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**CANADIANS.**

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au service des  
**CANADIENS.**

# ProServices Professional Services

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Procurement Systems

Business and Technology Solutions Sector (BTSS)

March 2022

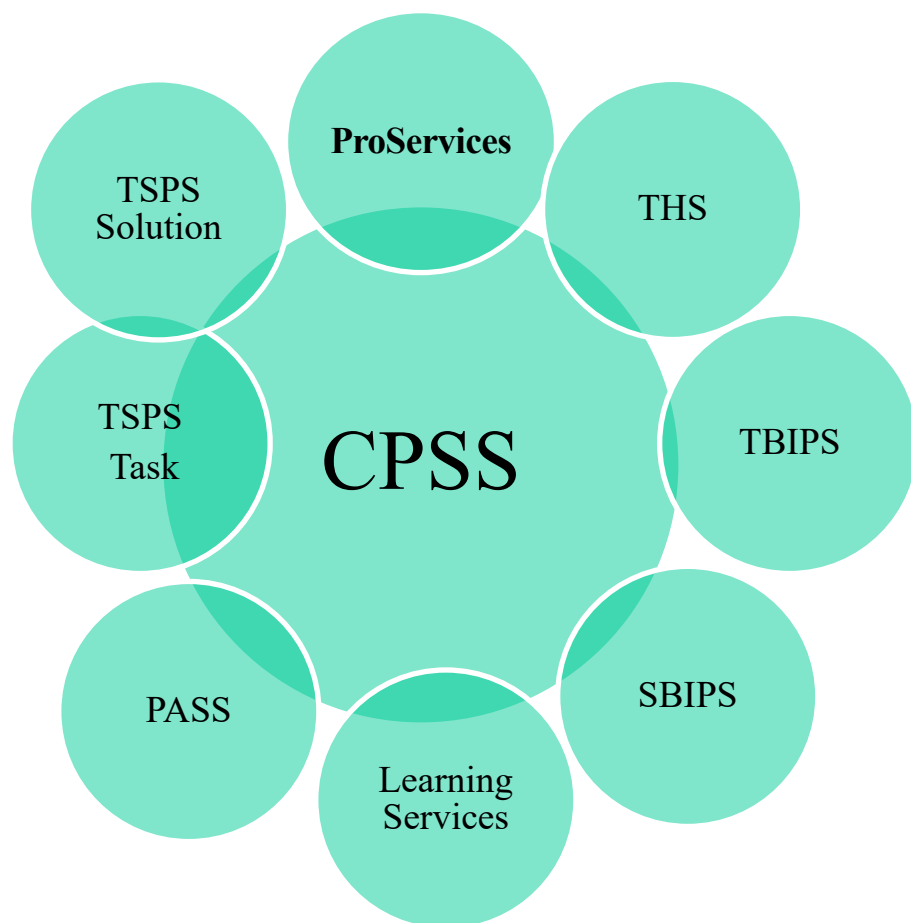


Public Services and  
Procurement Canada

Services publics et  
Approvisionnement Canada

Canada

# Overview: Methods of Supply (MoS)



- **ProServices** IT and non-IT related
- **TSPS** Tasks and Solutions Professional Services  
(SA 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>

# What is ProServices ?

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- 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\*) expires Dec 31, 2023
- 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



