



Professional Services Contracting process and National Procurement Strategy

**Presentation to
Canadian Institute for Procurement and Material Management (CIPMM)**

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Public Works and
Government Services
Canada

Travaux publics et
Services gouvernementaux
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Objectives

- Inform you on the Professional Services National Procurement Strategy
- Inform you on some of our main Professional Services procurement tools



Professional Services National Procurement Strategy

- PS Steering Committee
- Objectives:
 - Common business rules for main Tools
 - Single governance
 - Harmonized user training
 - Support for statements of work and evaluation criteria
 - Common ePortal



Professional Services National Strategy

What this means for clients

- Predictable environment & timelines
- Improved clarity and consistency
- Simpler & faster contracting process
- Improved Ease-of-use
- More flexibility (use of either SO or SA)
- Simple Online Training
- Single ePortal access for all main tools
- Pre-qualified Suppliers



What this means for clients (continued)

- Multiple pre-approved Security Requirement Checklists (SRCLs)
<http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/31-eng.html>
- More efficient procurement process than traditional procurement
- Reduced solicitation periods
- 1 MLUA per department/agency for all methods



Standing offer (SO) vs. Supply Arrangement (SA)

- **Standing Offer**
 - Dynamic Right of First Refusal Process / Group Invitations
 - Client Department just needs a Statement of Work
 - Client Department determines the team
 - Clients can issue call-ups up to \$250k,
 - PWGSC approval required for call-ups over \$250K
 - Directed Call-ups up to \$25K
- **Supply Arrangement**
 - Client Department can ask for a 'solution' (Supplier proposes team)
 - The number of calendar days for a solicitation period depends on the requirement \$\$\$ value
 - Client needs a Statement of Work and Evaluation Criteria
 - Client can add additional resource qualifications and evaluation criteria
 - RFP Model provided by PWGSC
 - Can handle requirements of any \$\$\$ value
 - Directed Contracts up to \$25K



Example of Common Business Rules

(supply arrangements)

- Financial evaluation at the RFP stage only - no Ceiling Rates
- Minimum Number of bidders to be invited
- Solicitation period
- More frequent opportunity for qualify (suppliers)
- Supply Arrangement (ProServices) that creates a level playing field for SMEs up to NAFTA



Harmonized Training

Standing Offer	Supply Arrangement
Procurement Basics for Professional Services (6901)	
How to use PWGSC's Professional Services Standing Offers under Common Business rules (6902)	How to use PWGSC's Professional Services Supply Arrangements under Common Business rules (6903)

- Online training is available in PWGSC's Learning Management Systems in both Official Languages
- Users only have to take the required training once.
- ALL Existing Users must complete the training in order to maintain their CPSS ePortal access

More Information at: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/pfel-otp-eng.html>



Master Level User Agreements

- Replacing Individual MOS User Agreements
- Covers all Professional Services MOS issued by the Services and Technology Acquisitions Management Sector (STAMS)
- Requires ADM (or ADM Level Equivalent) signature from Client
- PWGSC Client Engagement Sector works pro-actively with clients to have MLUAs signed
- Clients may request to establish a Master Level User Agreement by contacting the following link: spts.tsps@tpsgc-pwgsc.gc.ca
- More info at:
<http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/cadres-master-eng.html>



SOW / Evaluation Criteria

- Samples on GCPedia
<http://www.gcpedia.gc.ca/gcwiki/index.php?title=User:Keeton.Wilcock/Sandbox11&setlang=en&uselang=en>
- Starting with TSPS categories
- Looking for your feedback on approach
- Send us your comments:
ServicesProfessionnels.ProfessionalServices@tpsgc-pwgsc.gc.ca



Professional Services National Strategy

What's next ?

- Launch of a New Professional Services Landing Page
- New tools to support SOW and evaluation criteria development
- Possible integration of other Methods of Supply into ePortal
- Express RFP process & tools
- Advisory committee (comprised of clients & suppliers)



Task Based Informatics Professional Services (TBIPS)

- TBIPS is a government-wide mandatory procurement tool for the provision of informatics professional services
- Offers both a Standing Offer and Supply Arrangement

Streams are available in TBIPS

Application Services	Business Services	Project Management
Geomatics Services	Telecommunication Services *	
IM/IT Services	Cyber Protection / IT Security Services *	

* Migrated from CPSA and TEMS December 2013

<http://www.tpsgc-pwgsc.gc.ca/app-acq/sptb-tbps/index-eng.html>



Solutions Based Informatics Professional Services (SBIPS)

- SBIPS is a government-wide mandatory procurement tool for acquiring Solution Based Informatics Professional Services.
- Offers a Supply Arrangement
- The business rules will be harmonized to the National Strategy in Summer 14/15

The following Streams are available in SBIPS

Business Transformation	Information Mgmt / Business Intelligence	Managed Services
ERP / CRM	IT Systems Mgmt	Network Services
Geospatial Informatics	Legacy Support & Transition	Security Mgmt
Systems Integration		

<http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spics-sbips-eng.html>

Task and Solutions Professional Services (TSPS)

