

RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:

**Bid Receiving Public Works and Government
Services Canada/Réception des soumissions
Travaux publics et Services gouvernementaux
Canada**

Pacific Region

401 - 1230 Government Street

Victoria, B.C.

V8W 3X4

Bid Fax: (250) 363-3344

Request For a Standing Offer Demande d'offre à commandes

Regional Individual Standing Offer (RISO)

Offre à commandes individuelle régionale (OCIR)

Canada, as represented by the Minister of Public Works and Government Services Canada, hereby requests a Standing Offer on behalf of the Identified Users herein.

Le Canada, représenté par le ministre des Travaux Publics et Services Gouvernementaux Canada, autorise par la présente, une offre à commandes au nom des utilisateurs identifiés énumérés ci-après.

Comments - Commentaires

Vendor/Firm Name and Address

Raison sociale et adresse du fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution

Public Works and Government Services Canada - Pacific Region

401 - 1230 Government Street

Victoria, B. C.

V8W 3X4

| | |
|---|--|
| Title - Sujet RISO PM TRAINING | |
| Solicitation No. - N° de l'invitation W0103-136600/A | Date 2013-05-07 |
| Client Reference No. - N° de référence du client W0103-136600 | GETS Ref. No. - N° de réf. de SEAG PW-\$VIC-211-6230 |
| File No. - N° de dossier VIC-2-35268 (211) | CCC No./N° CCC - FMS No./N° VME |
| Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2013-06-18 | Time Zone Fuseau horaire Pacific Daylight Saving Time PDT |
| Delivery Required - Livraison exigée See Herein | |
| Address Enquiries to: - Adresser toutes questions à: Park, Isabell | Buyer Id - Id de l'acheteur vic211 |
| Telephone No. - N° de téléphone (250)363-3981 () | FAX No. - N° de FAX (250)363-3344 |
| Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: DEPARTMENT OF NATIONAL DEFENCE CFB ESQUIMALT STN FORCES P.O.BOX 17000 LEARNING AND CARER RENTRE VICTORIA British Columbia V9A7N2 Canada | |
| Security - Sécurité This request for a Standing Offer does not include provisions for security. Cette Demande d'offre à commandes ne comprend pas des dispositions en matière de sécurité. | |

Instructions: See Herein

Instructions: Voir aux présentes

| | |
|--|------|
| Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur | |
| Telephone No. - N° de téléphone Facsimile No. - N° de télécopieur | |
| Name and title of person authorized to sign on behalf of Vendor/Firm (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie) | |
| Signature | Date |

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Solicitation No. - N° de l'invitation

W0103-136600/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

vic211

Client Ref. No. - N° de réf. du client

File No. - N° du dossier

CCC No./N° CCC - FMS No/ N° VME

W0103-136600

VIC-2-35268

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PART 1 - GENERAL INFORMATION

1. Introduction

The Request for Standing Offers (RFSO) is divided into seven parts plus attachments and annexes, as follows:

- | | |
|--------|---|
| Part 1 | General Information: provides a general description of the requirement; |
| Part 2 | Offeror Instructions: provides the instructions applicable to the clauses and conditions of the RFSO; |
| Part 3 | Offer Preparation Instructions: provides offerors with instructions on how to prepare their offer to address the evaluation criteria specified; |
| Part 4 | Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria which must be addressed in the offer, and the basis of selection; |
| Part 5 | Certifications: includes the certifications to be provided; |
| Part 6 | 6A, Standing Offer, and 6B, Resulting Contract Clauses: |
| | 6A, includes the Standing Offer containing the offer from the Offeror and the applicable clauses and conditions; |
| | 6B, includes the clauses and conditions which will apply to any contract resulting from a call-up made pursuant to the Standing Offer. |

The Annexes include the Statement of Work, the Basis of Payment and any other annexes.

2. Summary

To provide comprehensive commercial off the shelf (COTS) Project Management training and other related services on an as and when requested basis for the Department of National Defence in Vancouver Island and Greater Vancouver area. Period of the Standing offer is two (2) years with an option to renew for another two (2) years.

