

**PROSERVICES**  
**QUESTIONS AND ANSWERS**  
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## A. Grandfathering of TBIPS/TSPS suppliers

1. When will a decision be made about grandfathering? Also, question re grandfathering vendors who currently have TBIPS. Main firm has a TBIPS SA and also has a Joint Venture (JV) TBIPS SA, - the main firm has fewer categories and the JV has more categories: If we are grandfathered would we get all categories that are within both our TBIPS? How do suppliers validate that the supplier should be grandfathered?

*The decision has been made to grandfather TSPS and TBIPS suppliers. As both will be grandfathered into ProServices, the categories they are each qualified in will be migrated to ProServices, under each supplier. The Supplier must be an active TSPS or TBIPS Supplier to be grandfathered..*

## B. Grandfathering of PSOnline suppliers to ProServices

1. Will existing PSO suppliers be considered to be grandfathered? Concern is that evaluation will be difficult for ProServices and grandfathering of existing PSO Suppliers should be considered.

Three design criteria offered, based on PSOnline being viewed as a useful tool, though it has been orphaned/deserted.

- Small & Medium Business Friendly: like the direction we are taking, but would like to see OSME more involved.
- Easy to qualify & access: grandfathering existing PSO Suppliers who have gone through a fair bit of work.
- Simple to respond to opportunities: stop full blown RFPs by Clients which require costly proposals. Create a template response for Suppliers.

*PS Online suppliers will not be grandfathered, as the major change in ProServices is that resources will not be evaluated; evaluation will be at the company level. PSO used the honour principle. With ProServices, there will be a validation process. It will not be more difficult. The goal with this process is to ensure that when a Client conducts a search, the results of that search will be companies who possess the experience for the category.*

2. What happens to PSO contracts that go beyond 2013? Once PSOnline disappears, will TBIPS and TSPS be eliminated as well?

*PWGSC confirmed that all contracts will remain valid, i.e. contracts continue as normal, for example a contract issued just before launch of ProServices is not a problem. PSO will be sunset and no longer available for use, once ProServices is launched. Amendments to PSO contracts can continue to the maximum NAFTA threshold of \$78.5K. PSOnline will disappear once ProServices is up and running. However, TBIPS and TSPS will remain as methods of supply and if a requirement is over the NAFTA threshold, a client will still use these main methods. If the requirement is below NAFTA threshold of \$78,500 then a client will use ProServices, which will have those same categories from TBIPS and TSPS.*

## C. Criteria – Years in Business:

1. The 1 year threshold is critical - in fact you might consider extending it to two years, as this will ensure that consultants have a based on knowledge and expertise before being on ProServices. It will end up being an inclusion criteria. Also recommend \$100K business volume and up to 3 projects. If 1 year in business is stated, this could eliminate companies. 3 years of experience is not the same as stating: 36 months of billable time. The latter is what is recommended.

*As a result of the consultations, it has been determined that the supplier must have been in business for 1 year, and the number of projects is 1 to a maximum of 4, with a total dollar value of \$20,000 or 20 days level of effort, within the past five (5) years.*

## D. Criteria – Project Dollar Value

1. The nature of the various services that various services providers supply is just too diverse to apply a dollar value limit as a qualifying criteria, some contracts are under \$10,000. there are multiple projects of a couple of days. These would be combined to respond to a total effort, but again, the projects are individual. Suggest Project values: 1 project per consultant category of a minimum value of \$20,000, or 5 projects "per class" (independently of categories). Suggest that \$100K business volume may be a mistake. Another supplier suggested that \$50K threshold for business volume is sufficient. Also concerned expressed with the number of projects because all of the categories that the company is capable of covering, are not reflected in the projects that the company has handled. Concerned with 3 years for projects; should be 5. It was mentioned by a supplier that the number of years of experience within a specific time frame, example 3 years in the past 5 years experience in a specific department is not only unfair but not necessary given the climate and number of requirements over the past year which may also get worse. Can this type of criteria be removed as clearly the Crown is eliminating resources unnecessarily? Should also include all sectors of experience, i.e. all levels of government and major industry/crown.

*As a result of the consultations, it has been determined that the supplier must have been in business for 1 year, and the number of projects is 1 to a maximum of 4, with a total dollar value of \$20,000 or 20 days level of effort for each category, within the past five years. Experience not restricted to government experience; experience includes private and public sector.*

2. Need to segment groups; large companies can only handle certain threshold of requirements and SMEs others.

*It was explained how this was not possible and that we cannot discriminate against large companies.*

3. Concern was expressed with the size of projects; for this company, there are multiple projects of a couple of days. These would be combined to respond to a total effort, but again, the projects are individual. For one-person shops who have to qualify, you must make it easy for them – they most certainly should not have to go through what we did for TBIPS. It would be prohibitive for them.

*During the consultative process, PWGSC acknowledged that this was acceptable. However, this is under review to determine how to implement.*

## **E. Evaluation Criteria**

1. Should not need to demonstrate any experience. PSO is to help Small and Medium Enterprises (SMEs). It is a mistake to go away from resources; benefit for departments is being able to get the people they know. The quality of past work would be a useful addition to the file. There are too many companies who fail to deliver currently but seem to be bidding again on similar projects. This should be transparent information, since it may also affect subcontractor selection. If a firm has a designation of poor performance, then some appeal process will be necessary. Other contractors should also be able to question high rankings for other firms, with some justification provided. After review, ProServices can determine if an adjustment is needed. There also needs to be some suggestions for remedial action of the firm to increase its rating.

*A project identified as a subcontractor can be used by the Supplier and also be used as part of a Joint Venture. A supplier will have to provide their experience to become qualified in that category, by demonstrating 1 to a maximum of 4 projects for each category, and the projects can be over the past five years. There are no rankings in ProServices.*

2. If one major project encompasses more than one job category, can we submit the same project for multiple job categories in the Technical proposal for the RFSA? My comment deals with the enrolment process and criteria. In short, I would advise you not to rely solely upon very recent experience. Often, I have seen RFPs for SOAs restrict the inclusion of projects to ones that have been undertaken in, say, the last year or two.

*Yes, the same project can qualify for many categories if it demonstrates the required experience, and dollar value or level of effort, in each category.*

3. Before grids are completed, Suppliers needs to see what is needed to be validated.

*It was explained that the information needed for ProServices is the number of projects. The information needed by a Client will be part of the RFP issued by the Client.*

4. If you were a sub-contractor for a company that was on TSPS/TBIPS can this count as experience/projects to submit in technical proposal for the RFSA?

*A project identified as a subcontractor can be used by the Company.*

5. Can projects under PSO can be used as part of grandfathering.

*As the current 66 categories are being replaced with 132 current categories, the information provided to 'register' in PSO cannot be used for ProServices.*

6. The criteria for evaluating applications under ProServices is also a concern. As a long-time certified practitioner in group facilitation will the screening criteria will recognize such things as years of service in the profession, past experience doing business with the federal government, and status within the profession, not simply size of firm. Setting a specific volume of business during the past year (suggested at \$100K by one meeting participant on September 18) is not realistic since this has been a 'light' year for government work all around given all the cutbacks. I anticipate my own income from government this year will not amount to \$100K. Should that prohibit me from being on the supplier list? It was disappointing to learn that current PS Online registrants will not be grandfathered. What does "level of effort" mean in relation to a supplier having to demonstrate a certain level of effort?

*The supplier will have to provide 1 to 4 projects with a total value of \$20,000 or 20 days Level of effort, for each category, completed over the past five years.*

7. What if my company is now offering a service that we didn't register for in our initial registration of ProServices? Do we still need to have projects that show our competency in that field before being listed as a supplier for that service?

*As ProServices will be a perpetual refresh with quarterly evaluations, a supplier can submit a new proposal with the requested evaluation criteria in the refresh to demonstrate their competency in a new field(s).*

8. How will validation be done? Will specific references have to be provided in the proposal? Will we be notified if a reference cannot be reached?

*PWGSC will evaluate the individual projects, which will then be validated by a reference check. Yes, a reference will be requested for each project which will be validated by the contracting authority. It is up to the supplier to ensure that the reference is a valid reference, entered into the Data Collection Component. A back-up reference could be added as well.*

9. Will information from PS-Online, TSPS, and TBIPS be transferred to ProServices?

*No information will be transferred from PSOnline. As TSPS and TBIPS pre-qualified suppliers will be "grandfathered", the Suppliers will have to go into the Data Collection Component when released and add the requested information. Existing TSPS and TBIPS who wish to qualify for additional categories would then have to submit a technical bid during the solicitation stage.*

## **F. Corporate Experience**

1. Scenario 1 - my company has employees, that worked on projects. Can my company claim corporate experience against one of the 132 categories to be included in ProServices.

