do so regularly and as frequently as requested by the PA (or their delegate), in particular during the Launch Call described in article 3.2.1.4 of the Statement of Work.

Using the prescribed reports, the Contractor must document pre-screening results for each candidate. Upon accessing the template via our online System, the Contractor must populate necessary fields on the worksheet, including the education and experience column headers.

Each applicant must be screened against every education and experience selection criterion, including any asset criteria, regardless of whether or not the applicant meets some or all of the criteria. The Contractor must indicate whether the applicant meets or does not meet each criterion; where an assumption is made on the part of the Contractor, this assumption must be noted with an asterisk, and must be briefly summarized in the comment column on the long list report. In addition, the Contractor must include a brief summary of each applicant's qualifications in the comment column on the long list report.

Deliverable:

Long list of pre-screened applicants.

3.2.2.2 Identify high-potential applicants

If applicable, the Contractor must conduct a more in-depth preliminary assessment of high-potential applicants in addition to the pre-screening described in article 3.2.2.1 of the Statement of Work, and present the results in individual applicant summaries. Consideration should be given to implementing a self-assessment questionnaire to all identified high potential candidates. This consideration will be discussed at the kick-off call.

The Contractor must present the results of its in-depth preliminary assessment in the form of a written applicant summary. High-potential applicant summaries should include, but are not limited to:

- a) The self-assessments provided by applicants;
- b) the Contractor's overall impression of the applicant;
- c) the applicant's suitability when assessed against the selection criteria (at minimum, the education and experience criteria);
- d) the applicant's career highlights and achievements; and
- e) the applicant's relevant skills and/or qualifications.

If relevant, the summary could also include the applicant's salary expectations and availability. The summary should not include, however, the Contractor's recommendation on next steps for the applicant.

3.2.2.3 Coordinate Evaluation Call and prepare Evaluation Packages (applies only to selection processes for administrative tribunals)

The Contractor must schedule the Evaluation Call and send invitations electronically to participants. The Evaluation Call may be a teleconference or an in-person meeting. If the former, the Contractor's teleconference line must be used; if the latter, the meeting must be hosted by the Contractor at its premises, or at a location approved by the PA (or their delegate).

The Evaluation Package must include, but is not limited to:

- a) a meeting agenda that includes the name of the lead for each item;
- b) the completed long list report, which should include all applicants – not just those who were pre-screened in;
- c) applicant summaries (if applicable); and

- d) a draft written exam, which will be provided to the Contractor in hard copy only by the PA (or their delegate).

Evaluation Package should be distributed to selection committee members electronically via the Government of Canada's own secure online portal, or in hard copy format (if approved by the PA). In either case, appropriate precautions and measures must be taken to maintain the security of the Evaluation Package.

Deliverable:

3 hard copies of the Evaluation package must be provided to the PA (or their delegate) at least 5 business days in advance of the Evaluation Call.

3.2.2.4 Record results of Evaluation Call (applies only to selection processes for administrative tribunals)

The Contractor must record the decisions of the selection committee as they pertain to the applicants whom the committee would like to advance to the written exam stage of the selection process. The Contractor must provide this record of decision to the PA (or their delegate) within one business day of the Evaluation Call so that the latter may make necessary arrangements for the administration of the written exam.

3.2.2.5 Prepare draft interview questions

The Contractor must develop up to 8 questions to be posed to candidates during interviews. The questions must be aligned with the selection criteria pertaining to knowledge, skills and abilities, as well as any other strategic considerations raised by the PA (or their delegate).

The Contractor must draft the interview questions in both official languages. The template to be used will be provided by the PA (or their delegate), and will include pre-populated standard questions in addition to the ones that the Contractor is responsible for developing.

3.2.2.6 Coordinate Long List Review Call/Meeting and prepare Long List Review Packages

The Contractor must schedule the Long List Review Call/Meeting and send invitations electronically to participants. The Long List Review Call/Meeting may be a teleconference or an in-person meeting. If the former, the Contractor's teleconference line must be used; if the latter, the meeting must be hosted by the Contractor at its premises, or at a location approved by the PA (or their delegate).

The Long List Review Package must include, but is not limited to:

- a) a meeting agenda that includes the name of the lead for each item;
- b) the completed long list report, which should include all candidates – not just those who were pre-screened in;
- c) applicant summaries (if applicable – i.e., if no Evaluation Call took place); and
- d) draft interview questions.

