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**Capacity on Demand – Wave 4 Process**

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# Document Approvers

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# Purpose

This document describes the process to leverage the Capacity on Demand Wave 4 contracts for **Business Services** and **Project Management Services** to address specific Informatics Technology needs and is associated with a specific set of activities and deliverables.

The Capacity on Demand Wave 4 process is to be used by clients who require Informatics Technology professional services to support the delivery of projects for the department.

***Summary***

*What is Capacity on Demand W4 (COD W4)?*

In an effort to satisfy an ongoing departmental need for Informatics Technology professional services to support various initiatives the Chief Financial Officer Branch (CFOB) has awarded various task-based contracts (via PSPC as the Contracting Authority) for the following streams:

* + - Business Services
    - Project Management Services

The contracts are structured as **task-based** where a Task Authorization (TA) is issued to various contractors.

The TA will identify the category of resource required, level of effort, per Diem rates and the work to be completed.

*Vendor list and per diem rate*



*Who can use COD W4?*

Clients who require various Informatics Technology (IT) professional services to support the delivery of projects for the department.

The COD W4 contracts were awarded using [Task-Based Informatics Professional Services (TBIPS)](http://www.tpsgc-pwgsc.gc.ca/app-acq/sptb-tbps/index-eng.html). The TA leveraged against theses COD contracts **should be related to a particular activity required to address a specific IT need or linked to an IT enabled project.**

If you are uncertain about whether your work is suited for the COD W4 contracts please contact the *COD Triage team*.

*Contact COD Triage Team*

[NC-COD-CALD-GD@hrsdc-rhdcc.gc.ca](mailto:NC-COD-CALD-GD%20%3cNC-COD-CALD-GD@hrsdc-rhdcc.gc.ca%3e)

***Roles and Responsibilities:***

*Client*

* + Defines requirement;
  + Works with the *Procurement Planning and Advisory Services* team on a Project Procurement Plan (where applicable);
  + Completes Draft Task Authorization form (DTA);
  + Project Authority Signs DTA form;
  + Sends DTA form and Project Procurement Plan (where applicable) to   
    *COD Triage Team;*
  + Client evaluates proposed resource submitted by the *Triage Team;*
  + Client notifies Triage Team that resource was accepted;
  + Upon *Triage Team* approval, Client submits Purchase Requisition with completed evaluation grids, CV, DTA Form and Procurement Plan (where applicable) to Procurement via myEMS (SAP);
  + Manages TA;
  + Closes-out TA;
  + Identifies needs for amendments in a timely fashion (where applicable), including changes of resources;
  + Completes service entry sheet (SES) and pays invoices in myEMS (SAP).

*Procurement Planning and Advisory Services*

* + Procurement Planning and Advisory Services team works with client to create or amend the Project Procurement Plan;
  + Approves Project Procurement Plans;
  + Provides copy of CFOB approved Project Procurement Plan to client.

*COD Triage Team*

* + Reviews Draft Task Authorization form and verifies that the information provided by the client is appropriate and can be supported by COD W4 Contracts;
  + Obtains approval from the Enterprise Project Management Office within the Investment, Procurement and Project Management directorate for requirements under the Project Management Services stream;
  + Obtains approval from the Transformation and Integrated Service Management Branch for requirements under the Business Services stream;
  + If it is determined that the COD W4 is the appropriate method of supply,   
    *Triage Team* signs the DTA;
  + Advises client, by email, that the request has been approved – or denied;
  + Contacts vendor for CVs and Security Information;
  + Route CVs from Contractor to Client and liaise between Client and Contractor as needed;
  + Tracks usage against parent-contract(s);
  + Ensures distribution of work satisfies the obligations in the contracts.

*ESDC Procurement Officer*

* + Reviews Task Authorization to ensure appropriate legal contract language and security;
  + Actions TA in myEMS (SAP) via a Purchase Requisition from the client;
  + Issues TAs to Contractor for signature;
  + Provides copy of signed TA to client;
  + Actions amendments upon request from client via a Purchase Requisition;
  + Provides copies of the TA issued by ESDC to *Triage Team* and PSPC.

*Contractor*

* + Provides CVs and Signed Certifications upon request, within the timelines given by *Triage Team;*
  + Reviews TA and returns signed copy to Procurement (within 2 business days);
  + Performs work in accordance with the TA;
  + Provides replacement resources as required;
  + Complies with rules and regulations of the contract.

*Public Services and Procurement Canada (PSPC)*

* + Monitors burn rates of each contract;
  + Actions amendments to the contracts;
  + Issues TA’s over 400k (excluding taxes) to the contractors;
  + Monitors “no response’ trends.