*Yes, 1 to a maximum 4 projects, with a total value of \$20,000 or 20 days level of effort for each category.*

2. Scenario 2 - my company, a small consulting firm has or has had several consultants under contract on specific projects. May I claim all of the projects these consultants worked on as sub-contractors for me.?

*These projects could be claimed against a specific category, within the specific 1 to a maximum of 4 projects, with a total value of \$20,000 or 20 days level of effort.*

3. Scenario 3 - my company, a small consulting firm has or has had several consultants under contract on specific projects. These consultants also worked on other projects but not as subcontractors for me. May I claim these projects as part of my corporate experience?

*These "other" projects can not be claimed against your corporate experience to qualify for ProServices, as they were not sub-contractors for you..*

4. Scenario 4 - same as Scenario 3, but rather than contractors, they are employees of my company.

*If employees for you, the project experience can be claimed.*

5. Scenario 5 - my company buys out a smaller company. Can I now use the bought out company experience as part of my company's capabilities for ProServices?

*Yes it can be used as your company's experience, providing that you demonstrate 1 to a max. of 4 projects, value of \$20,000 or level of effort of 20 days, for each category you are responding to.*

6. What are the corporate qualifications for ProServices?

*Corporate qualifications include 1 year in business, and Designated Organization Screening (DOS) security clearance, There are additional qualifications that are included in the Certifications in the Data Collection Component..*

7. Will both the primary and secondary company on a JV be required to meet the corporate qualifications for ProServices? Or will it be possible to combine the corporate qualifications of both the primary and secondary company on the JV to meet the corporate qualifications?

*One member of the JV company must meet the 1 year in business, does not need to be the prime. The other technical evaluation criteria can be met using a combination of experience of the JV members.*

## **G. Rates**

1. Ceiling Rates - One of the comments at the consultation indicated that Ceiling Rates will form part of the new ProServices model. Does this mean that suppliers will only have opportunity to submit prices (ceiling prices) once per year or will prices be adjustable as they are in PS Online currently?

*There will be no ceiling rates provided for the ProServices supply arrangement. Rates only apply during Stage 2, when an RFP is sent to suppliers and a financial bid will be requested..*

2. We are wondering about the proposed process to invite bidders "based on lowest rate" which of course would be impacted by PWGSC's response to 1. above. From what I understand, ProServices appears that it will be a "two step" process to qualify / win work, (Step 1: Qualify for ProServices as a corporation and submit rates; and Step 2: Respond to individual call-ups and submit potentially different rates). Is this understanding correct? This is important because of how ProServices categories will be priced. As an example, a Business Analyst (BA) may be priced at \$xx per day so that the listing company will be selected based on ProServices "lowest price" criteria. However, when a Statement of Work / RFP is issued and the request includes criteria such as: "looking for a BA with SAP or Peoplesoft experience", we know that the "lowest rate" approach used to prepare the invited list of companies will virtually eliminate the lowest bidder from any possibility of bidding because SAP and Peoplesoft resources are much more costly than a BA generalist listed at \$xx per day. Therefore, we would like to know if a ProServices qualified vendor will be able to submit a higher rate during Step 2 than proposed during Step 1 as described above?

*ProServices is a two stage process, stage 1 is to qualify for the supply arrangement. No ceiling rates are to be submitted in stage 1. Stage 2 will be the RFP stage by client departments and that is where a financial bid will be submitted in response to the RFP.*

3. One of my services is coaching and this is billed by the hour, not the day. When I have had to calculate a per diem for this in the past for PSOnline, it has put me at the top end of the rates. My per diem for facilitation work is less than this hourly rate for coaching.

*There will be no ceiling rates in ProServices. Suppliers will be required to submit a financial bid at the RFP stage. Typically Canada asks for a per diem rate based on 7.5 hours, which can be pro-rated based on the number of hours worked.*

4. What happens to the rates that a firm quoted in a SO? We mean will these be used eventually for a ProServices bidding process? Can new rates be proposed?

*The SOs remain intact. There is no connection between the rates in the SO and the ProServices supply arrangement. Therefore under resulting RFP's, you are not bound by an SO rate.*

5. Will sole sourcing be allowed?

*In accordance with the Government Contract Regulations, PWGSC will permit contracts to be directed up to \$25,000, provided the client can demonstrate that it is not cost effective to run a competitive process.*

## **H. Certifications**

1. Many of the current tests of competence in the PSOnline are often arbitrary and wrong-headed, and, if they had been enforced, they would have eliminated some of the most able providers in their fields. (For example, to qualify as a Human Resources Policy Specialist or a Human Resources Consultant, which I surely am after 35 years in the domain, I am expected to have a certificate from a professional development association in personnel administration and/or a college diploma in business administration, commerce, industrial relations, psychology or public administration. I have neither, and I need neither to do the work I do. Similarly, I have a colleague who has taught and facilitated groups of public service and private sector executives for years at CCMD and in Queen's MPA program who would theoretically be barred from facilitating because he does not have a certificate in group facilitation from a professional development association.) It is fine to capture information on certifications and education, but these should not be barriers. Only the buying manager can decide what he or she needs and assess the qualifications of those who offer to meet those needs.

As mentioned above and as seen in the list of mandatory certifications or qualifications currently in the "Skill/Group/Skills" section of the PSOnline, for several skill categories, a small range of college diplomas and university degrees is currently recognized. The arbitrary selection of these cannot be justified – some of the best HR consultants, and advisors on business transformation and organizational design, hold degrees in other fields such as English, Classics, Botany and Kinesiology – qualifications that would not allow them to practice under the current regime, if enforced. I don't know how many of these or similar requirements, if any, are part of the qualification

process for access to TSPS or TBIPS, but there should not be mandatory in ProServices and all of the ones below should NOT be carried over into ProServices. Since ProServices will be the sole means of access to government contracts, this is a matter of business life or death for many small firms.

*The categories from TSPS and TBIPS will be migrated to ProServices and are clearly defined in the Statement of Requirement.. TBIPS does not have any certifications in its qualification criteria.*

2. The TSPS categories list is much better than PSONline, but it could be improved. Important lines of service are not recognized in TSPS today, such as the provision of advice on policy design and implementation, business strategy design and clarification, governance systems and so-on. Some of the category descriptions could be further improved for ease of business.

*PSONline categories will disappear. In TSPS, there are a lot of categories related to business services. Category descriptions are improved at every renewal.*

3. Certification requirements for categories need to state equivalents.

*TBIPS does not have any certifications in its qualification criteria. In TSPS there is a Flexible Grid and. they do not state equivalencies, except for the general clause of education.*

## **I. Joint Venture questions:**

1. Need clarification on what happens when in association with another company, i.e. how is project experience handled. Will both the primary and secondary company on a JV be required to meet the corporate qualifications for ProServices? Or will it be possible to combine the corporate qualifications of both the primary and secondary company on the JV to meet the corporate qualifications?

*A project identified as a subcontractor can be used by the Supplier and also be used as part of a Joint Venture. One of the JV members must meet the 1 year requirement. One of primary & secondary companies on a JV must meet the corporate qualifications with respect to number of projects, 1 to a max. of 4, value of \$20,000 or 20 days level of effort, for each category proposed, within their JV..*

2. Concern was expressed from changing from resources to company; how will ProServices handle this; do companies need to form consortium?

*Suppliers may wish to form Joint Venture's in order to qualify, and enhance their capacity and/or number of qualified categories.*

3. Request made that there be no limitations imposed that would prevent a vendor from being qualified for ProServices in two manners: one as a member of a TBIPS-qualified Joint Venture (via a grandfathering arrangement) and the other as a standalone corporation not involved in a Joint Venture.

*All Suppliers, including joint venture suppliers, on TBIPS will be grandfathered into ProServices.*

4. What is the definition of "joint ventures". We have recently formed a joint venture in order to be able to tackle larger projects. Our intention is for the joint venture not to be an incorporated business. Each of our individual businesses are of course incorporated. As individual members of the joint venture, we are all well established businesses with decades of experience. Some questions are:

- a. How long will a joint venture have to be established to be allowed into your system?
- b. Will it have to be separately incorporated?
- c. Will the collective revenues of the joint venture be used to establish whether we can be in your system?