The approved Long List Review Package should be distributed to selection committee members electronically via the Government of Canada's own secure online portal, or in hard copy format (if approved by the PA). In either case, appropriate precautions and measures must be taken to maintain the security of the Long List Review Package.

If a written exam is administered, PCO is responsible for the implementation, marking and data capturing of results of the exam in the selection committee screening report associated with the online portal. PCO officials will be responsible for providing the exam results and material to the Contractor in the manner prescribed at the kick-off meeting.

If directed by the PA (or their delegate), additional Long List Review Calls/Meetings must be coordinated by the Contractor until such a time as no further meetings of this nature are deemed necessary by the PA (or their delegate) and/or selection committee members. Should such calls/meetings be required, the aforementioned Long List Review Packages must be updated and re-distributed.

Deliverable:

3 hard copies must be provided to the PA (or their delegate) at least 5 business days in advance of the Long List Review Call/Meeting.

3.2.2.7 Record results of Long List Review Call/Meeting

The Contractor must record the decisions of the selection committee as they pertain to the applicants whom the committee would like to advance to the interview stage of the selection process. The Contractor must provide this record of decision to the PA (or their delegate) within one business day of the Long List Review Call/Meeting so that the latter may validate it and confirm a common understanding.

3.2.2.8 Finalize interview questions

Based on direction, guidance and feedback provided to the Contractor by the PA (or their delegate) during or following the Long List Review Call/Meeting, the Contractor must finalize and translate the draft interview questions.

3.2.2.9 Summarize Phase Two – Screening and Assessment

The Contractor must draft a written summary of Phase Two activities and meetings. Noting that the Contractor must submit a final report to the PA at the conclusion of the selection process, the Contractor may integrate a revised version of this summary into the final report described in article 3.2.4.2 of the Statement of Work.

The summary must include, but is not limited to, the following information:

- a) a full candidate list, which must include an identifier per candidate (such as current position title, last place of work, etc.) to ensure the accurate identification of candidates;
- b) an indication of the candidates who were recruited by the Contractor;
- c) confirmation of list all candidates (related to GiC appointments only) that applied online on the GiC Appointments website (<https://www.canada.ca/en/privy-council/topics/appointments/governor-council.html>); and
- d) an indication of which candidates are advancing to the interview phase.

Deliverable:

Written summary of Phase Two activities and meetings

3.2.3 PHASE THREE – INTERVIEWS AND FURTHER ASSESSMENTS

3.2.3.1 Coordinate interviews

The Contractor must schedule blocks of time during which interviews will take place, and must send invitations electronically to participants.

The Contractor must then communicate with each candidate by phone before sending an electronic interview invitation. The invitation should include relevant information about the interview and ancillary matters. An interview invitation template will be provided by the PA (or their delegate).

The Contractor must ensure that candidates provide the following information prior to interviews:

- a) written confirmation of their preferred official language for their interview, which should have been discussed over the phone;
- b) written confirmation of and evidence for any accommodation measures needed, which should have been discussed on the phone;
- c) the full name and title, phone number and email address for 6 references (employer, colleague and employee – 2 for each), as well as their relationship to the candidate;
- d) an electronic copy of the completed, signed and dated Background Check Consent Form; and
- e) an electronic copy of the completed, signed and dated Candidate Declaration Form, a blank version of which will be provided to the Contractor by the PA (or their delegate).

Following receipt of items (d) and (e) above, the Contractor must send copies to the PA (or their delegate). (Reminder: all such personal information received by the Contractor must be returned to the Government of Canada or destroyed upon completion of the contract).

In person interviews

These interviews must be hosted by the Contractor at its premises, or at a location approved by the PA (or their delegate).

Remote interviews

In consultation with the PA, the Contractor must make necessary logistical, technical and other arrangements to ensure a smooth experience for the selection committee and candidates alike. The Contractor must also make arrangements – internally and with candidates – to test the technology prior to the date and time of interviews.

3.2.3.2 Prepare draft reference questions

The Contractor must develop 8 or more questions to be posed to referees. The questions must be aligned with the selection criteria pertaining to knowledge, skills, abilities and personal suitabilities, as well as any other strategic considerations raised by the PA (or their delegate).