Trainings requested are:

- i) Introduction to Project Management
- ii) Project Management
- iii) Project Risk Management
- iv) Scheduling & Cost Control
- v) Quality Management in Projects
- vi) Scope Management in Projects
- vii) Managing Multiple Portfolios

3. Debriefings

Offerors may request a debriefing on the results of the request for standing offers process. Offerors should make the request to the Standing Offer Authority within 15 working days of receipt of the results of the request for standing offers process. The debriefing may be in writing, by telephone or in person.

PART 2 - OFFEROR INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the Request for Standing Offers (RFSO) by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

Offerors who submit an offer agree to be bound by the instructions, clauses and conditions of the RFSO and accept the clauses and conditions of the Standing Offer and resulting contract(s).

The 2006 (2013-03-21) Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the RFSO.

2. Submission of Offers

Offers must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated on page 1 of the Request for Standing Offers.

3. Former Public Servant – Competitive Requirements

Contracts with former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts with FPS, offerors must provide the information required below.

Definitions

For the purposes of this clause,

"former public servant" is any former member of a department as defined in the *Financial Administration Act* R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

- a. an individual;
- b. an individual who has incorporated;
- c. a partnership made of former public servants; or
- d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"pension" means a pension or annual allowance paid under the *Public Service Superannuation Act* (PSSA), R.S., 1985, c. P-36, and any increases paid pursuant to the *Supplementary Retirement Benefits Act*, R.S., 1985, c. S-24 as it affects the PSSA. It does not include pensions payable pursuant to the *Canadian Forces Superannuation Act*, R.S., 1985, c. C-17, the *Defence Services Pension Continuation Act*, 1970, c. D-3, the *Royal Canadian Mounted Police Pension Continuation Act*, 1970, c. R-10, and the *Royal Canadian Mounted Police Superannuation Act*, R.S., 1985, c. R-11, the *Members of Parliament Retiring Allowances Act*, R.S. 1985, c. M-5, and that portion of pension payable to the *Canada Pension Plan Act*, R.S., 1985, c. C-8.

Former Public Servant in Receipt of a Pension

As per the above definitions, is the Offeror a FPS in receipt of a pension? YES () NO ()

If so, the Offeror must provide the following information, for all FPS in receipt of a pension, as applicable:

- a. name of former public servant;
- b. date of termination of employment or retirement from the Public Service.

By providing this information, Offerors agree that the successful Offeror's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with Contracting Policy Notice: 2012-2 and the Guidelines on the Proactive Disclosure of Contracts.

Work Force Reduction Program

Is the Offeror a FPS who received a lump sum payment pursuant to the terms of a work force reduction program? **YES () NO ()**

If so, the Offeror must provide the following information:

- a. name of former public servant;
- b. conditions of the lump sum payment incentive;
- c. date of termination of employment;
- d. amount of lump sum payment;
- e. rate of pay on which lump sum payment is based;
- f. period of lump sum payment including start date, end date and number of weeks;
- g. number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including Applicable Taxes.

4. Enquiries - Request for Standing Offers

All enquiries must be submitted in writing to the Standing Offer Authority no later than 15 calendar days before the Request for Standing Offers (RFSO) closing date. Enquiries received after that time may not be answered.

Offerors should reference as accurately as possible the numbered item of the RFSO to which the enquiry relates. Care should be taken by offerors to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the questions or may request that offerors do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all offerors. Enquiries not submitted in a form that can be distributed to all offerors may not be answered by Canada.

5. Applicable Laws

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in British Columbia.

Offerors may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their offer, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the offerors.

PART 3 - OFFER PREPARATION INSTRUCTIONS

1. Offer Preparation Instructions

Canada requests that offerors provide their offer in separately bound sections as follows:

Section I: Technical Offer (2 hard copies and 1 soft copies on CD/DVD or USB flash drive)
Section II: Financial Offer (1 hard copies)
Section III: Certifications (1 hard copies)

If there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

Prices must appear in the financial offer only. No prices must be indicated in any other section of the offer.

