

**ADDENDUM #2**

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- 1. Title** Non-Executive Recruitment and Executive Search Services
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- 2. Questions and Answers** Unless otherwise specified, capitalized words and terms have the meaning set out in the RFSO.
- This question and answer section is provided in response to questions received from Suppliers for the above-noted RFSO, and does not amend the terms and conditions of the RFSO.
- Q1. Page 31, #8, specifies that "the Supplier must not indicate "on-going" or other similar wording... A firm completion date...must be shown..." yet, both Service Streams specify that required for both interim and permanent placements are part of the requirements and services of each Stream.**
- If the Supplier is using an engagement for a permanent placement on one of its Reference Engagement Forms, there may not be an end date yet if the person placed on a permanent basis. Our firm has made many permanent placements since January 1, 2015 (the date which CDIC specifies is the earliest date that will be considered for a reference engagement) who are still working with that end client.**
- Can CDIC not consider these placements for reference engagement forms? The way the requirement is worded around the engagement not being considered if the resource is still working there at the time of bid submission means Suppliers can only use interim engagements on their reference forms.**
- A1.** The intent of providing an End Date for a Reference Engagement relating to recruiting search services for permanent placements, is to ensure that Suppliers include Reference Engagements where a candidate has actually been successfully identified and hired under a client's own payroll.
- CDIC is clarifying that for Reference Engagement Forms for Service Category #2 (Non-Executive Permanent Placement) under Service Stream #1, and Service Category #2 (Executive Permanent Placement) under Service Stream #2, the End Date (e.g., completion date) of the Reference Engagement is considered to be when a successful candidate has been hired on the client's own payroll.
- As per Section 8 of Appendix "C-2" (Reference Engagement Form Requirements / Instructions), CDIC would like to clarify and confirm that the Supplier **must not** indicate "on-going" or other similar wording to describe a Reference Engagement that has not yet been completed as the Reference Engagement End Date in the Reference Engagement Form. A firm completion date (i.e., the day, month and year) must be shown for the Reference Engagement that has been completed. Any Reference

Engagement Form with an “on-going” completion date will not be considered for evaluation.

For clarity, a Reference Engagement that is still on-going as at the Proposal Submission Deadline is not considered by CDIC to be eligible to be profiled and **will not** be considered for evaluation.

**Q2. Please clarify if Function #5 – Communications, also includes marketing.**

A2. Yes, Function #5 (Communications) under both Service Stream #1 and Service Stream #2 includes marketing.

**Q3. Section 11. of Schedule “A” states: CDIC intends to enhance its vendor performance management process. This process may consist of new metrics, tools, reports, processes and remedies designed to effectively and efficiently measure, report on and manage the level and quality of service being provided to CDIC.**

**May we request either a PDF, MS-Word copy or hyperlink to CDIC’s current Vendor Performance Management process (VPM) so we may evaluate our current compliance rate prior to CDIC’s enhancement?**

A3. As per Section 11, Vendor Performance Management of Schedule “A” (Statement of Work), of the RFSO, CDIC is intending to enhance its vendor performance management process, and there is no additional information to disclose regarding any existing vendor performance management process.

**Q4. Are we able to bid on only those ‘areas’ we wish to compete for? i.e. In Service Stream 1, Non-Executive Recruitment – is it permissible to bid on only Service Category 2 – Non-executive permanent placement?**

A4. Yes, Suppliers may submit Proposals for one or both Service Categories under a Service Stream, as applicable. Additionally, Suppliers may submit Proposals for one or both of the Service Streams.

As part of Step 1 of Schedule “B” (Evaluation and Selection Process) of the RFSO, CDIC will review the Supplier’s Proposal to identify if Reference Engagement Forms for each Service Category for each Service Stream being offered by the Supplier have been included.

For clarity, the Supplier must provide three (3) completed Reference Engagement Forms for each Service Category being offered under a Service Stream in order for the Supplier’s Offer for that Service Category to be qualified. If the Supplier does not include three (3) completed Reference Engagement Forms for each Service Category, its Proposal, for that Service Category only, will be disqualified.

Suppliers must qualify for at least one Service Category under a Service Stream to be qualified for the Service Stream.