The Contractor must draft the reference questions in both official languages.

3.2.3.3 Prepare Interview Guides

The Contractor must ensure that Interview Guides are prepared and distributed to selection committee members at least 5 business days in advance of the first day of interviews.

The interview guide must include, but is not limited to:

- a) an interview schedule that includes the date, time and location of interviews, as well as the names, preferred official language (English or French) and province of residence of candidates;

-
- b) a version of the long list report that includes the names, diversity data and qualifications of candidates who have advanced to interview;
 - c) at least one copy of the interview questions in both official languages;
 - d) the cover letters, curricula vitae and completed Candidate Declaration Forms of candidates who have advanced to interview; and
 - e) draft reference questions.

The approved Interview Guide should be distributed to selection committee members electronically via the Government of Canada's secure online portal, but must be provided in hard copy to selection committee members on the first day of interviews, if requested. In both cases, appropriate precautions and measures must be taken to maintain the security of the Interview Guide.

Deliverable:

3 hard copies of the Interview guide must be provided to the PA (or their delegate) at least 5 business days in advance of the first day of interviews.

3.2.3.4 Conduct reference checks and prepare reference summary

The Contractor must contact at least one referee for each of 3 categories (employer, colleague, employee) of referees per candidate, using the approved reference questions and additional probes, if applicable. Contact should be made by telephone.

The Contractor must then prepare a reference report. The report should include each individual reference conducted, with each reference including the name and relationship of the referee to the candidate, and the date the reference was conducted. All individual references, for all candidates, should be included in the reference report.

In addition, a summary or synopsis of the reference report should be developed. This synopsis should serve as an aide to the selection committee, to draw their attention to key reported characteristics that the selection committee had identified as important to the role in question. The synopsis should highlight areas of consensus and/or disagreement amongst referees, and should summarize the key strengths and weaknesses identified.

Importantly, it should not be a simple abridgement or shortening of the original verbatim or long-form references. The names and credentials of referees consulted must be listed in the summary, but without attribution to their specific comments.

The references and summaries may be distributed to selection committee members electronically via the Government of Canada's secure online portal, or in hard copy format, if requested. In either case, appropriate precautions and measures must be taken to maintain the security of the reference material.

Deliverable:

3 hard copies must be provided to the PA (or their delegate) at least 5 business days in advance of the Debrief Call.

3.2.3.5 Validate and document education and employment credentials

The Contractor must conduct an education and employment credentials check to verify the education and employment claims made by the candidate, which could be reasonably construed to be relevant to the position to be filled. For greater clarity, the Contractor generally need not check claims related to high school graduation, or certifications or diplomas clearly outside the scope of the position in question.

The Contractor may use any appropriate means to confirm credentials, such as confirmation of employment and/or education by a current employer in the course of the reference check, or an internet search to confirm Board or other Membership on an organization's website. If the verification cannot be obtained through the public domain, with the prior approval of the PA, the Contractor may engage a third party provider for the education and/or employment check. All such third-party contracts are considered a "cost reimbursable", and prior expenditure authorization of the PA must be sought in these cases.

The results of these credential checks must be presented in a format deemed appropriate for record keeping and easy review by the client, such as a table.

The results summary must include, but is not limited to:

- a) the name of the organization (employment and/or educational institution);
- b) date of employment, diploma(s) or certificate(s)
- c) the result of the credential check and;
- d) the method of verification used
 - i. if verified by telephone the title of the person or department contacted,
 - ii. if obtained in the public domain, the webpage (or similar confirming document) must be provided
 - iii. if third party was used, name of the third party and a copy of the report must be provided

These results must be available to the selection committee for the de-brief meeting, and must be attached as an Annex in the Final Report.

3.2.3.6 Coordinate "Other Tangible and Related Services"

The Contractor must provide other tangible and related services that would add value to the search process, as requested, including but not limited to:

a) Psychometric assessments

As directed by and in consultation with the PA (or their delegate), the Contractor must arrange for psychometric assessments for select finalist candidates and schedule subsequent debriefings.

b) Second language evaluations

As directed by and in consultation with the PA (or their delegate), the Contractor must coordinate the scheduling and administration of second language evaluations for select finalist candidates.

c) Parliamentary consultations/appearances

As directed by the PA (or their delegate), the Contractor must offer additional services (such as the use of a boardroom, the processing of additional travel claims, etc.) in cases where the finalist candidate is required to appear before parliamentary committees or hearings before their appointment is approved.