Canada requests that offerors follow the format instructions described below in the preparation of their offer.

- (a) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- (b) use a numbering system that corresponds to that of the Request for Standing Offers.

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process [Policy on Green Procurement](http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, offerors should:

- 1) use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
- 2) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.

Section I: Technical Offer

In their technical offer, offerors should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

Section II: Financial Offer

Offerors must submit their financial offer in accordance with the Annex B, Basis of Payment. The total amount of Applicable Taxes must be shown separately.

Payment by Credit Card

Canada requests that offerors complete one of the following:

- (a) ☐ Government of Canada Acquisition Cards (credit cards) will be accepted for payment of call-ups against the standing offer.

The following credit card(s) are accepted:

VISA _____

Master Card _____

- (b) ☐ Government of Canada Acquisition Cards (credit cards) will not be accepted for payment of call-ups against the standing offer.

The Offeror is not obligated to accept payment by credit card.

Acceptance of credit cards for payment of call-ups will not be considered as an evaluation criterion.

Section III: Certifications

Offerors must submit the certifications required under Part 5

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures

- (a) Offers will be assessed in accordance with the entire requirement of the Request for Standing Offers including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the offers.

1.1. Technical Evaluation

1.1.1 Mandatory Technical Criteria

All bids must be completed in full and provide all of the information requested in the bid solicitation to enable full evaluation. To be considered responsive, a bid must meet all of the mandatory requirements of this solicitation. Bids not meeting all of the mandatory requirements will be given no further consideration.

| PART A – Mandatory Criteria | MEETS | |
|---|-------|----|
| | Yes | No |
| Provide a course outline and an instructional plan for all required courses | | |
| Provide a copy of all course manuals and materials to be used for the following courses: | | |
| i. Introduction to Project Management | | |
| ii. Project Management | | |
| iii. Project Risk Management | | |
| Provide instructors who have recent (minimum of 100 hours in the last 2 years) and significant (minimum of 450 hours in the last 5 years) experience in the delivery of the required courses to adults. | | |
| Provide a resume for each instructor which outlines: | | |
| i. Experience delivering training to adults | | |
| ii. Experience delivering Project Management training to other government organizations and large companies. | | |
| iii. Copies of post secondary degrees, diplomas, and/or certificates and details of any other training related to the subject matter of the course or in the field of adult learning. | | |
| iv. Letters of reference from 3 organizations confirming that they have used the instructor for this type of training and were satisfied with the service they received. | | |
| Each resume must clearly identify the names of courses taught, duration of the course (in hours), who the training was provided to, and the number of times delivered | | |
| Project Experience must outline the date of the project, description of the project, who it was completed for, and a description of the proposed | | |

| | | |
|---|--|--|
| instructor's role in the project. | | |
| The bidder must be a "Registered Education Provider" (REP) approved by the Project Management Institute (PMI) and provides a copy of certificate. | | |
| Any software used by the contractor must be compatible with MS office 2003 or higher version. | | |