We have no problem of the traditional practice of one of the members of the joint venture having to sign the formal contracts with the government for a specific RFP.

*Joint Ventures:*

- a. 1 of the firms must be in business for 1 year
- b. See definition of Joint Venture below.
- c. There is no financial data required for the ProServices supply arrangement.

*Definition of Joint Venture*

1. A joint venture is an association of two or more parties who combine their money, property, knowledge, expertise or other resources in a single joint business enterprise, sometimes referred as a consortium, to bid

together on a requirement. Bidders who bid as a joint venture must indicate clearly that it is a joint venture and provide the following information:

- (a) the name of each member of the joint venture;
  - (b) the Procurement Business Number (PBN) of each member of the joint venture and the PBN of the joint venture itself;
  - (c) the name of the representative of the joint venture, i.e. the member chosen by the other members to act on their behalf, if applicable;
  - (d) the name of the joint venture, if applicable.
2. If the information is not clearly provided in the bid, the Bidder must provide the information on request from the Contracting Authority.
3. The bid and any resulting instrument must be signed by all the members of the joint venture unless one member has been appointed to act on behalf of all members of the joint venture. The Offer/Arrangement Authority may, at any time, require each member of the joint venture to confirm that the representative has been appointed with full authority to act as its representative for the purposes of the bid solicitation and any resulting instrument. If an instrument is awarded to a joint venture, all members of the joint venture will be jointly and severally or solidarily liable for its performance.

## J Security Issues

1. PWGSC stated they would willing to upgrade suppliers one level up We currently have a Secret Facility Clearance which includes Secret Documentation Safeguarding at the Secret level. Would you sponsor one level higher to Top Secret? Who needs DOS and when? Should not have to have security; if Client does not allow you to remove classified material, your company premises should not need to be security cleared.

*Yes, PWGSC will sponsor a firm up one level. You must request this in an email to PWGSC (Peggy Gilmour A "Designated Organizational Security" is required prior to the issuance of a supply arrangement. This is part of the PS National Procurement Strategy that each Supplier must have as a minimum 'Designated Organizational Security' (DOS).*

2. I currently have a Secret security clearance that expires in 2015. It is held by another entity. My husband has Top Secret security clearances. These are held by a couple of companies he has worked for or through. He provides IT services. In speaking with CISD, the implementation of ProServices with the requirement of a DOS will mean that we no longer will qualify for most of the work in our fields that will be posted on ProServices. If an organization has secret level for individuals but not DOS for firm do they need one?

*A firm must have the required Security Clearance. As stated above, PWGSC will sponsor Suppliers one level at a time. Suppliers will only be able to provide services to the lowest level of security of the Supplier, or of its JV members. However, you can still subcontract with other firms, and apply at a later date for an upgrade in sponsorship. Yes, the firm needs DOS.*

3. Can PWGSC hold our company security clearances?

*No, you must get personal security clearances transferred to your company when your firm has its security clearance (i.e. DOS).*

4. Hopefully there will be some kind of standardization, as well, for the security requirements.

*It is the client departments' responsibility to identify the applicable Security requirements, and in order to help the clients and suppliers, PWGSC has created a set of common SRCLS that may be used by any of the PWGSC Professional Services Methods of Supply including ProServices:  
<http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/31-eng.html>*

5. How does ProServices work in relation to Security requirements, particularly in relation to the roll up of CPSA into TBIPS? What specific Security Categories will be included? Will these categories be included right from the onset (Spring 2013) or only when CPSA is rolled up into TBIPS (Summer 2013)?

*ProServices will have a DOS, however when a client does an RFP there will be generic SRCLS that they can use for their requirement. A supplier will have to comply with the applicable SRCL(s) at the time of the RFP. TBIPS will publish through GETS (Merx) their revised list of streams and categories for the next refresh in November 2012 and all vendors interested will have an opportunity to review it.*

6. Need Clients to understand how security works, i.e. Client does not need to redo the work which has been completed by PWGSC.

*As ProServices is a PWGSC tool, client departments who sign a Master Level User Agreement, agree to abide by our terms and conditions, including security. However, some client departments have additional security requirements that must be met.*

7. If the requirement asks for secret clearance can we still apply to RFP.

*Each individual requirement will advise on individual security at time of the RFP. A supplier will be required to have what is requested in an RFP in order to submit a bid, or apply for a sponsor upgrade. The individual RFP will identify whether or not the security requirement is required to be met at time of bid closing or prior to contract award.*

8. If I am a single sole owner and I am individually cleared do I need a firm Designated Organization Screening (DOS)? Also if the company is not incorporated and the individual is cleared, is there a need for a separate DOS for the company? Who will be responsible to sponsor individual's security clearances

*Yes, the firm itself must have a DOS. This is the responsibility of the company.*

## **K. Use of ProServices – RFP process**

1. Should a supplier not be on specific categories on TSPS/PASS or TBIPS although we have resources in all fields will we be eligible to provide resources under ProServices?

*The qualified categories on TBIPS and TSPS(task) will be grandfathered to ProServices. If you have additional categories you wish to qualify in, you would be required to submit a proposal and data collection component to become qualified for the additional categories during the Request for Supply Arrangement solicitation stage.*

2. It was mentioned that the entire response process is too lengthy and complicated for no reason. We agree that it is more time consuming to respond to requests. If you want to keep it simple, then ensure that it is a simple process that will not have to be 30 pages long.

*As per the PS National Procurement Strategy, there are standard templates for the Methods of Supply, which should minimize response time.*

3. It was mentioned by a supplier that the security and/or evaluation process is too long. It was my understanding that PWGSC will recommend on a 15 day response date and 15 day turn around as well. Was I understanding correctly?

*PWGSC encourages clients to evaluate bids on a timely basis; however, PWGSC cannot mandate the clients must evaluate bids within a certain timeframe.*

4. As a follow-up to the suppliers' meeting, I gave a copy of the document to the Senior Director. The document is an example of how ProServices could be structured; it is the best structured SA that I have seen in all my years of working with RFSAs and RFSO's. This excerpt is from a solicitation document produced by Public Service Commission about three years ago. If ProServices could be structured like this it would go a long way to eliminate the challenges of small independents versus larger firms.

*PWGSC received your document. However, as part the Professional Services National Procurement Strategy, PWGSC has harmonized templates which will be incorporated into all our Professional Services methods of supply.*

5. It became clear that the online services to date have had many participants but few resulting contracts, mainly because departments are not using the system. You indicated that the new system would be mandatory, but later said that departments could continue with their existing systems. As well, some specialized databases would remain outside of ProServices. For this program to be effective you must find ways to encourage all departments doing professional procurement to do so through ProServices.
  - a. One test will be if HRSDC, Finance, TB, and the Bank of Canada (and other Crown corporations) use the system exclusively.
  - b. There will need to be features in the system that are of value to the contracting departments. The ability to do searches on past projects might be helpful. The track record of potential suppliers, perhaps summarized in a letter grade, would be useful.
  - c. If MERX is used to solicit proposals for professional services then all respondents to an RFP should be registered with ProServices. This would encourage all departments to use MERX and ProServices.

- d. The reason (or justification) for having department lists is that the timing is too long by going through MERX and PWGSC. My experience shows little difference, since the time after delivering a proposal before a decision is as long or longer with department lists as with MERX.
- e. Obviously, anything that can be done to improve service times for both clients and contractors will help enhance the reputation of ProServices.

Answers:

- a. *Currently PSOnline has over \$20 million a year in contracts. We are encouraging all departments to use ProServices, through consultations and online training.. It will become mandatory for requirements below the NAFTA threshold*
  - a. *The criteria in ProServices is based on the Professional Services National Procurement Strategy and will be harmonized with other methods of supply.*
  - b. *ProServices is below the NAFTA threshold so the requirements do not need to be posted on Merx. Suppliers will be pre-qualified and RFPS will be sent to the suppliers selected within a search on the CPSS system.*
  - c. *With the new harmonized business rules, a ProServices requirement only has to go to 2 suppliers and the client can determine the number of days posted.*
  - d. *See answer to d. above.*
6. One objective should be to foster a sense of real competition, not the current practices of departments writing RFPs to select a specific company. But they should realize that they may be precluded by similar arrangements with other clients.

