Digital services contracting questionnaire

Form completion time estimate: 5 to 8 minutes

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# Requirement

As set out in the [*Mandatory Procedures on Digital Talent*](https://www.tbs-sct.canada.ca/pol/doc-eng.aspx?id=32749&section=procedure&p=A), the business owner is responsible for completing and submitting the Digital Services Contracting Questionnaire if they are procuring digital services.

Prior to concluding that a shortage of available or qualified digital talent is the primary rationale for procurement, the business owner must confirm with the Office of the Chief Information Officer of Canada (OCIO), using the [GC Digital Talent Platform](https://talent.canada.ca/en/search), that there is no available pre‑qualified talent in an OCIO-‑coordinated talent pool that could meet the need in the timeframe provided.

The completed questionnaire needs to be submitted at the time when a procurement for digital talent or IT‑related services (including contracts, amendments and task authorizations that exceeds $40,000, in alignment with the [*Mandatory Procedures for Business Owners When Procuring Professional Service*](https://www.tbs-sct.canada.ca/pol/doc-eng.aspx?id=32692&section=procedure&p=F)) is submitted to contracting authority for processing.

This is a reporting requirement only and does not impose any additional approval steps by OCIO. In other words, no OCIO approval is required to initiate a procurement process for digital services.

For examples of where this requirement applies, go to the [“Contracts for digital services” section.](#_Examples_of_contracts_1)

# Instructions

Complete and submit the questionnaire to the GCTalentGC@tbs‑sct.gc.ca mailbox at the time when a procurement for digital services is submitted to contracting authority for processing.

All questions in this questionnaire are required unless otherwise specified.

For any questions or concerns regarding the questionnaire, contact GCTalentGC@tbs‑sct.gc.ca for more information.

# Questionnaire

## General information

|  |  |
| --- | --- |
| **Department or agency** | Enter name of department or agency |
| **Branch** | Enter name of branch |
| **Business owner** (As defined in the [Policy on the Planning and Management of Investments](https://www.tbs-sct.canada.ca/pol/doc-eng.aspx?id=32593)) | Enter name of business ownerEnter job title of business ownerEnter email of business owner |
| **Delegated financial authority (section 32) for the procurement** | Enter name of delegated financial authorityEnter job title of delegated financial authorityEnter email of delegated financial authority |

### Other authority involved or engaged on this procurement process

(Check the applicable box.)

| **Authority** | **Involved or engaged**  |
| --- | --- |
| HR |[ ]
| Procurement |[ ]
| Finance |[ ]
| Labour relations |[ ]
| Other: Specify the other authority here |[ ]
| No other authority is involved |[ ]

### Information about the procurement

|  |  |
| --- | --- |
| **Contract title** | Enter title of the contract |
| **Solicitation number** (if available) | Enter solicitation number |
| **Expected start date of contract** | YYYY-MM-DD |
| **Expected end date of contract** | YYYY-MM-DD |
| **Type of procurement** | Choose an option |

## Rationale for procurement

### Shortage of available or qualified talent

#### Is talent shortage the primary rationale for this procurement process?

Choose an option

If “yes”, the [Directive on Digital Talent](https://www.tbs-sct.canada.ca/pol/doc-eng.aspx?id=32749) requires that the manager or the delegated authority to confirm there is no available pre-qualified talent in OCIO-coordinated talent pools that could meet the need in the timeframe provided. This confirmation can be done through a talent search on the [GC Digital Talent Platform](https://talent.canada.ca/search).

Each talent search will generate a tracking number. Record the tracking number in table 3.3 Personnel requirements.

### Requirement cannot be met through staffing (for reason other than talent shortage)

#### Is this procurement being initiated because the requirement cannot be met through staffing?

Choose an option

#### If “yes”, has departmental human resource (HR) advisors been engaged on this procurement?

Choose an option

##### If “yes”, provide the name of the HR advisor or the generic mailbox that has been engaged. Ensure the engagement is documented to support the procurement file.

Enter name of the HR advisor or the generic mailbox

##### If “no”, the [Mandatory Procedures for Business Owners When Procuring Professional Service](https://www.tbs-sct.canada.ca/pol/doc-eng.aspx?id=32692&section=procedure&p=F) requires that, where a procurement of professional services does not align with a resourcing strategy or plan approved by the Head of Human Resource, the business owner is required to consult with departmental human resource advisors to confirm that the requirements cannot be met through staffing.

#### If this procurement is being initiated because the requirement cannot be met through staffing, indicate the rationale by choosing the applicable option below.

| **Rationale** | **Selection** |
| --- | --- |
| Unable to create new indeterminate positions in the required timeframe. |[ ]
| Unable to create new term positions in the required timeframe. |[ ]
| Unable to create position in the required group due to classification restriction. |[ ]
| Only bilingual positions are available, but the work is unilingual. |[ ]
| The work does not justify a full FTE (full-time equivalent). | ☐ |
| Staffing freeze in place. |[ ]
| The department has already maximized the staff complement that is allowed. |[ ]
| Other: Specify the other HR rationale here |[ ]

### Lack of salary funding

#### Is this procurement being initiated because there is a lack of salary funding?

Choose an option.

#### If “yes”, has the appropriate departmental finance organization been engaged on this procurement?

Choose an option.

##### If “yes”, provide the name of the departmental finance organization or the generic mailbox that provided the confirmation. Ensure the engagement is documented to support the procurement file.

Enter the name or generic mailbox of the finance organization

##### If “no”, the [Mandatory Procedures for Business Owners When Procuring Professional Service](https://www.tbs-sct.canada.ca/pol/doc-eng.aspx?id=32692&section=procedure&p=F) requires the business owner to obtain and document confirmation from the appropriate departmental finance organization that there is an inability to convert operational budget dollars into salary dollars.

