ProServices
Professional Services

Business and Technology Solutions Sector (BTSS)

April 2021

Overview: Methods of Supply (MoS)
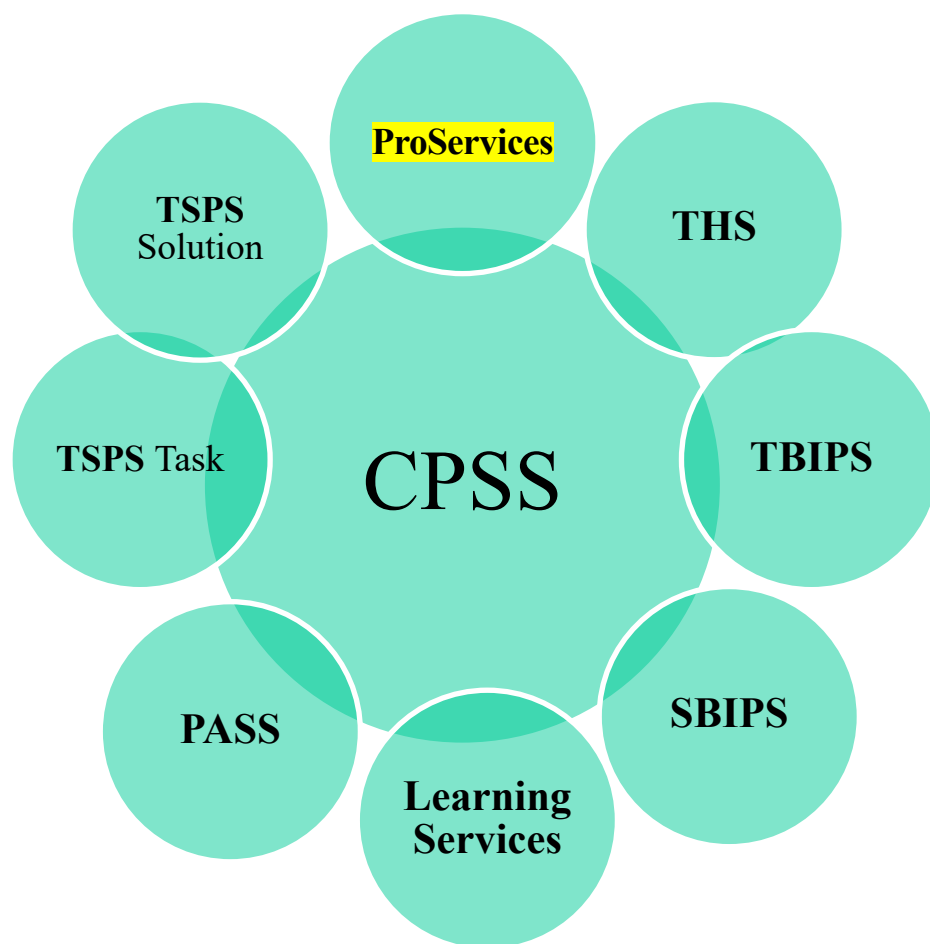
- **ProServices** IT and non-IT related

- **TSPS** Tasks and Solutions Professional Services
  (SA & SO non-IT **task** based)
  (SA non-IT **solution** based)
- **THS** Temporary Help Services

- **TBIPS** Task Based Informatics Professional Services

- **SBIPS** Solution Based Informatics Professional Services

- **PASS-SA** Professional Audit Support Services Supply
  Arrangement
- **Learning Services**