- TSPS is a government-wide mandatory procurement tool for the provision of non-IT Professional Services
- Offers both a Task based SO and SA as well as a Solution based SA

The following Streams are available in TSPS

Human Resources Services	Business Consulting / Change Management
Project Management Services	Real Property Project Management
Technical Engineering and Maintenance Services*	

*Migrated from TEMS in January 2014

<http://www.tpsgc-pwgsc.gc.ca/app-acq/sptb-tbps/index-eng.html>



ProServices

- ProServices is a government-wide mandatory procurement tool for professional services categories (150) relating to TBIPS and TSPS, for requirements under the NAFTA Threshold (currently \$80,400).
- Replaces PS Online.
- Is the single mandatory Supply Arrangement for requirements under the NAFTA threshold, including requirements covered by TBIPS and TSPS.
- ProServices web site is:
<http://www.tpsgc-pwgsc.gc.ca/app-acq/sp-ps/index-eng.html>



Learning Services

- Learning Services is a government-wide procurement vehicle designed to provide access to pre-qualified suppliers who can:
 - Create, update or convert government owned training courses including training material for:
 - Traditional Classroom based training;
 - ELearning / on-line training; and/or
 - Blended Learning.
 - Deliver government owned training.
- Can be used for any type of training content (any subject).

<http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/sa-ls-eng.html>



Professional Audit Support Services (PASS)

- The Professional Audit Support Services Supply Arrangement (PASS-SA) is a government-wide mandatory procurement tool for the provision of professional services required to meet the obligations set by two Treasury Board policies: the Internal Audit Policy and the Internal Control Policy
- The PASS SA contains the following streams:

Internal Audit Services	External Audits
Practice Inspection	Financial Accounting Services
Information Technology and System Audits	Internal Audit Controls
Forensic Audits	Receipt Contribution Agreement Audits

<http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/aaspsv-passa-eng.html>



Other Professional Services

- Language Training
- Ergonomic Services
- Independent Reviewer Services
- IM / IT Database Subscriptions
- Optical Scanning & Data Conversion
- Technology Research Subscription
- Mediation Services
- Collection Agency Services
- Food and Safety, Env and ISO 9001
- Investigative Services for Harassment in the workplace
- Alternative Dispute Resolution Services
- Brokerage Insurance and Risk Management Services
- Software Licensing Supply Arrangement (SLSA)
- Disposal of Electronic Waste Services
- Advisory/Investment Banking Services
- Investigative Services related to wrongdoing
- Peoplesoft COTS Training
- COTS training
- SAP COTS Training
- Transcription Services
- National Investigation Service
- Commissionaire Services
- Commercial Security Guard Services
- Air Charter Services
- Diving Services
- Executive Search
- Guards and Matrons Insurance
- Mortuary Affairs
- Etc...





Temporary Help Services in the NCA & Building a National Strategy

**Presentation to
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Temporary Help Services (THS)

* not part of the Professional Services National Procurement Strategy

- Not accessed through CPSS ePortal and supported through THS Online
- THS can only be used when:
 - a public servant is absent for a temporary period of time
 - additional Staff is required for a temporary workload increase
 - a position is vacant and the staffing action is being completed

The following Streams are available in THS:

Stream 1: Office Support	Stream 4 – Technical Services
Stream 2: Administrative Services	Stream 5 – Professional Services
Stream 3: Operational Services	Each with Levels and based on a Qualifications combining Education, Experience and Assets