3.2.3.7 Coordinate Debrief Call and prepare Debrief Packages

The Contractor must schedule the Debrief Call and send invitations electronically to participants. The Debrief Call may be a teleconference or an in-person meeting. If the former, the PA's (or their delegate's) teleconference line must be used; if the latter, the meeting must be hosted by the PA (or their delegate),

and the Contractor must recuse themselves from selection committee deliberations when directed by the PA (or their delegate).

The Debrief Package must include, but is not limited to:

- a) Full (long-form) reference report for finalist candidates
- b) reference summaries for finalist candidates;
- c) documented confirmation of education and employment credentials; and
- d) results of "other tangible and related services" as applicable.

The approved Debrief Package may be distributed to selection committee members electronically via the Government of Canada's secure online portal, or in hard copy format, if requested. In either case, appropriate precautions and measures must be taken to maintain the security of the Debrief Package.

Deliverable:

3 hard copies must be provided to the PA (or their delegate) at least 5 business days in advance of the Debrief Call.

3.2.3.8 Summarize Phase Three – Interviews and Further Assessments

The Contractor must draft a written summary of Phase Three activities and meetings. Noting that the Contractor must submit a final report to the PA at the conclusion of the selection process, the Contractor may integrate a revised version of this summary into the final report described in article 3.2.4.2 of the Statement of Work.

The summary must include, but is not limited to, the following information:

- a) a detailed summary of further assessments that were required and administered;
- b) reference summaries for each finalist candidate; and
- c) an attestation that candidate education and employment credentials were checked and results shared with the selection committee.

Deliverable:

Written summary of Phase Three activities and meetings

3.2.4 PHASE FOUR – APPOINTMENT

3.2.4.1 Notify all interviewed candidates of the outcome of the selection process

The Contractor must, at a time and date determined by the PA (or their delegate), contact candidates who participated in the interview process by telephone to advise them of the outcome of the selection process, and must record the date, time and outcome of the phone call in a log.

3.2.4.2 Final report

The Contractor must provide the PA (or their delegate) with a written final report of the search process at the conclusion of Phase Four.

The report must contain an outline of the selection process, a full applicant list, the final recommendation and supporting documents as attached appendices. The supporting documents must include reference summaries, copies of advertisements and invoices.

The outline of the selection process must include identification of the selection committee and search team involved, a detailed description of the research, search and recruitment effort and the results obtained (including market feedback, data on outreach, number of individuals contacted and/or referred, consultations, information on logged calls, and challenges and opportunities). The Report should include an attestation that all official language obligations were satisfied, including an active offer to communicate in the preferred language of the candidate for all activities, and an accounting of all meetings and calls in support of the selection process. If applicable, a description of advertising strategies and publication schedules must be included.

The detailed, full applicant list must provide a snapshot of the evolution of the selection process. The list must include an identifier per applicant, such as job position and latest place of work. Further formatting of the list should identify those candidates the Contractor directly reached out to, those selected for the long list, and those selected for the short list.

The Final Report must contain an attestation that appropriate reference checks were completed and candidate education and employment credentials were checked and validated, with results provided to the selection committee at the time of their de-brief meeting. It should also identify those candidates who underwent psychometric or other assessments.

The Final Report must also include the following appendices:

- a) candidate reference report summaries as described in 3.2.3.4 of the Statement of Work;
- b) copies of advertisements used, including the Notice of Appointment Opportunity and any other placed advertisements, if applicable; and
- c) copies of all invoices, including those related to travel, accommodation (including interview rooms) and other logistical support costs are required. Invoices for milestones should include only one milestone per invoice, broken down per costed item.

The Final Report should bring together information from previously prepared summaries, required at the conclusion of Phases 1 through 3, and should not require significant additional drafting.

Deliverable:

Draft Final Report, to be delivered within 3 weeks of de-brief meeting. Final Report is to be delivered within one week of receiving comments on the draft report from the PA.