https://www.tpsgc-pwgsc.gc.ca/app-acq/contact-eng.html

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Common Rules – At a Glance
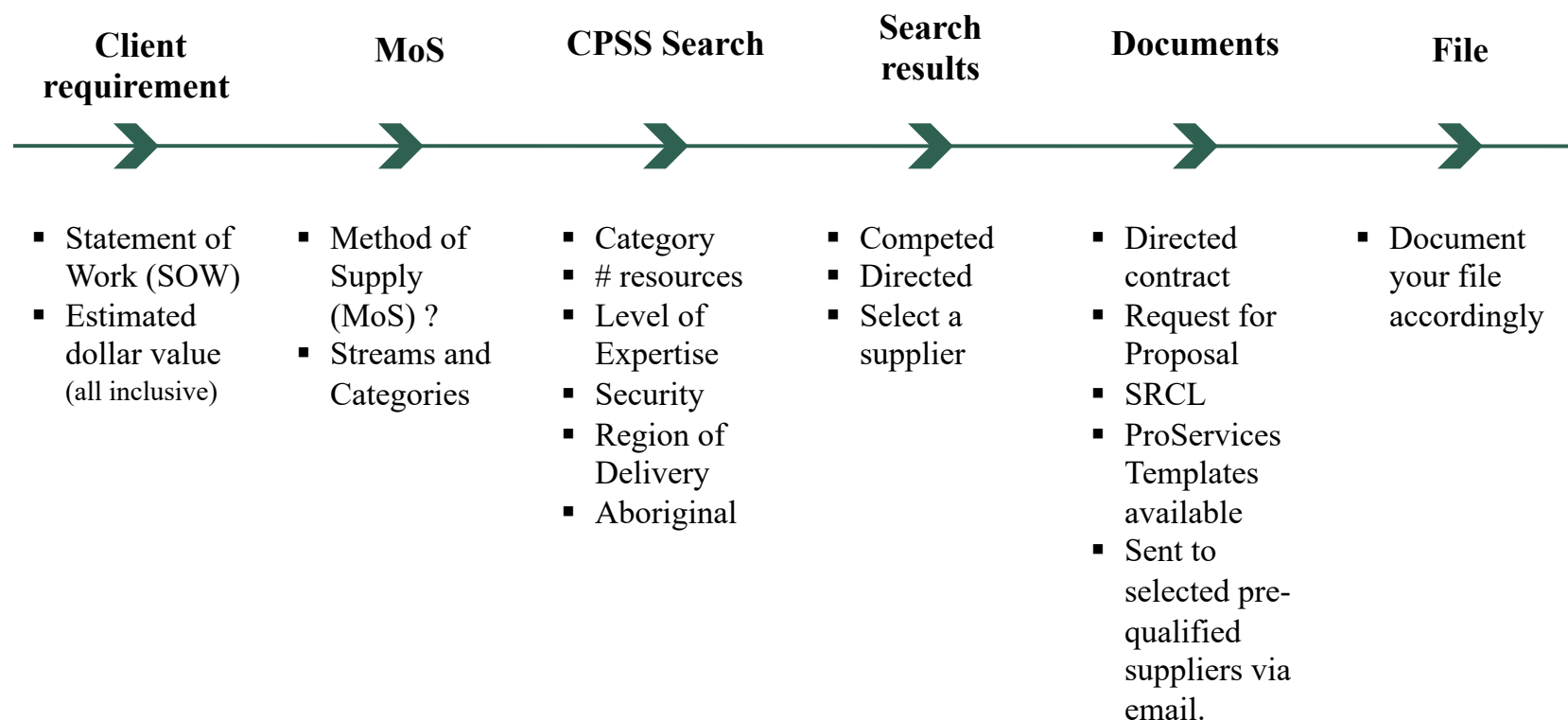
Harmonized Business rules for MoS

Supply Arrangements and Standing Offers

** May 31, 2021 TSPS SOs expire

	Method of Supply Rules—At A Glance					
MoS	**SO** 0-40K	**SO** 0-250K	**SA** 0-40K (directed)	**SA** 0-CKFTA (competed)	**SA** CKFTA-3,75M Tier 1	**SA** Over 3,75M Tier 2
ProServices			√	√		
TBIPS					√	√
SBIPS (sol)			√	√	√	√
TSPS (task)	√	√			√	√
TSPS (sol)			√	√	√	√
PASS-SA			√	√	√	√
Learning Services	√	√	√	√	√	√