*It is a requirement that all Government Contracting be conducted in an 'open, fair, and transparent manner'. Client departments should not be creating evaluation criteria in order to prevent competition. In accordance with the Professional Services National Procurement Strategy, under the NAFTA threshold, client departments are to select the minimum number of suppliers in accordance with the General Contracting Regulations (currently a minimum of 2 suppliers).*

7. To encourage the use of ProServices by departments and suppliers, the rule should be that contractors listed in ProServices must not do business with other lists. Government departments with their own processes should be prohibited from contracting with people on the ProServices list. In other words, ProServices becomes an exclusive source, with departments and contractors working through that framework for all professional services. This need not preclude a department from using a Temporary Help Services list (or other specialized lists), but only people not on the ProServices list could be hired. Departments need to understand how to use it.

*This is not possible to do, we cannot discriminate against companies. ProServices is for requirements below the NAFTA threshold. We are doing consultations and there will be on-line training for clients to encourage use of ProServices.*

8. We are quite a small business. I hope that the technical proposal will not be too onerous: 3 - 5 days of effort would be a high amount for us. I also hope that the qualifying criteria will acknowledge small businesses like ours and not exclude us. My business is dependent on small (mostly under 15K) government contracts - it's a real time consuming process (and costly) for "independents" like myself to respond to a lengthy RFPs. Is this what ProServices will require?

*PWGSC is committed to making the bidding process to qualify for ProServices as simple as possible. As a result, Suppliers will use a new online Data Collection tool that will simplify the majority of the bidding process for ProServices and other Methods of Supply, Pre-qualified suppliers will have to respond to the individual RFPs. There will be a standard RFP template to be used by client departments for ProServices..*

9. Our company has been in business since 2005 and has been providing project management and software development resources directly and indirectly to federal depts, crown corps and healthcare organizations. When the last round of TBIPS came along there were financial requirements that excluded our company from eligibility. I believe in some services categories we needed to have \$2M in contract history. As such, we were pretty much relegated to PS Online which was used rarely by departments. I would like to know if the new ProServices procurement model will be more attractive and useful for departments from a procurement perspective and if a company of our size (continues to grow) will be relevant and accessible given the size of some of the existing suppliers in the National Capital?

Currently PSONline has issued contracts totaling over \$20 million per year. PWGSC is committed to ensuring that process for getting business valued under NAFTA does not use the same thresholds for requirements over \$2 million, both within the NCR and across Canada.

10. Will ProServices be run like TBIPS? i.e. my clients will still have to go to all the pre-approved suppliers with an RFP? If so, companies like me will be at an unfair advantage because I will need to compete with the large body shops who have full-time proposal writers.

*ProServices is for requirements below the NAFTA threshold. In accordance with the Professional Services National Procurement Strategy, clients will have to invite at least the minimum number of suppliers in accordance with the Government Contracting Regulations (GCR) (currently 2). Suppliers are encouraged to market themselves to clients in order to enhance the probability of being invited.*

11. If you really want to make contracting more efficient and save tax dollars, you'd find ways for my government clients to do small one-off contracts with professional consultants like myself - and teach departmental contracting officers that it's ok to save money by allowing small sole source contracts to trusted and knowledgeable experts.

*ProServices is for requirements below the NAFTA threshold. A client may choose a minimum of 2 suppliers to bid on the process. If the requirement is below \$25,000, a client may do a sole source based on the GCRs.*

12. Will the SO (Task-based) and SA (Task / Solution) only be applicable for work above the NAFTA limits and only ProServices will be used for work below NAFTA limits?

*TBIPS AND TSPS (task) categories will be grandfathered to ProServices for requirements below NAFTA. TBIPS (SO) AND TSPS (Solutions) and SO will be used for requirements above NAFTA.*

13. Concern is that evaluation will be difficult for ProServices and grandfathering of existing PSO Suppliers should be considered.

*Current PSONline suppliers will not be grandfathered to ProServices. As PSONline used the "honour" principle, ProServices, is implementing a validation process that will ensure that clients have access to suppliers who have the experience and capacity to handle their requirements.*

14. After being pre-qualified, Clients should not ask the Supplier to fill out another grid.

*Filling out the Data Collection Component is part of becoming qualified. Suppliers will be required to submit a bid in response to individual RFPs.*

15. Financial criteria: Clients need to understand how and when to apply these.

*There will be no requirement to submit rates under ProServices, and there will be no financial evaluation to become a pre-qualified supplier.*

16. Clients need to understand how and when to apply Selection methodology:

*PWGSC provides support to client departments when using the RFP templates.*

17. Under the National Procurement Strategy, is the minimum 2 suppliers?

*Yes the minimum required below NAFTA is 2, however, PWGSC does recommend 5.*

18. Will ProServices be mandatory? Do not see a level playing field with ProServices.

*ProServices will be the mandatory tool for requirements with a value estimated at below the NAFTA threshold. PWGSC explained that the ProServices supply arrangement will be mandatory for TBIPS and TSPS requirements below the NAFTA threshold.*

19. Short-turn around times for RFP, this can be an issue. Can there be a minimum of 4-5 days for the bidding period?

*Under the Professional Services National Procurement Strategy, clients are responsible for determining the bidding period, however it must be a minimum of at least 5 days.*

20. Worried that validation process will be too much, i.e. 2400 proposals. How will PSPD handle this?

*PWGSC will conscript a large portion of procurement officers to respond to these demands.*

21. The 'honour system' has been great; it helps departments to contract directly with the person the department knows and wants. Although this approach is wrong, it works. Though ProServices may stop this, there is worry for companies that they will not get contracts because their resource cannot be found.

*ProServices is implementing a validation process that will ensure that clients have access to suppliers who have the experience and capacity to handle their requirements. The suppliers will be qualified, not the resources.*

22. What is the underlying technology for ProServices?

*The design is based on TSPS.*

23. How is contracting to be done through PSO from now to when ProServices is launched?

*Contracting continues as per the normal method currently in place. A contract issued just before launch of ProServices is not a problem. PSO will be sunset and no longer available for use, once ProServices is integrated. Amendments to PSO contracts can continue to the maximum NAFTA threshold of \$78.5K.*

24. Can departments be made to use PSO or ProServices?

*PWGSC explained that departments cannot be forced, however, this is exactly why we are creating ProServices so as to make it clear as to what to use.*

25. Will refresh process eliminate a company who has not received a contract under ProServices? How often is the refresh?

*The Refresh process will not eliminate a company. Refreshes will be perpetual.*

26. Will the related Request for Supply Arrangement solicitation mentioned be emailed out, or will we need to check on Merx for its arrival. What will be the RFSA bid period?

*It will be posted on Merx, for a minimum of 40 days.*

27. Do PWGSC have validation templates so that companies can get started.

*This is premature at this time.*

28. Is there an aboriginal component for ProServices?

*Yes, there is.*

29. Although PSO served a purpose, Clients still want grids and this creates a lot of pressure. Would we consider a marked up resumé versus a formal grid?

*PWGSC acknowledged that simplifying the RFP is a goal. Builders will be provided to the Client and a suggestion of marked up resumé is possible.*

30. Will there be an appeal process for companies who do not qualify?

*PWGSC explained the process of debriefing (see below) and the perpetual refresh.*

*Debriefs:*

*After issuance of all of the Standing Offers and all Supply Arrangements resulting from the bid solicitation, and also after each subsequent Supply Arrangement quarterly calendar year evaluation for which a bidder has submitted a bid, a bidder will be notified in writing regarding the outcome of their bid evaluation. Bidders should make a request for any additional debriefing to the Offer/Arrangement Authority within 15 working days of receipt of such written notification. The debriefing will be in writing.*

31. What if I live in one region but offer services in several regions? Can I have several government contacts to reflect those regions? I saw in the presentation that PSOnline is seldom used regionally. How will this improve with ProServices? Need to add a filter to search in ProServices, to identify specialties, e.g. business analyst with SAP specialty

*Yes. This will be improved by having regional and metropolitan areas under harmonization, and is meant to promote "local office".*

32. What is there is only one supplier for a client's search?

*If there is only one supplier, then the client's approval for sole-source would be required.*

33. You will need full participation of the consulting community as well. This will be important to the departments and to the consultants. A department should check any consultant in the system. If he/she is not there then the department should have to justify its selection. Consultants should select sub-contractors from the system. If their team is not listed then again they should have to note this fact, explain it, and submit it as part of their proposal. This should lead to most sub-contractors registering.