***Step-by-Step Process***

|  |  |  |  |
| --- | --- | --- | --- |
| **Step**  **#** | **ACTIVITY** | **Responsibility** | **Tool** |
| 1  2 | Client defines requirement and determines if a new or amended Project Procurement Plan is required.  If a Project Procurement Plan is required then client works with *Procurement Planning and Advisory Services* at the following  General Email Box: [NC-PPAS-PASC-GD](mailto:NC-PPAS-PASC-GD@hrdc-drhc.net). | Client  Procurement Planning and Advisory Services | Statement of Work  Project Procurement Plan |
| 3 | Client submits Draft TA form and Project Procurement Plan (if need be) to the  *COD Triage Team* at the following General Email Box for review:  [NC-COD-CALD-GD](mailto:NC-COD-CALD-GD%20%3cNC-COD-CALD-GD@hrsdc-rhdcc.gc.ca) | Client | Email |
| 4 | *COD Triage Team* reviews the Draft TA form submitted by the client and determines if the COD W4 is the appropriate method of supply. | COD  Triage Team | Draft TA form |
| 5 | To ensure that capacity for particular resources does not already exist in the department, *COD Triage Team* will send the Draft TA form to:   1. The Enterprise Project Management Office, within the Investment, Procurement and Project Management directorate, for requirements under the Project Management Services Stream.      1. The Transformation group in the Transformation and Integrated Service Management Branch, for requirements under the Business Service Stream. | COD Triage Team | Email |
| 6 | If COD W4 is the appropriate method of supply and upon approval from step 5, *COD Triage Team* will advise the client by email. | COD Triage Team | Email |
| 7 | *COD Triage Team* will contact contractor and ask for:   1. CV(s); 2. Signed certification(s) (Appendix D to Annex A); 3. Security File # and expiry date; 4. Date of Birth. | COD Triage Team | Email |
| 8 | Contractor provides requested documents to *COD Triage Team* within the specified time frame. | Contractor | Email |
| 9 | *COD Triage Team* sends the signed Draft TA form and resource information to the client. | COD Triage Team | Email |
| 10 | Client evaluates CV(s) using evaluation grids provided. | Client | Evaluation Grid |
| 11 | Client notifies *COD Triage Team* that resource was accepted. | Client | Email |
| 12 | Client submits a Purchase Requisition (PREQ) to Procurement via myEMS (SAP)  Client to ensure that the following information is included in the PREQ:   * Header Text reference  “COD W4 Contract” and name of the contractor to be used * Approved draft TA form * Signed certification:  Appendix D to Annex A  (for the successful resource only) * CV * Completed and signed evaluation grid (for the successful resource only) * Security Information (i.e. Date of birth, PSPC file #) * CFOB approved or amended Procurement Plan, if applicable. | Client | myEMS (SAP) |
| 13 | ESDC Procurement Officer will review the approved Draft TA and supporting documentation.  Once documentation provided by the client is complete and in order, a TA will be issued.  A TA will be issued to the contractor with a copy (cc) to the client **and** *COD Triage Team.* | Procurement | TA |
| 14 | Contractor signs the TA and sends back to ESDC Procurement Officer by replying all. | Contractor | TA |
| 15 | ESDC Procurement Officer ensures that a copy of the signed TA went to the client and to the *COD Triage Team* for tracking purposes. | Procurement | TA |
| 16 | *COD Triage Team* tracks usage against contracts to ensure that the work is being evenly distributed, as per the terms of the contract. | COD Triage Team | Excel |
| 17 | Client manages TA:   * Tracks completion of deliverables and manages burn rate. * Requests amendments in a timely manner as required. | Client | TA and myEMS(SAP) |

***Documents***

## Draft Task Authorization



## Certifications at the TA Stage (Appendix D to Annex A)



***Evaluation Grids and Tasks-Deliverables***

*Project Management Services*

|  |  |  |
| --- | --- | --- |
| **Project Management Services** | **Evaluation Grids** | **Tasks and Deliverables** |
| **Change Management Level 3** |  |  |
| **Project Executive**  **Level 3** |  |  |
| **Project Manager**  **Level 3** |  |  |
| **Project Manager - Release Manager Level 3** |  |  |
| **Project Scheduler**  **Level 3** |  |  |
| **Risk Management** [**Specialist**](https://www.tpsgc-pwgsc.gc.ca/app-acq/sptb-tbps/gestiondeprojets-projectmanagement-eng.html#p12)  **Level 3** |  |  |

*Business Services*

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| --- | --- | --- |
| **Business Services** | **Evaluation Grids** | **Tasks and Deliverables** |
| **Business Analyst**  **Level 3** |  |  |
| **Business Architect**  **Level 3** |  |  |
| **Business Continuity / Disaster Recovery Specialist**  [**Level**](https://www.tpsgc-pwgsc.gc.ca/app-acq/sptb-tbps/entreprise-business-eng.html#b4) **3** |  |  |
| **Business Process Reengineer**  **Level 3** |  |  |
| **Business Transformation Architect**  **Level 3** |  |  |
| **Technical Writer**  **Level 3** |  |  |