**Q5. Is it our understanding that for each Service Category/Service Stream, we are to submit a full set of documentation per area?**

**a. For example, For Service Category 2 – Executive Search Services, if we are interested in bidding on both Service Streams (1 – Interim placement; 2 – permanent placement) would we then submit as follows:**

- i. **Schedule C – Technical Offer (1 per service stream)**
- ii. **Appendix C-1 – Technical Offer Form (1 per service stream)**
- iii. **Appendix C-2 – Reference Engagement Form (3 per service stream)**
- iv. **Schedule D – Financial offer (1 copy as it covers both service streams)**

A5. As per Schedule “E” (Mandatory Proposal Forms), the following is a list of mandatory forms which must be included in the Supplier’s Proposal, as applicable:

<b>Schedule / Appendix</b>	<b>Submission Form Required</b>
<u>Schedule “C”</u>	Technical Offer (One (1) per Proposal)
<u>Appendix “C-1”</u>	Technical Offer Form (One (1) per Proposal)
<u>Appendix “C-2”</u>	Reference Engagement Form (Three (3) per Service Category)
<u>Schedule “D”</u>	Financial Offer (One (1) per Proposal)
<u>Appendix “D-1”</u>	Financial Offer for Service Stream #1 (One (1) per Proposal)  *NOTE: This Appendix is ONLY required for Suppliers offering a Service Category under Service Stream #1.
<u>Appendix “D-2”</u>	Financial Offer for Service Stream #2 (One (1) per Proposal)  *NOTE: This Appendix is ONLY required for Suppliers offering a Service Category under Service Stream #2.

Also, please see answer to question 4 above for additional clarity relating to Reference Engagement Forms.

**Q6. Ideally, how many firms does CDIC intend to sign standing offers in each Service Stream under each Service Category?**

A6. There is no limit to the number of Suppliers that may be qualified under each Service Stream and/or Service Category.

As per Section 10, Evaluation and Selection, of the RFSO, Proposals will be evaluated in accordance with the competitive process set out in Schedule “B” (Evaluation and Selection Process), leading to the selection of successful Suppliers, each to enter into a Professional Services Agreement with CDIC.

**Q7. Would CDIC accept professional biographies with all information requested vs formal resumes of resources proposed?**

A7. Yes, for RR #3(b) in Section 3 (Rated Requirements) of Appendix “C-1” (Technical Offer Form) of the RFSO, CDIC will accept professional biographies or formal resumes for the proposed key client relationship lead(s) as long as the Suppliers provide the requested information set out in RR#3(b).

**Q8. Non-Executive Recruitment –In our experience, a 12-month guarantee at the non-executive level is quite long; industry standard leans more towards 6 months. Would this be acceptable to CDIC for this Service Category?**

A8. As per Appendix “D-1” (Financial Offer for Service Stream #1) and Schedule “F” (Form of Professional Services Agreement) the guarantee period for Service Stream #1(Non-Executive Recruitment Services) is three (3) months of the effective date of the appointment to a position.

Please see the amendment made to Section 3.1(d) of Schedule “A” (Statement of Work) of the RFSO in Addendum #1 dated January 8, 2021.

**Q9. Section 4. Service Request Process, paragraph 5 - this is not standard process for a retained search firm and speaks more to that of a contingency firm process. Would CDIC be open to removing and/or altering this requirement?**

A9. No, CDIC will not remove and/or alter the Service Request process. This is a common and standard process for standing offer arrangements. The intent of the RFSO is to establish a standing offer arrangement with a qualified pool of Suppliers capable of delivering any one or both of Non-Executive Recruitment Services and Executive Search Services, as identified in Schedule “A” (Statement of Work), that will meet CDIC’s requirements, on an as and when required basis.

For clarity, CDIC will issue a Service Request to one or more Standing Offer Holders describing the requirements of a specific engagement. The intent of the RFSO is not to simply “retain” a single search or recruitment firm.

**Q10. In table C, it states “Fixed Percentage” but there is a \$ sign in the table – please confirm that this is to be a % and not a flat fee \$ rate?**

A10. Yes, CDIC confirms that for Table C: Fixed Percentage (%) Rate (of the total annual salary per search within the applicable position/role) in Appendix “D-2” (Financial Offer for Service Stream #2), Suppliers are to provide a percentage (%) value in the cell directly under “Fixed Percentage (%) Rate”.

Please see Addendum # 1 posted on January 8, 2021, which includes the amended Appendix “D-2” (Financial Offer for Service Stream #2).