*Clients can only search suppliers, not resources as they will not be listed. Sub-contractors would have to submit a technical proposal just like any other supplier. There will be no resources listed on ProServices, only categories within a supplier.*

34. A registered consultant should be able to search the file in the same way as a department. This would be useful in selecting contractors, determining the experience set of "competitors" as they appear on the MERX list, and seeing the ratings of all of the companies in the file, including their own. This transparency should help improve the quality of the file over time.

*There will be no resources listed on ProServices, only categories within a firm.*

35. The consultant should be able to see who bid on a RFP, who won it, and the relative ratings of the list. If they were not selected to bid on a small contract, then they should be able to determine why.

*A supplier is entitled to a debrief to determine why they were unsuccessful.*

36. One service of interest to consultants would be the ability to refer to the ProServices information base for company background and staff vitae, reducing the amount of "standard material" added to most RFPs. Similarly the client can see the same information. Such an approach puts a high premium on the contractor to maintain this information as current as possible.

*There will be no resources listed, and this would be proprietary information of the suppliers and will not be available to other suppliers..*

37. Another service of value to everyone, particularly small firms, would be the ability of the firm to indicate its current capacity to deliver on a contract. The contractor could indicate one of the following: Actively looking, on vacation until *date*, fully committed until *date*, and dormant. This status indicator could be changed by the contractor at any time. Initially everyone will say they are actively looking. But if there are firms that are over-committed then this allows them to stay in the system and not be rated poorly in non-response to RFPs..

*Not part of the e-portal Central Professional Services System, could be looked at for future release.*

38. I think PWGSC can make better use of technology to reduce processing efforts, decrease processing time and the cost to procure. The amount of manual processing and handling that occurs in the procurement process appears to be not only enormous, I ask the question is it required or value added. If I can apply on-line for job than why can I not do the same to bid on a RFP? Imagine, however if you had a solution where suppliers could enter in a PWGSC procurement number and all the company information populates an on-line screen. The company completes the mandatory and rated information on-line where there are some business rules in place to ensure the quality of the information. Finally the vendor is given some flexibility to allow companies to upload work plans, methodologies etc if required. Once the vendor completely reviews all the information than he or she submits the information on-line. The crown gets, high quality standardized information that should streamline the procurement process. In fact you could completely automate the ranking of the financial bids.

*We have slowly initiated this process. The CPSS is the first step of that building block. The supplier will have the capability to bid on refresh electronically as the next step. There is no financial requirements within ProServices. PWGSC is currently developing a Digital Procurement Strategy. PWGSC will be using an online Data Collection Tool that will reduce the amount of information that must be provided to PWGSC as part of the bid solicitation process for TSPS, TBIPS and ProServices.*

## **L. ProServices and Additional Categories**

1. It was asked at our session that suppliers would like to have input on additional categories in ProServices? How do we go about providing our recommendations? Will Suppliers have input on the expanded categories for ProServices?

For TSPS, send an email to the TSPS inbox, we will take note of the suggestions and we'll contact the suppliers if more information is needed. <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spcts-tspc-eng.html>  
From an IT perspective, the clients have always found a category to satisfy the requirement. But it is possible that new types of work become the subject of a large and popular demand and if, supported by a sound justification, a new category would be deemed necessary to carry a significant amount of services that are not at all covered by an existing category, it should be brought to the MOSA's attention for consideration.  
<http://www.tpsgc-pwgsc.gc.ca/app-acq/sptb-tbps/index-eng.html>

*if a category does not exist in ProServices, Departments do not use ProServices. With respect to keeping categories current, there is a willingness to have ongoing consultations. Changes to categories occur through the various methods of supply and then are fed into ProServices.*

2. A few years back in my role as a 'group facilitator' I was hired to facilitate a strategic plan. With PS Online to be discontinued, I am left wondering where any government department will look to find facilitator services under the proposed ProServices categories. Without 'group facilitator' as an identified category I fail to see how ProServices will make the procurement process more efficient for end-users across the federal government, not just PWGSC. I believe that replacement of PS Online with Pro Services with 132 categories based on TSPS that appear to specifically exclude 'Group facilitator' will prohibit me from doing business with the federal government when PSOnline is sunset

*At the moment, a facilitator category is not included in TSPS. However, PWGSC is looking at adding this category into TSPS. Changes to categories, which are client driven, occur through the various methods of supply and then are fed into ProServices. In TBIPS there is no facilitator category and a client department can still proceed to procure their requirement using a standard solicitation process..*

3. Upon reviewing the presentation, I am disappointed that even though the categories have been expanded, it still does not include the one that we fall into which is Event Registration. This is a continuing problem for us since we are always mystified as to what category we should put ourselves in by trying to guess what category the purchaser would use to look for us in. Is there a lobby mechanism available to have categories such as ours added?

*No Event Registration category exists, however, we intend to include a facilitator category through TSPS. Changes to categories, which are client driven, occur through the various methods of supply and then are fed into ProServices.*

4. What also concerns me is how the Commodities that I listed as a Non-IT PS Online professional would fit into the new categories that I read in the appendices of your power point presentation. Please clarify whether the new categories also will include a subsection of "Commodities" again.

*Job descriptions would fall under TSPS category Organizational and Classification consultant. TSPS also has a Technical Writer. TSPS is also looking to add some communications category/class in the near future. All the training categories could be covered in Learning Services.*

5. Your presentation states that "66 existing categories [are] to be replaced by 132 categories from TSPS and TBIPS". While there are several categories of writing services available on PS Online, the only one available in these new categories is "Technical writer". I'd probably qualify as a technical writer, but it's only a small corner of my business. Most writing services required by government departments are for speechwriting, web writing, and other business-related documentation – none of which would be considered "technical". So, I recommend retaining at least one non-technical category of writing (I usually use the term "Business writer"), as the skills needed for different types of writing overlap greatly.

*As explained above, TSPS is already looking into communications category/class.*

6. Will we consider reducing the number of categories.

*No, as PWGSC explained that we have reduced the number of tools used by Clients and created a single e-portal. There should be an expectation of Suppliers to receive contracts.*

7. In your presentation, was your listing of 11 streams and 132 categories indicative of the streams and categories that will appear in the final document released on Merx, or are they the actual streams and categories that will be released?

*While the current list of streams and categories is actual, it could change as TBIPS and perhaps, TSPS will be doing renewals before ProServices is released.*

8. After studying the 11 streams and 132 categories listed in the slide deck you provided, I put the two project management services streams side-by-side and lined up the categories to compare them. With as much duplication as that which exists between these two project management streams, why does project management appear twice in the 11 streams? Why not one generic project management? It seems to me that "project management" like "group facilitation" is a 'soft' specialty that crosses over the 'hard' specialties like PKI Specialist, Platform analyst, etc. In streamlining supply arrangements, making a distinction in ProServices between the soft skills like group facilitation or project management that cross over the hard skills (horizontal generalists x vertical specialists) must be considered.

*We require the 2 different project management categories – 1 is for IT and the other for non-IT. The skill sets are different for IT and non-IT project management categories..*

9. My husband and I are both services providers for our company. We provide quite different services. It will be important for us that we can enrol our company which is currently registered with PSONline in ProServices under the various categories for which we provide services. We cannot create another incorporate company just to be able to enrol all of our services in ProServices.

*When the solicitation is released through MERX, you will enroll in the data collection component when available through the e-portal, and submit a technical proposal showing each category you wish to provide services in, with requested supporting documentation.*

10. Categories of personnel: Since rates are not included in the ProServices process (is this correct?); I wonder if this is even relevant? But if so, I suggest to keep it simple: Senior, Intermediate and Junior consultants only

*All 132 categories will have 3 levels: junior, intermediate and senior.*

11. TBIPS creates artificial barriers. Need ProServices to enable a company to move to TBIPS. \$100K business volume and 3 projects is too high. Need to ensure experience should cover subcontract work.

*PWGSC confirmed that experience will not be limited to Government experience only and confirmed that ProServices should enable companies to move forward.*

12. Should a supplier not be on specific categories on TSPS/PASS or TBIPS although we have resources in all fields will we be eligible to provide resources under Proservices?