4. CRITICAL ANCILLARY TERMS AND REQUIREMENTS

4.1 Confidentiality and privacy

Upon execution of the contract and thereafter in perpetuity, the Contractor must protect the integrity of the recruitment, selection and appointment process by maintaining the confidentiality of all information – including documents and discussions – to which the Contractor is made privy, as well as by ensuring that all applicable privacy obligations are respected, including with regard to personal information as defined in the *Privacy Act*. As the Contractor will have access to confidential and sensitive information, the non-disclosure agreement at Annex C must be signed by the Contractor and each of its representatives working on the Contract before access to such information is given.

Confidentiality and privacy with respect to invoices and travel claims: Copies of invoices provided to the Contracting Authority in respect to travel and accommodation of candidates must not identify the candidate by name. Rather, the names and/or other personal information (email or street address, etc.) should be redacted and each candidate identified by number. Notwithstanding this, the PA (or their delegate) must be provided with copies of the invoices with the names of each of the numbered candidates in order to verify the costs.

The Contractor acknowledges that Canada and, in particular, the PA and Contracting Authority, as “government institutions” are bound by the *Privacy Act*. The Contractor will ensure that any personal information obtained in the performance of the Contract is collected, protected, used, disclosed and retained strictly in accordance with the provisions of the *Privacy Act*. This clause will survive the completion of the Contract.

4.2 Official languages requirement

The Contractor acknowledges that Canada and in particular, the PA and Contracting Authority, as “federal institutions” within the meaning of the *Official Languages Act* (OLA) are bound by the OLA and, moreover, under its provisions, any services provided to the public on behalf of Canada by the Contractor must respect the requirements of Part IV of the OLA.

The Contractor must provide its services (written and oral) in both official languages, as required, throughout the project and ensure that its services are of equal quality in both official languages. It is imperative to address candidates and other members of the public, such as references, in written and oral communications with an active offer to communicate in their preferred language. Outreach, recruitment activities and materials and any additional advertising must be developed and implemented in both official languages.

4.3 Accessibility

The Contractor acknowledges that pursuant to the *Canadian Human Rights Act* and the *Employment Equity Act*, the Government of Canada is committed to providing Canadians access to selection processes for appointment opportunities by eliminating any undue barriers to the selection process. The Contractor must therefore provide any necessary accommodation to candidates upon request to ensure their full participation in a selection process. Reasonable accommodation must be made taking into consideration issues of health, safety and cost. Accommodation must also be based on the circumstances of each case and must respect the individual’s right to privacy and confidentiality. Under the exceptional circumstances where the Contractor is of the view that it may not be able to provide such accommodation, it must inform the PA (or their delegate) immediately.

The Contractor must determine if candidates and/or selection committee members have any accommodation needs that must be addressed prior to interviews. Each accommodation request must be supported by appropriate evidence confirming the nature of the barrier faced. The Contractor must engage with the applicant and the PA (or their delegate) to arrive at an appropriate accommodation as expeditiously as possible. Once the Contractor has identified an appropriate accommodation measure, they must confirm in writing with the individual applicant.

4.4 Guarantee non-Performance

The draft Final Report will be prepared following the final selection committee de-brief meeting, but can only be completed, verified and finalized after the date of appointment(s).

Within three (3) months of receiving the draft Final Report, if there has been no appointment, the Government of Canada shall either inform the Contractor that:

- a) further suitable nominees for appointment are required; or
- b) no further search for suitable nominees is required.

If the former, the Contractor must support a further round of activities as described within this contract, or if the latter, the Contractor must submit the Final Report, completing all tasks.

The Contractor must provide one or more alternate candidates if:

- a) the appointee resigns within 12 months of the effective date of the appointment; or
- b) the appointee is terminated for cause within 12 months of the effective date of the appointment.

4.5 “Candidate hands-off” policy

The Contractor must respect a two-year “candidate hands-off” policy. The Contractor cannot approach the appointed candidate resulting from this selection process for other employment and opportunities for a 24 month period beginning on the effective date of the appointment.

4.6 Pre-approvals

Throughout the selection process, the Contractor must consult with the PA (or their delegate) to obtain approval for the following services or actions before distribution or implementation:

- a) outreach and advertising strategies, including communications and advertising products;
- b) information packages (Executive Briefs) intended for candidates;
- c) briefing packages for selection committee meetings and interviews;
- d) candidate travel arrangements/costs; and
- e) procurement of outsourced goods or services such as off-site meeting venues, hospitality, proposed assessment methodologies, location of meetings, expenditures, format of interviews, and bilingual correspondence with selection committee members, as well as any other aspects for which approval is required by the PA

Pre-approval must be sought at least 3 business days in advance of the Contractor taking any action, and the Contractor must not take any action without securing pre-approval from the PA (or their delegate).