**Q11. Section 6. Location of Work, Equipment and Information – could the CDIC please expand on the type of work that would be expected at a CDIC location? We would typically not perform any of our standard search process duties onsite at a customer location with exception of candidate interviews.**

A11. For the purposes of this RFSO, the location of work specifically refers to the location where the actual services are required to be performed by the Standing Offer Holder’s proposed candidates/resources.

For greater clarity, the location of work does not include the Standing Offer Holder’s services relating to performing the recruitment and/or search activities as outlined in Schedule “A” (Statement of Work) of the RFSO. Such activities or services are expected to be performed at the Standing Offer Holder’s premises, unless specifically specified by CDIC.

The location of work for the proposed candidates/resources will be identified by CDIC at the time of Service Request. The determination as to whether the work must be

performed on-site or off-site by a proposed candidate/resource will be at CDIC's sole discretion.

**Q12. While Proponent broadly agrees to CDIC's Form of Professional Services Agreement, there are points Proponent would need to clarify or revise and discuss should we proceed to the contracting phase. Will CDIC be open to such discussion at the contracting phase or would CDIC prefer Proponent submit a redline or exception sheet with its Proposal?**

A12. Changes to the Professional Services Agreement will not be considered at this time. As per Section 14, Resulting Agreements, CDIC intends to award agreements based on Schedule "F" (Form of Professional Services Agreement) to successful Suppliers. As such, any requests for changes to the Professional Services Agreement will only be considered from successful Suppliers.

**Q13. With respect to Articles 6 and 8 of the PSA, Proponent requests that CDIC clarify applicability in the context of Executive Search (where the candidate(s) are not employees of Proponent). Will CDIC consider review and revision of these Articles accordingly?**

A13. Please see answer to question 12, above.

**Q14. With respect to Article 7 of the PSA, it is not customary for Proponent to develop deliverables that extend to intellectual property ownership for its clients. As a result, it would be premature for Proponent to contract away such rights. Will CDIC consider review and revision of this Article to confirm that it is not applicable (or of limited applicability) in the context of Search services?**

A14. Please see answer to question 12, above.

**Q15. With respect to Article 10 of the PSA, will CDIC consider addition of a Limitation of Liability provision, if such provision is in accordance with a current contract between Proponent and CDIC.**

A15. Please see answer to question 12, above.

**Q16. Please clarify the expected guarantee period for the non-executive placements (service category 2).**

A16. Please see answer to question 8, above.

**Q17. Will the ceiling prices for temporary placements in Appendix D-1 be open to any re-negotiations based on changes to the applicable payroll burdens through the life of the standing offer?**

A17. As per Appendix "D-1" (Financial Offer for Service Stream #1), Suppliers should provide all-inclusive ceiling hourly rates for all levels they are qualified to offer for Service Category #1 (Non-Executive Interim Placement) within each of the listed Functions for Service Stream #1 (Non-Executive Recruitment Services).

For clarity, the all-inclusive ceiling hourly rates, all-inclusive flat ceiling fee rates and fixed percentage (%) rates, as applicable, submitted by Suppliers in both Appendix "D-1" (Financial Offer for Service Stream #1) and/or Appendix "D-2" (Financial Offer for Service Stream #2) are expected to be applicable for the initial 3-year term. As such, it is the Suppliers' responsibility to ensure that all applicable rates account for any future adjustments (i.e., inflation).

**Q18. Can the CDIC provide any historical use statistics or forecasted volume for the life of the standing offer.**

A18. The Standing Offer established under this RFSO is a completely new procurement process/vehicle. As such, there are currently no previous or historical information on the value per Service Stream or Service Category.

As per Section 16, No Guarantee of Volume of Work or Exclusivity of Contract, of the RFSO, CDIC makes no guarantee of the value or volume of work, if any, Standing Offer Holders may receive through the Standing Offer. The value and volume of Services, acquired by CDIC, if any, will depend on a variety of factors, including annual budgetary approvals.

**Q19. Can the CDIC confirm if any other geographies or remote workers / positions are likely to be in scope.**

A19. Please see answer to question 11, above.

**Q20. I have come across this RFSO and I am curious to know if it falls under a supplier arrangement, i.e., ProServices, THS, etc.?**

A20. The “ProServices” and “THS” arrangements referenced above are not related to the RFSO. The intent of the RFSO is to establish a new CDIC-specific multi-year Standing Offer vehicle with experienced and qualified firms, capable of delivering the Services of qualified resources, as described in the RFSO. This Standing Offer will allow CDIC to request Services on an as and when required basis through a Service Request to the qualified firms (Standing Offer Holders).