*Current TBIPS and TSPS suppliers will be grandfathered to ProServices, with completion of the Data Collection Component. However if a supplier has additional categories they wish to apply for, they must submit through the Data Collection Component and submit a technical proposal with the experience required to demonstrate the capability at the solicitation stage.*

13. Treatment of new entrants is an important part of maintaining a competitive environment.

- a. Some specific training that could be offered to first year registrants includes the effective use of MERX, ProServices, and writing effective RFPs.
- b. There should be no waiting time required for new entrants. The experience of their employees will be the key basis for selection. After they have performed several projects, then there will be a track record of the firm. Firms with multiple employees may have lost a capacity based on previous projects. Firms should indicate that they have the capacity, even though there has been turnover.
- c. In the case of a single person consulting organization, then what you see is both the person's experience and the track record of the firm. Separate reporting should not be required.

*Answers:*

- a. *If a new supplier is unsure how to do business with the Government of Canada, they can contact Buy and Sell. who have seminars on this.*
- b. *ProServices will fall under the harmonized business rules, with perpetual refreshes. A supplier can submit proposals at any time.*
- c. *As part of harmonization, suppliers will have reporting requirements which will be described in detail in the Request for Supply Arrangement solicitation when posted on Merx.*

## **M. Contracting Limits**

1. Concerning the \$25,000 limit, I have heard the argument in other meetings with PWGSC for other mechanisms that it is a legislative requirement and that it is easier to change policies than laws. Can you please tell me where the

\$25K comes from and how long it has been in effect. It will be very interesting for me to calculate the present value of this amount today.

Perhaps some common sense could be applied to the contracting limits given that HST has to be included, e.g. currently in Ontario

\$25,000 limit – actual work value cannot exceed \$22,125

\$10,000 limit – actual work value cannot exceed \$ 8,850

\$ 5,000 limit – actual work value cannot exceed \$ 4,425

Couldn't the limits simply be amended to be 'before tax'?

*The \$25,000 is legislated by the Government Contracting Regulations and can not be changed.*

2. Will the under \$25,000 process remain available? I understand that the ProServices method will be for larger contracts. Is that correct? Will there remain a process of contracting for under \$25,000 that will be easier for SMEs, or perhaps more appropriately micro enterprises? Question asked if the NAFTA threshold and \$25K GCR could be increased.

*ProServices will be for requirements below the NAFTA threshold (\$78,500 currently, and yes the under \$25,000 directed contract will remain in accordance with the Government Contracting Regulations. The NAFTA threshold is regulated by the Government.*

3. Is there a possibility for amendments beyond NAFTA or \$25K, i.e. 50% more. or the requirements up to the NAFTA threshold, can extension or renewals of existing contracts be granted? i.e. can a percentage of the original contract value be renewed or extended without going to tender?

*PWGSC explained that the NAFTA threshold cannot be exceeded. Also, if Government Contracting Regulation was applied for below \$25K, the \$25K cannot be exceeded. However if below, they can be amended.*

## **N. PS Online Questions:**

1. If we get contracts on PSOnline between now and Spring 2013 can they be honoured/run past Spring 2013?

*Yes, they can continue until the contract is completed.*

2. Appreciate work that Vincent is doing. PSO never helped people come together; it was missing categories, had overlap and embedded qualifications. These are destructive. How is PSPD going to engage Suppliers?

*In accordance with the Professional Services National Procurement Strategy, PWGSC will be implementing a governance process that will include both clients and suppliers advising PWGSC on various matters, including review of categories and resource qualifications.*

3. PSO started with a promise; get qualified and you do not need to qualify again. A supplier is either qualified or not?

*ProServices will be replacing PSOnline and will start with TSPS and TBIPS suppliers being grandfathered. There are approximately 132 new categories. A current PSOnline supplier will have to submit a new technical proposal and enter their company data through the Data Collection Component when released.*

## **O. Reporting requirements**

2. It was mentioned by a supplier that reporting is redundant given the various departments are aware of the purchases via the different vehicles they make. Why do both supplier and client have to report? I agree that the accounting should be done on the buyer side. Will there be reporting requirements and what are those expected to look like?

*Suppliers will have to do reporting, not client departments. The reporting will be with utilization reports, which will be explained in the Request for Supply Arrangement when released into Merx.*

3. Will there be a "tracking" method of usage of ProServices?

*Yes, starting with utilization reports from suppliers. The long term plan will be automatic tracking through CPSS.*

4. Cannot ask for reports from Suppliers and cannot state a cut off.

*The utilization reporting will be explained in the Request for Supply Arrangement. There will be specific dates when the reports are required.*

## **P. How to Proceed**

1. Would you be good enough to direct me as to how I proceed from here? If I must re-qualify for ProServices, how do I begin?

*Once the Data Collection Component is released in November 2012, you can then enroll into CPSS. Once the solicitation is posted on Merx, you would have to submit a technical proposal to the contracting authority and also enroll into the Data Collection tool.*

2. I went to CPSS but it wasn't obvious how to enroll. Could you please provide some guidance?

*You can not enroll until the Data Collection Component is released, target date of late November 2012, then you would be able to go into CPSS.*

3. At the consultation you mentioned accessing the new portal, are we supposed to sign up now or wait for the instructions next month?

*See answer 2 above.*

4. Will the related Request for Supply Arrangement solicitation mentioned be emailed out, or will we need to check on Merx for its arrival.

*It will be posted on Merx for a minimum of 40 days.*

5. Does PSPD have an estimate on how much time it will take for companies to respond to the ProServices' solicitation.

*It is estimated it will take about 3 weeks to respond.*

6. Question re the next steps for qualifying?

*There will be the single e-portal, into CPSS which will be released in late November. It should be a lot easier for suppliers to respond.. Suppliers chances should be increased to get business.*

## **Q. TBIPS questions**

1. If there are categories that map well to the categories in ProServices, e.g. cyber protection, can grandfathering occur?

*PWGSC explained that the initially TBIPS and TSPS categories will be included in ProServices. In the specific case of cyber protection, TBIPS will handle this.*

2. We have been waiting for over 18 months for the TBIPS refresh so we can apply however, the re-fresh was never posted and would like to know if we can submit an application now. Can you please let me know if we can start this process.

*TBIPS will be refreshed in late Fall 2012 and you will be able to submit your offer at that time.*

3. For solicitations above the NAFTA thresholds (\$ 78.5 K), it is proposed that RFPs will be on the street for a minimum of 15 days and sent to a minimum of 15 suppliers. This appears to run contrary to the spirit of reducing the administrative burden and cost to the vendor community. Although we understand that the government is trying to make the competitive process more inclusive and fair, we are concerned that this approach will actually be more detrimental to the supplier community. Therefore, can the status quo remain (e.g. minimum 5 suppliers, minimum 5 days)?

*The new engagement rules of the Professional Services National Procurement Strategy were established through extensive consultations last Fall and it applies to all methods of Supply covered by the Strategy, TBIPS being one of them. The new engagement rules will apply in the refreshed TBIPS.*

4. In the presentation, it was indicated that all opportunities (except sole-source) under NAFTA thresholds will fall under ProServices. In some cases, we receive TBIPS or TSPS RFPs where the initial contract is valued under \$ 78.5 K but when factoring in the option periods (non-obligatory), exceeds the NAFTA thresholds. For example, let's say an RFP is released with an initial contract value of \$ 50 K, but the potential option periods take the contract total to potentially \$ 200 K. Under the new procurement terms, would clients be obligated to take this opportunity to ProServices, given the initial

contract value of \$ 50 K, or could they proceed with TBIPS or TSPS given that the total potential value of the contract is \$ 200 K?

*The value of a procurement process is always based on its initial cost and any additional cost defined as option(s). ProServices will only be used for requirements below the NAFTA threshold. If estimated above the NAFTA threshold, then TBIPS or TSPS must be used.*

5. I would encourage the Government of Canada to extend automatic qualification to all TBIPS qualified vendors, for those categories for which they are TBIPS qualified. We deem this as appropriate because the TBIPS qualification process was very demanding in terms of the effort required and because contracts under \$78.5 K are the most probable contracts to be won by our JV members.

