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Revision to a Request for Supply Arrangement - Révision à une demande pour un arrangement en matière d'approvisionnement

The referenced document is hereby revised; unless
otherwise indicated, all other terms and conditions of
the Solicitation remain the same.

Ce document est par la présente révisé; sauf
indication contraire, les modalités de l'invitation
demeurent les mêmes.

Comments - Commentaires

Vendor/Firm Name and Address

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Terrasses de la Chaudière 4th Floor
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Title - Sujet Executive search services	
Solicitation No. - N° de l'invitation EN578-210666/B	Date 2021-01-11
Client Reference No. - N° de référence du client 20210666	Amendment No. - N° modif. 002
File No. - N° de dossier 104zl.EN578-210666	CCC No./N° CCC - FMS No./N° VME
GETS Reference No. - N° de référence de SEAG PW-\$SZL-104-38708	
Date of Original Request for Supply Arrangement 2020-11-27 Date de demande pour un arrangement en matière d'app. originale	
Solicitation Closes - L'invitation prend fin at - à 02:00 PM Eastern Standard Time EST on - le 2025-11-25 Heure Normale du l'Est HNE	
Address Enquiries to: - Adresser toutes questions à: Cayer, Sophie	Buyer Id - Id de l'acheteur 104zl
Telephone No. - N° de téléphone (613) 858-8846 ()	FAX No. - N° de FAX () -
Delivery Required - Livraison exigée	
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction:	
Security - Sécurité This revision does not change the security requirements of the solicitation. Cette révision ne change pas les besoins en matière de sécurité de l'invitation.	

Instructions: See Herein

Instructions: Voir aux présentes

Acknowledgement copy required Accusé de réception requis	Yes - Oui <input type="checkbox"/>	No - Non <input type="checkbox"/>
The Offeror hereby acknowledges this revision to its Offer. Le proposant constate, par la présente, cette révision à son offre.		
Signature	Date	
Name and title of person authorized to sign on behalf of offeror. (type or print) Nom et titre de la personne autorisée à signer au nom du proposant. (taper ou écrire en caractères d'imprimerie)		
For the Minister - Pour le Ministre		

This amendment is raised to:

1. Modify the statement of work, to include the missing Employment Equity and Privacy Acts links, as well as providing more emphasis on diversity and employment equity (including asking suppliers to include measures to mitigate against conscious and unconscious bias).

1. DELETE Annex A, Statement of Work in its entirety and REPLACE with the following:

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 as defined in the Employment Equity Act (enacted in 1986). Diversity of representation ensures
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	that EE as well as 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)
- b) [Governor in Council Appointments Process Overview](#)
- c) [Governor in Council Appointments Website](#)
- d) [Canadian Human Rights Act](#)
- e) [Official Languages Act](#)
- f) [Accessible Canada Act](#)
- g) [Employment Equity Act](#); and
- h) [Privacy Act](#).

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, the duty to accommodate, diversity and employment equity (EE);
- 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 and diversity data, and information related to the pertinent industry or community of practice (i.e. average compensation levels and other industry-specific data).

- e) apply a thorough understanding of conscious and unconscious bias (racial, gender, etc.), and identify and take reasonable measures to prevent the possibility of conscious and/or unconscious bias throughout the selection process.

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, written psychometric assessment report(s), 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, which includes strategy details related to diversity and EE 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.) including details on tactics regarding diversity and EE;
- c) a description of the Contractor's assessment and screening methodologies including details on methodologies related to diversity and EE;

- 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.

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- 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 (**Milestone 1 completion point**).

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).

The 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.
- e) an attestation documenting that the Contractor took reasonable measures to mitigate against the possibility of conscious and unconscious bias.

Deliverable: Written summary of Phase Two activities and meetings (**Milestone 2 completion point**).

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). Where travel arrangements are required for selection committee members and/or candidates, the Contractor must provide support and guidance, and communicate Government of Canada directives with regard to travel and accommodation to selection committee members and/or candidates.

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.

d) Education and Employment Credential Checks

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.

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;
- c) an attestation that candidate education and employment credentials were checked and results shared with the selection committee; and,
- d) an attestation that psychometric assessments were conducted and the written reports(s) were shared with the selection committee before debrief meeting.

Deliverable: Written summary of Phase Three activities and meetings (**Milestone 3 completion point**).

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 Report should also identify how diversity and EE requirements were managed during the selection process and include an attestation that the Contractor took reasonable measures to mitigate against the possibility of conscious and unconscious bias throughout the selection process.

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 and psychometrics 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).

4.9 Hospitality

When hospitality is required for selection committee members, such hospitality must first be pre-approved by the Project Authority (or their delegate). Once pre-approval has been secured, the Contractor must make the necessary hospitality arrangements in accordance with the Treasury Board [Directive on Travel, Hospitality, Conference and Event Expenditures](#). **No administration fee may be added to hospitality expenses.**

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 recording candidate assessments;
- 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. TIMEFRAME AND DELIVERABLES

Timeframe and delivery dates will be communicated to the Contractor by the PA (or their delegate) during the Kick-Off Call described in article 3.2.1.1 of the Statement of Work.

7. 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;

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

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104zl
CCC No./N° CCC - FMS No./N° VME

- 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).