**Q21. With regards to Service Stream #1 (Non-Executive Recruitment Services), Service Category #2 (Non-Executive Permanent Placement), the instructions listed in Appendix C-2 (Reference Engagement Form) state:**

**8. The Supplier must not indicate “on-going” or other similar wording to describe a Reference Engagement that has not yet been completed as the Reference Engagement End Date in the Reference Engagement Form. A firm completion date (i.e., the day, month and year) must be shown for the Reference Engagement that has been completed. Any Reference Engagement Form with an “on-going” completion date will not be considered for evaluation.**

**For clarity, a Reference Engagement that is still on-going as at the Proposal Submission Deadline is not considered by CDIC to be eligible to be profiled and will not be considered for evaluation.**

**Permanent placements don’t typically have an end date assigned.**

- a) Please confirm it is acceptable for Bidders to insert “N/A” under “Engagement End Date” for SS#1, SC#2; and
- b) Or if this is not acceptable, please clarify what Engagement End Date Bidders are to demonstrate for Non-Executive Permanent Placements provided.

A21. Please see answer to question 1, above.

**Q22.** With regards to Service Stream #1 (Non-Executive Recruitment Services), Service Category #2 (Non-Executive Permanent Placement), the instructions listed in Appendix "C-2" (Reference Engagement Form) state:

**10.** For Service Stream #1, total level of effort for a given Service Category within a Reference Engagement Form must be a minimum of 20 working days (7 hours equals 1 working day) level of effort.

For clarity, this requirement to provide the total level of effort, does not apply to Reference Engagement Forms for a Service Category under Service Stream #2.

Permanent placements don't typically have an established Level of Effort assigned.

- a) Please confirm it is acceptable for Bidders to insert "N/A" under "Total Level of Effort (Days)" for SS#1, SC#2; and
- b) Or if this is not acceptable, please clarify what Total Level of Effort (Days) Bidders are to demonstrate for Non-Executive Permanent Placements provided.

**A22.** Please see the amendment made to Section 10 of Appendix "C-2" (Reference Engagement Form Requirements / Instructions) of the RFSO in Addendum #1 dated January 8, 2021.

**Q23.** With regards to Service Stream #2 (Executive Search Services), Service Category #2 (Executive Permanent Placement), the instructions listed in Appendix "C-2" (Reference Engagement Form) state:

**8.** The Supplier must not indicate "on-going" or other similar wording to describe a Reference Engagement that has not yet been completed as the Reference Engagement End Date in the Reference Engagement Form. A firm completion date (i.e., the day, month and year) must be shown for the Reference Engagement that has been completed. Any Reference Engagement Form with an "on-going" completion date will not be considered for evaluation

For clarity, a Reference Engagement that is still on-going as at the Proposal Submission Deadline is not considered by CDIC to be eligible to be profiled and will not be considered for evaluation.

Permanent placements don't typically have an end date assigned.

- a) Please confirm it is acceptable for Bidders to insert "N/A" under "Engagement End Date" for SS#2, SC#2, and
- b) Or if this is not acceptable, please clarify what Engagement End Date Bidders are to demonstrate for Executive Permanent Placements provided.

**A23.** Please see answer to question 1, above.

**Q24.** With regards to Service Stream #2 (Executive Search Services), Service Category #1 (Executive Interim Placement) & Service Category #2 (Non-Executive Permanent Placement), the instructions listed in Appendix "C-2" (Reference Engagement Form) state:

10. For Service Stream #1, total level of effort for a given Service Category within a Reference Engagement Form must be a minimum of 20 working days (7 hours equals 1 working day) level of effort.

For clarity, this requirement to provide the total level of effort, does not apply to Reference Engagement Forms for a Service Category under Service Stream #2.

- a) Please confirm that Bidders are not required to provide a total Level of Effort and may insert "N/A" under "Total Level of Effort (Days)" for SS#2, SC#1.
- b) Please confirm that Bidders are not required to provide a total Level of Effort and may insert "N/A" under "Total Level of Effort (Days)" for SS#2, SC#2.

A24. Please see answer to question 22, above.

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**NOTE:** Suppliers are advised that this is final addendum.

**[END OF ADDENDUM #2]**