*It is proposed to grandfather current TBIPS qualified suppliers into ProServices.*

6. Can contracts of a security nature still be awarded up to the NAFTA threshold through CPSA?

*Yes. Until the next TBIPS refresh is completed, all current processes apply. Once TBIPS will be in place with the new Cyber Protection Services stream, the Cyber Protection Supply Arrangement will be sunset.*

7. As mentioned, CPSA will be rolled up into TBIPS by next summer. CPSA suppliers that are currently not on TBIPS are going to be asked to put in a response to the refresh expected out November 2012. ProServices likely will grandfather in TBIPS suppliers. If a company is successful in the TBIPS refresh this fall are they also grandfathered in for inclusion on ProServices? How will the award of TBIPS in the spring and the desired launch of ProServices in the Spring work? Would it be recommended that vendors do both the TBIPS refresh and the ProServices response?

*TBIPS will be awarded before ProServices. The 2 methods of supply will be issued sequentially.*

8. For contracts below the NAFTA threshold, how will TBIPS be affected?

*PWGSC explained that ProServices will be mandatory for requirements below NAFTA; the business will still exist but through ProServices. Above NAFTA, requirements will be through TBIPS..*

9. TBIPS creates artificial barriers. Need ProServices to enable a company to move to TBIPS. \$100K business volume and 3 projects is too high. Need to ensure experience should cover subcontract work.

*PWGSC confirmed that experience will not be limited to Government experience only and confirmed that ProServices should enable companies to move forward.*

10. If there are categories that map well to the categories in ProServices, e.g. cyber protection, can grandfathering occur?

*PWGSC explained that the initially TBIPS and TSPS will be included in ProServices. In the specific case of cyber protection, TBIPS will handle this.*

11. Will TBIPS and TSPS still exist?

*Yes, they will be used for requirements above the NAFTA threshold.*

12. Regarding the 132 categories, can the term "facilitator" or "facilitation" both IT and non-IT be considered as categories and added (such as group facilitation, knowledge Mgmt facilitation, etc.)?

*Suggestions to improve are welcome and TSPS will take this category into consideration this request. Learning Services SOSA does have a category for Training Facilitators.*

13. I have used TBIPS as an option with a client. I worked on a contract via one of the large body shops who had the SOA. The work was completed but at a much higher cost to Canadians than was necessary. The company upped my PSONline rate by 20% so my client had to pay more + my client had to expend lots of time (\$) going through all the hassle of writing a complicated RFP and evaluating bids. We both agreed, that in retrospect, it would have been easier and cheaper for them to just hire me on a sole source basis. But their contracting authorities made this next to impossible for them even with a contract under 25K

*The value of a procurement process is always based on its initial cost and any additional cost defined as option(s). You will have to become qualified yourself under a specific Method of Supply*

14. I see RFPs that go out in TSPS and TBIPs which the wrong categories are used. Case in point 6 resources for business process modelling and simulation put under an IT category. So what happens IT firms and agencies submit resources who truly only meet a small percentage of the client's requirements, yet fit well under the category. So the quality of work suffers because you have an IT resource who has used the IT tool being used in the process simulation but is not a process management expert who best understands how to optimize process taking in consideration the change management requirements, organizational structure etc. in essence the Crown pays a premium for a handyman when they need an engineer, quality suffers and the government does not build the needed capacity. The solution you need to this problem is to mistake proof the process. This means you need to find a way to better guide the client departments to ensure they use the right categories. The way you could do this is by incorporating a word match tool in which they select key words from a skills inventory which then gives them a list of possible categories to draw from. This technology does exist as we use it with our inbound marketing efforts.

*The clients are provided with a guidance tool when they access the CPSS. This tool re-directs the client towards the IT or the non-IT based methods of supply. It is not perfect and the client can choose to ignore it but we have built a decision tree type application to facilitate the clients' experience and hopefully limit the type of situation described above.*

## **R. TSPS questions**

1. Facilitation is not listed - most important gap - Facilitation is not included in the TSPS supply categories. I know that I looked at the TSPS a few years ago and concluded that I could not squeeze myself into the categories. I understand that other facilitators could not find themselves in the categories. Is it the aim to excluded facilitation? At the time I wrote a note and received a reply that PWGSC would look at creating a Facilitation category in the future. Is now the time?

*Suggestions to improve are welcome and TSPS will take into consideration this request to add a facilitator within its scope.*

2. I noted in the presentation that under TSPS (which our company is listed on in the Project Management Services Class) additional streams will be added. In our case we are most interested in the the COMMUNICATIONS SERVICES stream. This will be an exact fit for our company if the TSPS is grandfathered into the new ProServices. If not we will need to look at reapplying for the new ProServices (assuming there is a communications category). We are also currently on PSONline for all levels of communications services (which will not be grandfathered in). When will the decision be made whether or not the TSPS will be grandfathered in?

*The decision has been made to grandfather in TSPS and TBIPS suppliers. However TBIPS will be doing a refresh before ProServices is launched, so there may be more additional categories than the 132 listed in the presentation.*

3. When will the additional categories (communications) be added to the TSPS? Will it be in time to upgrade our listing on the TSPS before ProServices goes live? If the streams are not updated on the TSPS on time, will there be a communications services category on the new ProServices?

*In response to feedback received during the consultations, PWGS is investigating delaying ProServices and renew TBIPS And TSPS first. More details will follow. Communications will only be put into ProServices when it is part of TSPS.*

4. Can we apply in the communications services category on ProServices and still keep our SA listings in Project Management Class on the TSPS (again assuming the TSPS is grandfathered in).

*You can apply for any category on ProServices when the solicitation is posted on Merx. If you wish to apply for a different category than what you are qualified for in TSPS, you would have to submit a technical proposal when the Request for Supply Arrangement is posted on Merx, as well as enter the data collection component through CPSS. However, we will not be adding in different categories than what is listed in the RFSA, which are being grandfathered from TSPS and TBIPS. . ProServices has no bearing on whether you keep your SA listing under TSPS.*

5. I found the TSPS criteria to be too restrictive/onerous to permit me apply. It seemed to be geared to larger firms. While that may be so, it would seem to preclude many smaller, competent organizations from applying. I know of other facilitators who tried to group together to apply and gave up on the attempt. (As I recall there was a tremendous amount of questions and updates as the response period continued). Often under TSPS, the specific requirement (RFP) is different / very specific from the broadness of the category that the supplier qualified under so then they can't actually bid on the requirement. This maybe a big issue/challenge of the new Supply Arrangement.

*TSPS criteria were created in consultation with industry, clients departments and Office of Small & Medium Enterprise. The number of amendments is unfortunately out of TSPS' control as they are created mainly to answer the questions received from suppliers.*

6. Will the SO (Task-based) and SA (Task / Solution) only be applicable for work above the NAFTA limits and only ProServices will be used for work below NAFTA limits?

*ProServices will be mandatory for requirements below the NAFTA threshold. Above NAFTA will use the TBIPS and TSPS.*

7. We have applied to all of these and were successful on the last one (SA-Solutions). This is because of the rates we proposed for the others (Task-based SA and SO). We are in essence an "Inactive Standing Offer". Is that correct? Can our firm be grandfathered into ProServices based on the SA for Solutions for which we were successful for tier 2 projects?

*Only the suppliers who are qualified in the TSPS SO or SA task based will be grandfathered.*

8. What happens to the rates that a firm quoted in a SO? We mean, will these be used eventually for a ProService bidding process? Can new rates be proposed?

*There are no per diem rates for ProServices, the rates will only be given in the RFP at stage 2.*

## **S. National Procurement Strategy**

1. Like the direction of the National Strategy, but do not understand the schedule. TSPS and TBIPS were refreshed (renewed) in 2011 and now TSPS will not be renewed again until 2013. Need to look at this.

*PWGSC explained the approach for the harmonization of methods of supply. Also TBIPS will be refreshed in November 2012, and based on consultations we are looking at a TSPS refresh before ProServices is launched.*

2. There is a problem with Clients selecting 10 Suppliers for the minimum of 15. The random should select the 10, which gives more opportunities to companies who are not well known.

*PWGSC explained the consultative process which occurred for the Professional Services National Procurement Strategy, with clients and suppliers.*

3. Under the Common Business Rules slide, in the "New" row, it states that "Departments decide # of bidders and # of days within existing supply arrangements" for "Up to 25k" and "From \$25K to \$78.5k". It also states that "Directed contracts permitted according to GCR's" for "Up to 25k"

A couple of questions:

- a. For the directed contracts, is it a requirement that the selected vendor be on a supply arrangement (i.e. ProServices)
- b. Could you please clarify the requirements for contracts under \$78.5k? While departments can decide # of bidders and # of days, are there any constraints at all? What if a department were to decide 1 bidder and it was open for 1 day? Essentially that allows directed contracts for anything under \$78.5k.