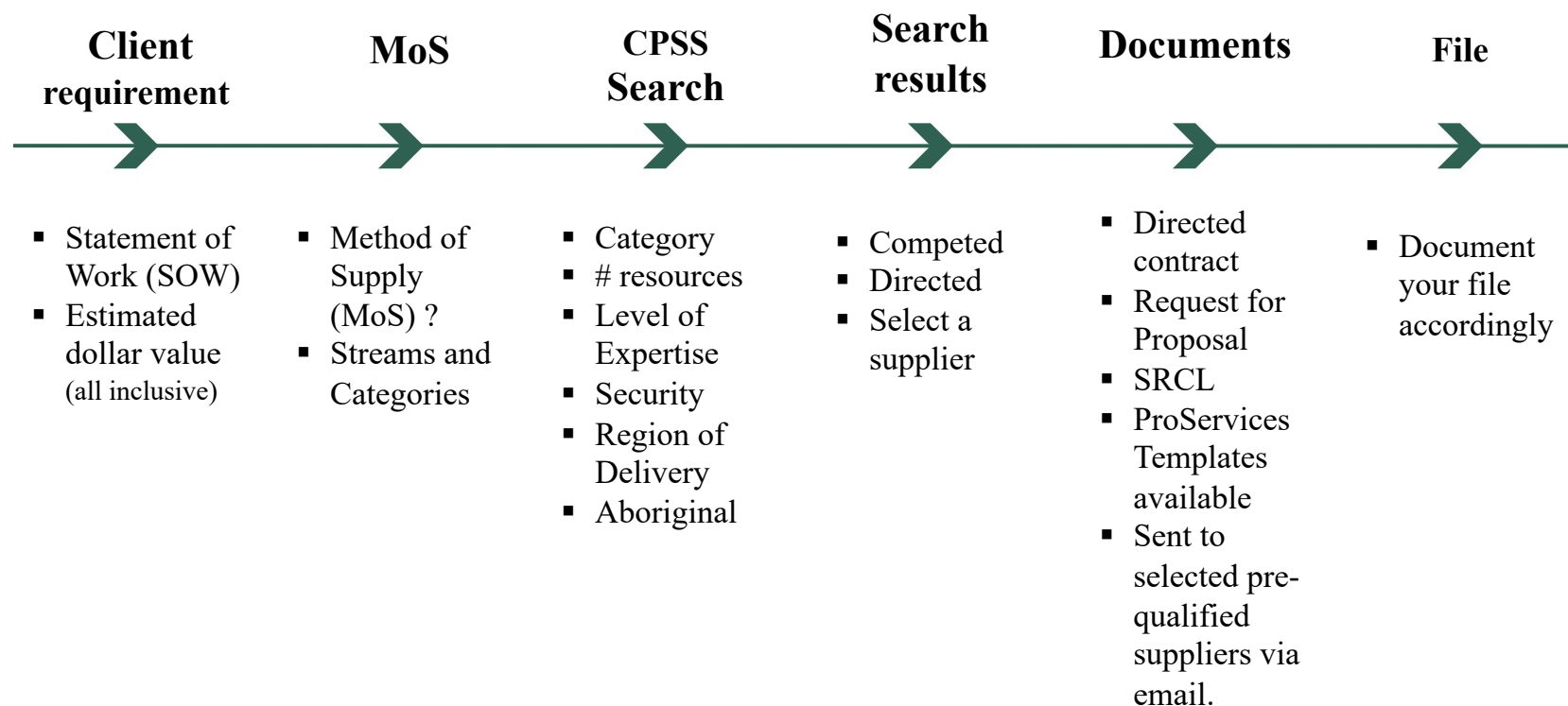
# What is ProServices ? (cont'd)

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- 14 Streams (166 categories)
  - Stream 1 – 7 for Information Technology (**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. 1600+ pre-qualified suppliers
- Qualified suppliers must provide a quarterly utilization report (QUR) to remain active in ProServices
- Refresh opportunity for the Suppliers to qualify is issued on a quarterly basis



# ProServices process



# Project Manager (PM) and Contracting Best Practices!

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**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>)



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

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## 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



# What is TSPS ?

## Task and Solutions Professional Services

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- 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>
- Supply Arrangements (task and solution based)
- Task based has 6 Streams (with a total of 67 categories) \*\*note that Stream 6 (Health Services) is not mandatory
- Solutions based has 5 Streams (no categories)
- Contains 600+ pre-qualified suppliers
- Pre-qualified Suppliers must provide a QUR to remain active in TSPS
- Refresh opportunity for the Suppliers to qualify is issued on a quarterly basis





# What is TSPS ? (cont'd)

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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. **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.**



# Common Rules – At a Glance

## Harmonized Business rules for MoS

## Supply Arrangements

| MoS                                | SA                  | SA                    | SA                        | SA                      |
|------------------------------------|---------------------|-----------------------|---------------------------|-------------------------|
|                                    | 0-40K<br>(directed) | 0-CKFTA<br>(competed) | CKFTA-<br>3,75M<br>Tier 1 | Over<br>3,75M<br>Tier 2 |
| ProServices                        | √                   | √                     |                           |                         |
| TBIPS                              |                     |                       | √                         | √                       |
| SBIPS (sol)                        | √                   | √                     | √                         | √                       |
| TSPS (task)                        |                     |                       | √                         | √                       |
| TSPS (sol)                         | √                   | √                     | √                         | √                       |
| PASS-SA                            | √                   | √                     | √                         | √                       |
| Learning Services                  | √                   | √                     | √                         | √                       |
|                                    |                     |                       |                           |                         |
| Rules                              | SA                  | SA                    | SA                        | SA                      |
|                                    | 0-40K<br>(directed) | 0-CKFTA<br>(comp)     | CKFTA-<br>3,75M<br>Tier 1 | Over<br>3,75M<br>Tier 2 |
| Min. # of Suppliers to invite      | 1                   | 2                     | 15                        | All                     |
| Min. Supplier response time (days) | 0                   | 5                     | 15                        | 20                      |



# ProServices

## Task Based only

\$0 to \$40K

- 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.