4.7 Selection committee meetings, including location

The Contractor must arrange, in consultation with the PA (or their delegate), meetings of the selection committee – which can include teleconferences, videoconferences, in-person meetings and other formats – including developing agendas and all meeting materials, and coordinating logistics (e.g., venue, hospitality, refreshments, etc.).

Meetings and interviews will generally take place in the National Capital Region.

With regard to off-site meeting venues, 3 quotes must be provided by the Contractor to the PA (or their delegate) for consideration.

4.8 Travel and living

Travel may be required by candidates and/or selection committee members, such travel must first be pre-approved by the PA (or their delegate).

5. SUPPORT PROVIDED BY CANADA

Canada will provide the following to the Contractor in order to complete the work:

- a) candidate applications downloaded from the GiC applicant tracking system (related to GiC appointments only);
- b) a template (screening sheet) for the long list report;
- c) the names of finalist candidates who were successful in interviews requiring further assessment, and any details for facilitating the scheduling of assessments;
- d) a template for travel claims, and
- e) the names of finalist candidates to contact once an appointment has been made.

6. CONTRACTOR QUALIFICATIONS

The contractor must propose an Account manager. The Account Manager is responsible for direct communication with the PA and will serve as the key point of contact throughout the executive search process.

The Account manager must meet the following qualifications at minimum:

- a) ability to communicate effectively verbally and in writing in both official languages;
- b) knowledge of recruitment methods, metrics and reporting standards;
- c) Five (5) years' experience as an Executive Search Account Manager; and
- d) an undergraduate degree from a recognized Canadian university or a university recognized by Canada. If the university degree was obtained outside of Canada, it must be approved by a recognized Canadian academic credentials assessment service, which can be identified on the website of the Canadian Information Centre for International Credentials (https://www.cicic.ca/927/identify_the_organization_responsible_for_recognition.canada).

Solicitation No. - N° de l'invitation
EN578-210666/A
Client Ref. No. - N° de réf. du client

Amd. No. - N° de la modif.
File No. - N° du dossier
104z1.EN578-210666

Buyer ID - Id de l'acheteur
104z1
CCC No./N° CCC - FMS No./N° VME

ANNEX B

SECURITY REQUIREMENTS CHECK LIST

See attached pdf.

ANNEX C

SUPPLY ARRANGEMENT REPORTING

At a minimum, the reports must contain the following information:

- a) the client department name;
- b) a description of the requirement;
- c) amount;
- d) the contract period; and
- e) name and contact information of the Project Authority.



Contract Number / Numéro du contrat EN578-210666
Security Classification / Classification de sécurité

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

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE

1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine Privy Council Office	2. Branch or Directorate / Direction générale ou Direction Senior Personnel Secretariat
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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
Executive search services to support the Government in its identification, recruitment and assessment of high potential and diverse candidates to fill senior leadership positions in the Canadian public sector including GiC appointees.
(Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c.)

5. a) Will the supplier require access to Controlled Goods? / Le fournisseur aura-t-il accès à des marchandises contrôlées? No / Non 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? No / Non 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.) No / Non 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. No / Non 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? No / Non 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"/>
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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"/>	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 / SECRET <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET / SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>



PART A (continued) / PARTIE A (suite)

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

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

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

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

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

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

Special comments:

Commentaires spéciaux : _____

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.

REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?
 Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? No / Non Yes / Oui

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

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

PRODUCTION

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

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

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

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



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	SECRET	TOP SECRET	NATO RESTRICTED	NATO CONFIDENTIAL	NATO SECRET	COSMIC TOP SECRET COSMIC TRÈS SECRET	PROTECTED / PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET	
				CONFIDENTIEL		TRÈS SECRET	NATO DIFFUSION RESTREINTE	NATO CONFIDENTIEL			A	B	C				CONFIDENTIEL
Information / Assets Renseignements / Biens Production		✓															
IT Media / Support TI		✓															
IT Link / Lien électronique		✓															

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

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? No / Non Yes / Oui
 La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

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 indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).