<http://www.tpsgc-pwgsc.gc.ca/app-acq/sat-ths/index-eng.html>

20

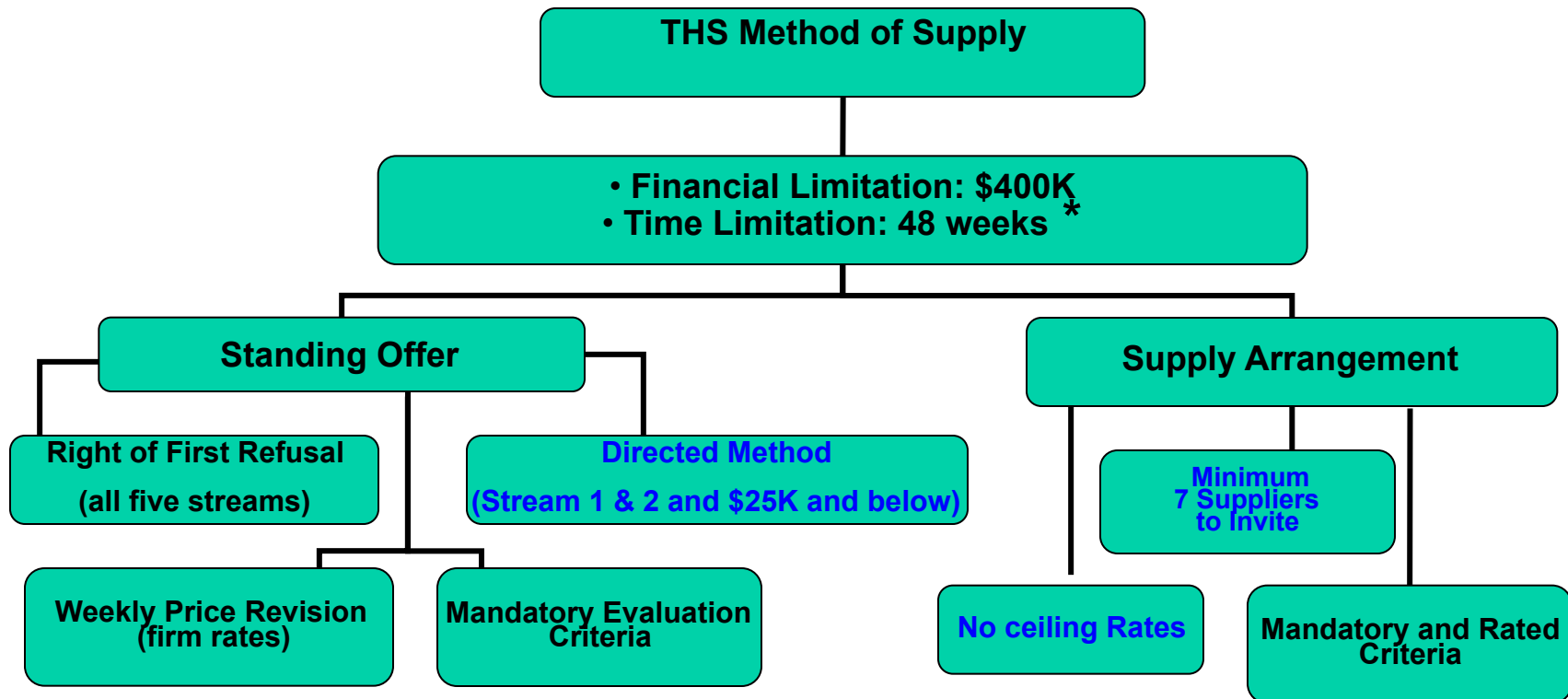


THS Overview

- Temporary Help Services (THS) should be used only when there is a need for temporary employees to complement internal teams. In using the THS, a project authority commits to providing the strategic direction, oversight and monitoring of the work for which the resource is contracted.
- THS **should not be used** when a project authority seeks a solution to departmental business requirements and therefore needs support from a supplier with expertise in that area.
- <http://www.tbs-sct.gc.ca/pass-spsv/gc-gpm-eng.asp>



THS Framework Overview



* Up to 24 weeks extension subject to PWGSC review and approval

22



New Harmonized Training

Standing Offer	Supply Arrangement
How to use PWGSC's Standing Offers and Supply Arrangements to obtain Temporary Help Services (THS) in the National Capital Area (NCA).	

- Online training will be available in PWGSC's Learning Management Systems in both Official Languages
- Users only have to take the required training once.
- ALL Existing Users will be required to complete the training in order to maintain their THS Online Access
- More Information will be issued to both existing and new users.
- [Temporary Demo Link](#)



National Goods and Services Procurement Strategies

Phase 1

- Food and Beverage
- Civilian Audio Visual
- Clothing and Textiles
- Communication Services
- Janitorial Services
- Medical Equipment and Medical Supplies
- Office Equipment
- Office Furniture
- Professional Services
- Research and Development
- Vehicles

Phase 2

- Business Support Services
- Civil Engineering Services
- Environmental Remediation
- Environmental Services
- Language Training Services
- Print/Publish/Reproduction
- Travel
- Armament
- Temporary Help Services**
- Translation Services
- Training Services

Phase 3

- Energy
- Fuels/Lubricants
- HR & Benefits
- Infrastructure
- Office Supplies
- Telecommunications
- telecommunications and Voice



National Goods and Services Procurement Strategies

- Early strategies were driven by issues and challenges – resulting in process oriented results.
- Identified need for Clear linkage between Executive involvement and success
- NGSPS were treated as similar to transactions in procurement organizations
- In order to “break the mold” engaged vertical group (DG to PG) to frame client needs
- Simplifies and strengthens procurement strategy development process
- Concurrently mobilizes the organization
 - Environmental Remediation AB & RPB, all regions and HQ participating in Scenario Development
 - Language Training – a simplified menu of service offerings for client
- Scenarios Validated with stakeholder then drive action.
 - In the same manner that a car company starts from the « family car » concept and starts engineering
- Integrates the organization around common objectives – rather than around process
- Develop relevant and operationally effective strategies

25



Menu of Services Scenarios

Scenarios will present choices to government departments and agencies:

- Identify the core concept – the need
- Change the way we do business;
- Manage the risks;
- Increase productivity;
- Create an existing centre of management; and
- Establish performance measures



Temporary Help Services Scenarios*

1. Project Team Scenario
2. Administrative Support Pool Scenario
3. Operational/Seasonal Scenario
4. Long Term Absence Scenario
5. Remote Knowledge Worker Scenario
6. Flexible Workforce Scenario
7. Coordinated Resources Scenario
8. Special Event Scenario

***These are only examples of scenarios**

- Collaboration between STAMS and OSME-SE Management (DGs to PGs)
- Preliminary response has been positive
- Consultation focuses on:
 - Validating scenarios
 - Identify risks and benefits
 - Mitigation options





Questions?