\$0 to CKFTA

- 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 (all inclusive)



# TSPS

| Task Based   | Solution Based   |
|--|--|
| Supply Arrangement (SA)  | Supply Arrangement (SA)  |
| <p><b>Tier 1</b> (CKFTA to \$3.75M)<br/>competitive process where clients invite a minimum of 15 pre-qualified suppliers. CPSS will randomly select the minimum required, if not done by the client.</p> <p><b>Tier 2</b> (over \$3.75M) competitive process where clients invite all pre-qualified suppliers</p> <p>A Notice of Proposed Procurement (NPP) must be posted on Buy and Sell simultaneously.</p> | <p><b>Tier 1</b> (\$0 to \$40K):<br/>Clients may direct a contract to a pre-qualified supplier who appears on the Centralized Professional Services System (CPSS) search results.</p> <p><b>Tier 1</b> (0 to CKFTA): client can invite a minimum of 2 pre-qualified suppliers*</p> <p><b>Tier 1</b> (CKFTA to \$3.75M): clients must invite a minimum of 15 pre-qualified suppliers *</p> <p><b>Tier 2</b> (over \$3.75M): clients must invite all pre-qualified suppliers</p> <p>CPSS will randomly select the minimum required, if not done by the client.</p> <p>A Notice of Proposed Procurement (NPP) must be posted on Buy and Sell simultaneously for any requirements at or above CKFTA.</p> |

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



# Summary

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## **< \$100K ProServices (IT and Non-IT)**

14 Streams / 166 Categories

1600+ pre-q suppliers

## **TBIPS (IT) ≥ \$100K**

7 Streams / 93 Categories

400+ pre-q suppliers

## **TSPS (Non-IT) ≥ \$100K**

6 Streams / 67 Categories

600+ pre-q suppliers



# Using CPSS for ProServices

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- Log into Client Module : <https://sspc-cpss.tpsgc-pwgsc.gc.ca/recherche-search/Indiquerouvertureession-ShowLogin-Eng.action>
- Complete client search (select category, region or metropolitan area, security, dollar value, etc.)
- Select supplier(s)
- Save your CPSS search results for your procurement file
- Complete the RFP process outside CPSS
- Send the RFP to the pre-qualified suppliers selected by your client (ProServices)
- Publish a Notice of Proposed Procurement on Buy and Sell with the list of selected pre-qualified suppliers, if applicable.



# Preparing a Request for Proposal (RFP)

## What to include? (minimum) - ProServices

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Option: ProServices RFP template for a Competitive Contract:  
<https://www.gcpedia.gc.ca/wiki/ProServices> or use the eXpress template for either a directed or competitive contract

– Please consult our GCPedia page for the latest version

Authorized user may also use the following [simplified approach](#) for requesting a Bid (directed contract):

- Minimum category requirements
- Common Security Requirement Checklist (SRCL)
- Statement of Work
- Standard Clauses and Conditions (2010B) – always use the latest version
- Resulting Contract Clauses



# Minimum requirements

- Minimum category requirements:
  - Minimum years of experience for IT categories
  - Flex Grid for Non-IT categories
  - Minimum category requirement for Alternate Dispute Resolution (ADR) and Health Services

| Streams 1 to 7 (IT)   | Stream 8 to 12 (non-IT)                     | Streams 13 & 14   |
|---|---|---|
| <b>Experience levels</b><br>1- Junior<br>2- Intermediate<br>3 -Senior | <b>Flexible Grid</b><br><br>( see category) | <b>Minimum<br/>Mandatory<br/>Criteria</b><br><br>(see category) |





# Requesting an exemption

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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 or other MoS, you must conduct a search in the Centralized Professional Services System (CPSS) to find all pre-qualified suppliers for the required category(ies)
  - A Request for Information (RFI) is sent to all pre-qualified suppliers to seek whether the expertise/experience you are seeking exists amongst your CPSS search results list.
- Please consult the ProServices Exemption Checklist: <https://www.tpsgc-pwgsc.gc.ca/app-acq/sp-ps/lv-cl-eng.html>



# Before requesting an exemption

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- Using a 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



# Useful Information/links

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- **ProServices Website:** <http://www.tpsgc-pwgsc.gc.ca/app-acq/sp-ps/index-eng.html>
- **ProServices RFP Templates**  
<https://www.gcpedia.gc.ca/wiki/ProServices>
- **Hyperlink for Methods of Supply on GCPedia :**  
[https://www.gcpedia.gc.ca/wiki/Methods\\_of\\_Supply](https://www.gcpedia.gc.ca/wiki/Methods_of_Supply)
- **Contact for CPSS:** [sspc.cpss@pwgsc.gc.ca](mailto:sspc.cpss@pwgsc.gc.ca)
- **Supply Arrangement - Task based**
- **Supply Arrangement - Solutions based**



# ProServices & TSPS

## Contact Information

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ProServices Email: [tpsgc.proservices.pwgsc@tpsgc-pwgsc.gc.ca](mailto:tpsgc.proservices.pwgsc@tpsgc-pwgsc.gc.ca)

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

TSPS Email: [tpsgc.spts-tsps.pwgsc@tpsgc-pwgsc.gc.ca](mailto:tpsgc.spts-tsps.pwgsc@tpsgc-pwgsc.gc.ca)

Telephone Number: **(613) 355-1986**



# Questions / Comments / Feedback

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