	Business Rules common to all MoS					
Rules	**SO** 0-40K	**SO** 0-250K	**SA** 0-40K	**SA** 0-CKFTA	**SA** CKFTA-3,75M Tier 1	**SA** Over 3,75M Tier 2
Min. # of Suppliers to invite	1	1-10 Right of First Refusal applies	1	2	15	All
Min. Supplier response time (days)	2	2	0	5	15	20

ProServices process

Client requirement

- Statement of Work (SOW)
- Estimated dollar value (all inclusive)

MoS

- Method of Supply (MoS) ?
- Streams and Categories

CPSS Search

- Category
- # resources
- Level of Expertise
- Security
- Region of Delivery
- Aboriginal

Search results

- Competed
- Directed
- Select a supplier

Documents

- Directed contract
- Request for Proposal
- SRCL
- ProServices Templates available
- Sent to selected pre-qualified suppliers via email.

File

- Document your file accordingly

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What is ProServices ?

- Mandatory Method of Supply for Professional Services to be used by all Departments

- Supply Arrangements (SA)

- Requirements below Canada Korea Free Trade Agreement - CKFTA (currently at $100K*) came into effect July 1, 2020.

- Supply Arrangements cannot be used for services to locations in areas subject to any of the Comprehensive Land Claims Agreement (CLCA)

* Including all applicable taxes, travel, living expenses and amendments

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What is ProServices ? (cont'd)

- 14 Streams (166 categories)
  - Stream 1 – 7 for **IT** related (mirrored from TBIPS)
  - Stream 8-12 for **Non-IT** requirements (mirrored from TSPS task SA)
  - Stream 13 Alternative Dispute Resolution (ADR)
  - Stream 14 Health Services (not mandatory)

- Approx. 1400+ pre-qualified suppliers

- Qualified Suppliers must provide a quarterly utilization report (QUR) to remain active in ProServices

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Project Manager (PM) and Contracting Best Practices!

Avoid contacting Suppliers directly

Contact a Contracting Officer from your Department instead

PM Responsibilities:

- Obtain the budget for all phases of the Project
- Determine who will own the Intellectual Property
- Determine the Security Level
- Determine if Aboriginal Businesses should be given preference
- Develop the Statement of Work (SOW) and the evaluation criteria
- Determine with the Contracting Officer if a mandatory Method of Supply (MoS) exists (S.O., S.A. C.S.O: http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12025)

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Project Manager (PM) and Contracting Best Practices! (cont'd)

If a MoS exists:

Compare the required expertise for the requirement with the category descriptions

- If a match is found between the requirement and one or more category(ies), use the appropriate MoS
- Evaluate the Bids received from the pre-qualified suppliers and award the contract accordingly

If no MoS exists:

- The Department may proceed with the purchase of the services under its own Delegated Contracting Authority and procedures

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ProServices

Task Based only	
$0 to $40K	**$0 to CKFTA**
▪ Directed contracting possible by choosing one Contractor amongst the pre-qualified Suppliers for the category ▪ In accordance with the Government Contracts Regulations, clients must document on file why it was not cost effective to go competitive.	▪ Competitive process where departments decide # of pre-qualified Suppliers for the selected category to invite (minimum of 2) to bid. CPSS will randomly select the minimum number of pre-qualified suppliers if not done by the client. ▪ Suppliers must be given a minimum of 5 days to respond to an RFP.

Canada Korea Free Trade Agreement (CKFTA) threshold: currently $100K

What is TSPS ?

Task and Solutions Professional Services

- Mandatory method of supply for **Non-IT** Professional Services to be used by all Departments https://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spcts-tsps-eng.html

- Requirements exceeding the ProServices threshold

- Includes Task Based Task Based and Solution based Supply Arrangements

  - Task based SA has 6 Streams (with a total of 67 categories)

  - Solutions based SA has 5 Streams (no categories)

- Contains approx. 800+ pre-qualified suppliers

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Task based vs. Solution based TSPS (cont'd)

What is the difference between **Task based** and **Solutions based**?