1.1.2 Point Rated Technical Criteria

| # | PART B – TECHNICAL/MANAGEMENT RATED CRITERIA | MAXIMUM POINTS |
|----|--|----------------|
| 1a | Course Content and Training Methodology <ul style="list-style-type: none"> • Instructional plan is clear and relevant. (5 points) • All learning objectives are covered in appropriate detail (13 points) • Amount of time allocated to each objective or topic is appropriate. (5 points) • Any additional topics are relevant and value-added. (2 points) • A variety of methods and techniques are used. (7 points) • Methods and techniques are appropriate for the topic and audience. (8 points) Minimum score to pass this section: 24 | 40 |
| 1b | Course Materials – Quality, clarity and relevance of materials <ul style="list-style-type: none"> • Materials are clear, concise and easy to understand. (5 points) • Supports the course objectives. (5 points) • Well organized. (5 points) • Contain job aids/tools. (5 points) • Variety/Appearance (Text, pictures, charts, use of colour, diagrams etc). (5 points) Minimum score to pass this section: 15 | 25 |
| 1e | Instructor (s) experience and education - In instances where there is more than one instructor, an average may be taken of their scores for this part of the evaluation. <p>a) Recent teaching experience delivering Project Management training (21 points).</p> <ul style="list-style-type: none"> • 3 points per year of experience, over and above the mandatory 5 years, to a maximum of 16 points within the last 10 years. A minimum of 5 courses delivered per year. (16 points) 5 years experience – 1 pts 6 years experience – 4 pts 7 years experience – 7 pts 8 years experience – 10 pts 9 years experience – 13 pts 10 years experience – 16 pts • Additional 5 points if delivered a minimum of 20 courses within the last 5 years to DND or other federal or provincial departments or large organization. (5 points) <p>b) Work experience in Project Management. (9 points)</p> | 35 |

| | | |
|--|---|------------|
| | <ul style="list-style-type: none"> 1 point per year of experience. A minimum of 4 weeks of project management work per year within the past 15 years. <p>c) Educational background in the area of adult learning & training delivery. (2 points)</p> <ul style="list-style-type: none"> 4 or more courses successfully completed (1 point) OR Post secondary certificate, diploma, or degree (2 points) <p>d) Educational background in a subject area relevant to the training and/or in a technical field applicable to the Department of National Defence (i.e. Engineering, IT, Business Administration). (3 points)</p> <ul style="list-style-type: none"> Post secondary diploma (.5 point) PMP designation certificate (1 point) Bachelors Degree (1.5 points) Masters Degree (2 points) <p>Minimum score to pass this section: 21points</p> | |
| | TOTAL AVAILABLE POINTS | 100 |
| | Minimum Pass Mark | 70 |

INSTRUCTOR TRAINING EXPERIENCE:

| Date | Name of Course | Duration of course | Number of participants | Name and address of organization to which training was delivered |
|------|----------------|--------------------|------------------------|--|
| | | | | |
| | | | | |
| | | | | |
| | | | | |

2. Basis of Selection - Highest Combined Rating of Technical Merit and Price

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria; and
 - c. obtain the required minimum points specified for each criterion for the technical evaluation, and
 - d. obtain the required minimum of 70 points overall for the technical evaluation criteria which are subject to point rating.

The rating is performed on a scale of 100 points.

2. Bids not meeting (a) or (b) or (c) and (d) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 60 % for the technical merit and 40 % for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 60 %.

5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 40 %.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 60/40 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$45,000 (45).

| | | Bidder 1 | Bidder 2 | Bidder 3 |
|--------------------------------|------------------------------|----------------------|---------------------|---------------------|
| Overall Technical Score | | 115/135 | 89/135 | 92/135 |
| Bid Evaluated Price | | \$55,000.00 | \$50,000.00 | \$45,000.00 |
| Calculations | Technical Merit Score | 115/135 x 60 = 51.11 | 89/135 x 60 = 39.56 | 92/135 x 60 = 40.89 |
| | Pricing Score | 45/55 x 40 = 32.73 | 45/50 x 40 = 36.00 | 45/45 x 40 = 40.00 |
| Combined Rating | | 83.84 | 75.56 | 80.89 |
| Overall Rating | | 1st | 3rd | 2nd |

PART 5 - CERTIFICATIONS

Offerors must provide the required certifications and related documentation to be issued a standing offer. Canada will declare an offer non-responsive if the required certifications and related documentation are not completed and submitted as requested.

Compliance with the certifications offerors provide to Canada is subject to verification by Canada during the offer evaluation period (before issuance of a standing offer) and after issuance of a standing offer. The Standing Offer Authority will have the right to ask for additional information to verify offerors' compliance with the certifications before issuance of a standing offer. The offer will be declared non-responsive if any certification made by the Offeror is untrue, whether made knowingly or unknowingly. Failure to comply with the certifications, to provide the related documentation or to comply with the request of the Standing Offer Authority for additional information will also render the offer non-responsive.