Answers:

- a. *Yes the selected vendor must be on a supply arrangement.*
- b. *For solicitations between 25K and 78,500K, there must be a minimum of 2, PWGSC recommends 3 and it must remain open for at least 5 days.*

## **T. Training**

1. Will we and our government contacts/clients be trained on how to use ProServices prior to it going live? Will it be Webinars or onsite training?

*Presently there is no plan to offer specific training on ProServices. However, prior to having access to ProServices, clients will have to take the Mandatory Training on "How to use PWGSC's Professional Services Supply Arrangements", which includes the business rules for requirements under NAFTA. The training will be a self-paced eLearning course.*

2. It was mentioned by a supplier that PS Online was a failure mainly due to training. He asked that if it is rolled out to ensure everyone is trained appropriately.

*Prior to having access to ProServices, clients will have to take the Mandatory Training on "How to use PWGSC's Professional Services Supply Arrangements", which includes the business rules for requirements under NAFTA.*

## **U. Learning Services**

1. Will ProServices change the approach of Canada Schools?

*PWGSC explained that Learning Services is not yet part of ProServices. The Canada School of Public Service (CSPS) has indicated to PWGSC that they will no longer issue their own Standing Offers and instead begin using the Learning Services SOSA.*

*CSPS is a member of the Learning Services SOSA Advisory Committee*

2. When Learning Services becomes part of ProServices, will the Learning Services Suppliers be grandfathered?

*The intent is to add the Learning Services SOSA categories to ProServices in the future, similar to that of TSPS & TBIPS.*

## **V. General Questions**

1. Many of the slides in the deck seemed to be more appropriate to an internal PWGSC presentation rather than one focused on the benefits and needs of suppliers.

*Agreed, however, we wanted to give an overview of the results of the Professional Services National Procurement Strategy.*

2. Could you confirm that I documented correctly the SA solicitation on Merx #E60ZT-120001?

*Yes that is the correct number.*

3. For solicitations above the NAFTA thresholds (\$ 78.5 K), it is proposed that RFPs will be on the street for a minimum of 15 days and sent to a minimum of 15 suppliers. This appears to run contrary to the spirit of reducing the administrative burden and cost to the vendor community. Although we understand that the government is trying to make the competitive process more inclusive and fair, we are concerned that this approach will actually be more detrimental to the supplier community. Therefore, can the status quo remain (e.g. minimum 5 suppliers, minimum 5 days)?

*These numbers are based on the Professional Services National Procurement Strategy with consultations across the country with clients, suppliers and the Office of Small & Medium Enterprise.*

4. Can a company have multiple profiles?

*PWGSC confirmed that a single PBN has a single profile. (Procurement Business Number).*

5. Why not include THS?

*VR explained the 3 requirements for the use of THS and how this is separate from ProServices, however, THS will be streamlined for consistent business rules.*

6. Will SELECT be part of ProServices? When looking at the proposed categories in PSO, nothing fit from SELECT.

*PWGSC confirmed that SELECT would not be part of ProServices, at this time. PWGSC acknowledged that companies remain in SELECT. Categories in ProServices currently respond to TBIPS and TSPS.*

7. How does ProServices fit into the Shared Services or will Shared Services be using ProServices?

*They may.*

8. Multiple companies with single ownership/management, invited to compete against each other on the same requirement - within the National Capital Region, there are numerous companies qualified under TSPS, TBIPS and PS Online that report and are owned by the same individual(s) and management. This ownership / management situation has been created in some cases through acquisition or perhaps by design. Based upon our first hand observation of some TBIPS and TSPS bids, there have been TBIPS and TSPS RFPs issued which invited some non-arms' length or "sister" companies (or even joint ventures with the same companies as participants) to "compete" against their own organizations to the exclusion of

other corporations. Some of these entities have been obtaining multiple invitations to participate in a bid. Given the rules around bid rigging and competition, it seems un-reasonable that this should be permitted.

I do not foresee there being any issues with the number of companies being invited, but it is not apparent how the Crown benefits if ABC Co, XYZ Co (both owned by the same person) and / or ABC Co in joint venture with another firm should be given more than one invitation to participate in the same limited-invitation RFP thereby causing other potential vendors sit on the sidelines. Therefore, as part of the pre-selection / invitation process, will PWGSC please consider limiting the invitation list on RFP requests to include only one of the corporations / JV's that are related by ownership, management or as pre-qualified joint ventures on any single requirement?

*We can not limit competition. The search results will come up with the appropriate qualified firms.*

9. It was mentioned that there will be a change in the way departments receive bids with a recommendation of 1 hard copy and 2-3 soft copies, specifically USB memory sticks. At a presentation we attended last year it was mentioned by Tom Ring that paper would, as much as possible be eliminated. Also memory sticks are costly to any organization especially if you respond to as many as we do in any given week. Would it not be best to continue along the paperless trail and have the bids sent in electronically? Would we be able to recuperate our memory sticks upon final review of bid by the department?

*We can not receive them electronically. We will not return memory sticks upon completion of evaluations.*

10. We are getting confused by the number of contracting vehicles. Here are some of the vehicles we understand exist.
- a. ProServices (soon to replace PSONline). Is ProServices part of Task and Solutions Professional Services (TSPS) or outside TSPS?
  - b. Under the TSPS, we found:
    - i. Standing Offer for Tasks that came out in 2011 "TASK BASED REQUEST FOR STANDING OFFER" (this required us to write a proposal including client experiences and per diem rates)
    - ii. Supply Arrangement for Tasks that came out in 2011: Professional Services (Tier 1: Below NAFTA; Tier 2 up to 2,000,000 and Tier 3: \$2,000,000) (this required us to write a proposal including client experiences and per diem rates)
    - iii. Supply Arrangement for Solutions that came out in 2010. This one had 2 tiers: Tier 1: projects below \$300,000 and tier 2: projects above \$300,000

Are we missing one vehicle or confusing one vehicle with the other? Is there a PWGSC site that clearly explains the difference between all of these? We try to find one but could not.

- a. *ProServices is a new method of Supply to replace PSONline. It will comprise of categories from TSPS and TBIPS, but it will be outside TSPS.*
- b. *The 3 procurement vehicles mentioned above are all for TSPS. There is no website explaining the differences. However the following website explains briefly the different professional services methods of supply : <http://www.tpsgc-pwgsc.gc.ca/app-acq/services-eng.html>*

11. Will the RCMP be using this method of supply?

*Once the Master Level User Agreement is signed, they will be able use it.*

12. Can a supplier find out how much dollar value is spent in a specific commodity?

*This can only be answered through an ATIP request.*

13. Is there someone to talk to about getting online invoicing for companies. OSME has been approached, but not getting any information?

*Please contact Mr. John Jordan, Senior Manager, at Buy and Sell : [john.jordan@tpsgc-pwgsc.gc.ca](mailto:john.jordan@tpsgc-pwgsc.gc.ca)*

## **W. Conclusions:**

- The goal is not to solve all of the problems, but the aim is 80% solution with a commitment to continuously improve.

- Based on the consultations, PWGSC is looking to release both TBIPS and TSPS renewals before ProServices, and issue a draft solicitation for ProServices.
- PWGSC advised that attendees of the session will be kept informed of when the solicitation for ProServices would be released.
- Need to ensure Suppliers understand that ProServices supports the methods of supply, starting with TBIPS and TSPS (task based). Changes to categories occur through the various method of supply and then are fed into ProServices.
- Experience:
  - Not restricted to Government experience; experience includes private and public sector.
  - A project identified as a subcontractor can be used by the Company, and also be used as part of a JV.
- Data Collection Component will be launched in November (16 November 2012) and ready for use by ProServices' bidders after the solicitation is released.
- Need to improve training of Clients to ensure:
  - Clients understand how to apply evaluation criteria
  - Clients understand the requirement of quickly sending the contract to the successful Supplier, i.e. if 5 days were given to a Supplier to respond, the same amount of time should be taken by the Client to complete evaluations and release the contract.
- Based on feedback from the consultations, PWGSC will be adding a facilitator category into TSPS.