### Other rationale

If “no” is chosen for 2.1.1, 2.2.1, and 2.3.1, indicate in the table below the primary rationale for this procurement process.

| **Rationale** | **Selection** |
| --- | --- |
| The funding has been secured on a cost recovery basis. |[ ]
| Timing requirements |[ ]
| Independent, non‑GC authority required (for example, independent service review) |[ ]
| Intellectual property factors (for example, proprietary software) |[ ]
| Management decision |[ ]
| Other: Specify the other rationale here |[ ]

## Resource Requirement

### Method of supply

Select the method of supply for this procurement process.

Choose an option

If “Other” is chosen, specify method of supply here.

If the method of supply is solutions-based (e.g., SBIPS), complete table 3.2 Solutions requirements.

If the method of supply is task-based (e.g., TBIPS, ProServices, THS) or the procurement has specific personnel requirements, complete table 3.3 Personnel requirements.

### Solution requirements (for solution-based method of supply)

Provide information on the solution required, using the streams and categories of the selected method of supply. Add more rows as needed.

Streams and Categories:

* [Solutions-Based Informatics Professional Services (SBIPS) - Domains of Expertise](https://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spicsdc-sbipsde-eng.html)
* [Task and solutions professional services: Streams and categories](https://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spctscc-tspscc-eng.html)

| **Domain of Expertise** | **Official language requirement** | **Security level** | **Brief description of requirements**(In 200 words or less, describe the solution required) |
| --- | --- | --- | --- |
| *Example:****Business Transformation*** | *Example:****English only*** | *Example:****Reliability*** | *Example:****Develop an online submission process for grants application*** |
| Enter domain of expertise | Choose OL requirement | Choose security level | Briefly describe the solution required |

### Personnel requirements (for task-based method of supply)

Provide information on each category of personnel required under the contract, using the streams and categories of the selected method of supply. Add more rows as needed.

Streams and Categories:

* [Task-based informatics professional service (TBIPS): Streams and categories](https://www.tpsgc-pwgsc.gc.ca/app-acq/sptb-tbps/categories-eng.html)
* [ProServices: Streams and categories](https://www.tpsgc-pwgsc.gc.ca/app-acq/sp-ps/vltcat-strmcat-eng.html)
* [Temporary Help Services for the National Capital Area (THS): Streams and categories](https://www.tpsgc-pwgsc.gc.ca/app-acq/sat-ths/sat-thc-26112018-eng.html#sv5)
* [Task and solutions professional services: Streams and categories](https://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spctscc-tspscc-eng.html)

| **Category of resource** | **Level of expertise** | **Specialties required** | **Official language (OL) requirement** | **Security level** | **Telework allowed** | **Number of resources** | [**GC Digital Talent search**](https://talent.canada.ca/search) **tracking number** (required if talent shortage is the primary rationale for procurement) |
| --- | --- | --- | --- | --- | --- | --- | --- |
| *Example:* ***A.1. Application/ Software Architect*** | *Example:****Level 3 / Senior*** | *Example:****.Net******M365*** | *Example:****English only*** | *Example:***Secret** | *Example:****Fully remote - telework all the time*** | *Example:****3*** | *Example:****4a2ddfa2-ef60-46ba-8fab-6ad097859978*** |
| Enter category of resource | Choose level of expertise | Enter any specialties required | Choose OL requirement | Choose security level | Choose telework permission | Number of resources required | Enter tracking number |
| Enter category of resource | Choose level of expertise | Enter any specialties required | Choose OL requirement | Choose security level | Choose telework permission | Number of resources required | Enter tracking number |
| Enter category of resource | Choose level of expertise | Enter any specialties required | Choose OL requirement | Choose security level | Choose telework permission | Number of resources required | Enter tracking number |

## Technological change

### Is the work being contracted out because it involves the introduction of:

* equipment or material of a substantially different nature than that previously utilized;
* a major change in your department’s operation directly related to the introduction of that equipment or material;
* a new technological system, software or hardware of a substantially different nature than that previously utilized; or
* a technological change to a system, software or hardware of a substantially different nature than that previously utilized

Select “yes” if any of the above apply.

Choose an option

## Knowledge transfer

### Will there be an ongoing need for the knowledge or skill sets in the work unit for which the contractor is being engaged?

Choose an option

### Has knowledge transfer from the contractor to the government work unit been built into the contract?

Choose an option

### Will employees have access to training and development for the knowledge or skill sets required in the contract?

Choose an option

### Has OCIO been engaged on connecting employees to training and development opportunities related to the requirements in this contract, if appropriate?

Choose an option

End of questionnaire

# Examples of contracts for digital services

For the purpose of this requirement, contracts for digital services include any contract, regardless of procurement type or solicitation procedure, that supports the development or delivery of GC digital initiatives, products or services, such as contracts that are for:

* information technology
* information management
* cybersecurity
* data management for the development or delivery of a GC digital initiative, service or product
* data science and analytics for the development or delivery of a GC digital initiative, service or product
* user‑experience research or service design for the development or delivery of a GC digital initiative, service or product

Examples of these contracts may include, but are not limited to:

* professional services contract for cyber security assessment
* a sole source contract for a consulting firm to conduct user research on a digital product
* a supply arrangement for a supplier to build a digital application
* a contract bringing in consultants to conduct service design for a digital service
* a competitive contract to bring in multiple software developers for surge capacity
* an amendment or extension to a contract for software testing

If there is uncertainty on whether this questionnaire is required for a specific type of contract, contact GCTalentGC@tbs‑sct.gc.ca for more information.

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