- A task-based requirement is related to a particular service category required to address a specific need and is usually associated with a specified set of responsibilities. A task involves a specific start date, a specific end date, and set deliverables. Tasks are usually not large projects, although they may be subsets of a larger project. Client would determine the number and type of resources required.

- In a solutions-based requirement, a supplier defines and provides a solution to a client's requirement, manages the overall solution, phase or project, and accepts responsibility for the outcome. Supplier would determine number and type of resources required.

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Using CPSS for ProServices

- Log into Client Module : https://sspc-cpss.tpsgc-pwgsc.gc.ca/recherche-search/Indiquerouverturesession-ShowLogin-Eng.action

- Complete client search (select category, region or metropolitan area, security, dollar value, etc.)

- Select supplier(s)

- Print off the necessary pages from CPSS for inclusion in your procurement file

- Complete the RFP process outside CPSS

- Send the RFP to the pre-qualified suppliers selected by your client

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Preparing a Request for Proposal (RFP) What to include? (minimum) - ProServices

- Option: ProServices RFP template for both Directed / Competitive Contract: https://www.gcpedia.gc.ca/wiki/ProServices **or** use the eXpress template

- Authorized user may use the following simplified approach for requesting a Bid (directed contract):

  ➢ Minimum category requirements(level of expertise, region of service delivery, Aboriginal procurement or not):

  ➢ Minimum years of experience for IT categories

  ➢ Flex Grid for Non-IT categories

  ➢ Minimum mandatory criteria requirement for Alternate Dispute Resolution (ADR) and Health Services

  ➢ Common Security Requirement Checklist (SRCL)

  ➢ Statement of Work

  ➢ Standard Clauses and Conditions (2010B) – always use the latest version

  ➢ Resulting Contract Clauses

Before requesting an exemption

Determine if the requirement is subject to the use of any Mandatory Government-Wide Method of Supply (MoS)

- **If no** Mandatory Government-Wide MoS can address your requirement, no exemption from PSPC is necessary. You can proceed with your procurement using your own Departmental Contracting Authority Delegation and procedures

- **If yes,** and it falls under ProServices, you must conduct a search in the Centralized Professional Services System (CPSS) to find all pre-qualified suppliers for the required category(ies)

If required, you send a Request for Information (RFI) to determine if a specific expertise is available within the pre-qualified suppliers under a given category
Please consult the ProServices Exemption Checklist:
https://www.tpsgc-pwgsc.gc.ca/app-acq/sp-ps/lv-cl-eng.html

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Before requesting an exemption (cont'd)

- Using the ProServices simplified RFI* process will result in a timely response from the pre-qualified supplier community to your Client:

  - ➤ **Should a positive response** from the RFI process be received you can proceed with the RFP process for competitive requirements or issue a directed contract (below $40K)** depending on the value of your requirement

  - ➤ **Should no responses** be received from the RFI process, please contact ProServices for review, guidance and possibly an exemption

  - ➤ All important information should be recorded in the procurement file

*RFI template: https://www.tpsgc-pwgsc.gc.ca/app-acq/sp-ps/ddr-rfi-eng.html

** Including all applicable taxes, travel, living expenses and amendments

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Useful Information/links

- **ProServices Website:** http://www.tpsgc-pwgsc.gc.ca/app-acq/sp-ps/index-eng.html

- **ProServices** RFP Templates & more:https://www.gcpedia.gc.ca/wiki/ProServices

- **Hyperlink for Methods of Supply on GCPedia :** **https://www.gcpedia.gc.ca/wiki/Methods_of_Supply**

- **Contact for CPSS:** sspc.cpss@pwgsc.gc.ca

- **Standing Offer - Task based**

- **Supply Arrangement - Task based**

- **Supply Arrangement - Solutions based**

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ProServices & TSPS
Contact Information

ProServices Email: **tpsgc.proservices.pwgsc@tpsgc-pwgsc.gc.ca**

Telephone Number: **(613) 858-7568**

TSPS Email: **tpsgc.spts-tsps.pwgsc@tpsgc-pwgsc.gc.ca**

Telephone Number: **(613) 858-8761**