1. Mandatory Certifications Required Precedent to Issuance of a Standing Offer

1.1 Code of Conduct and Certifications - Related documentation

By submitting an offer, the Offeror certifies that the Offeror and its affiliates are in compliance with the provisions as stated in Section 01 Code of Conduct and Certifications – Offer of Standard Instructions 2006. The related documentation therein required will assist Canada in confirming that the certifications are true.

2. Additional Certifications Precedent to Issuance of a Standing Offer

The certifications listed below should be completed and submitted with the offer, but may be submitted afterwards. If any of these required certifications is not completed and submitted as requested, the Standing Offer Authority will so inform the Offeror and provide the Offeror with a time frame within which to meet the requirement. Failure to comply with the request of the Standing Offer Authority and meet the requirement within that time period will render the offer non-responsive.

2.1 Federal Contractors Program - Certification

1. The Federal Contractors Program (FCP) requires that some suppliers, including a supplier who is a member of a joint venture, bidding for federal government contracts, valued at \$200,000 or more (including all applicable taxes), make a formal commitment to implement employment equity. This is a condition precedent to contract award. If the Bidder, or, if the Bidder is a joint venture and if any member of the joint venture, is subject to the FCP, evidence of its commitment must be provided before the award of the Contract.

Suppliers who have been declared ineligible contractors by Human Resources and Skills Development Canada (HRSDC) are no longer eligible to receive government contracts over the threshold for solicitation of bids as set out in the *Government Contracts Regulations*. Suppliers may be declared ineligible contractors either as a result of a finding of non-compliance by HRSDC, or following their voluntary withdrawal from the FCP for a reason other than the reduction of their workforce to less than 100 employees. Any bids from ineligible contractors, including a bid from a joint venture that has a member who is an ineligible contractor, will be declared non-responsive.

2. If the Bidder does not fall within the exceptions enumerated in 3.(a) or (b) below, or does not have a valid certificate number confirming its adherence to the FCP, the Bidder must fax (819-953-8768) a copy of the signed form LAB 1168, Certificate of Commitment to Implement Employment Equity, to the Labour Branch of HRSDC.
3. The Bidder, or, if the Bidder is a joint venture the member of the joint venture, certifies its status with the FCP, as follows:

The Bidder or the member of the joint venture

- a. () is not subject to the FCP, having a workforce of less than 100 full-time or part-time permanent employees, and/or temporary employees having worked 12 weeks or more in Canada;
- b. () is not subject to the FCP, being a regulated employer under the *Employment Equity Act*, S.C. 1995, c. 44;
- c. () is subject to the requirements of the FCP, having a workforce of 100 or more full-time or part-time permanent employees, and/or temporary employees having worked 12 weeks or more in Canada, but has not previously obtained a certificate number from HRSDC (having not bid on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is attached;
- d. () is subject to the FCP, and has a valid certificate number as follows: _____ (e.g. has not been declared an ineligible contractor by HRSDC).

Further information on the FCP is available on the HRSDC Web site.

2.2 Status and Availability of Resources

The Offeror certifies that, should it be issued a standing offer as a result of the Request for Standing Offer, every individual proposed in its offer will be available to perform the Work resulting from a call-up against the Standing Offer as required by Canada's representatives and at the time specified in a call-up or agreed to with Canada's representatives. If for reasons beyond its control, the Offeror is unable to provide the services of an individual named in its offer, the Offeror may propose a substitute with similar qualifications and experience. The Offeror must advise the Standing Offer Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Offeror: death, sickness,

maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

If the Offeror has proposed any individual who is not an employee of the Offeror, the Offeror certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Offeror must, upon request from the Standing Offer Authority, provide a written confirmation, signed by the individual, of the permission given to the Offeror and of his/her availability. Failure to comply with the request may result in the offer being declared non-responsive.

PART 6 - STANDING OFFER AND RESULTING CONTRACT CLAUSES

A. STANDING OFFER

1. Offer

The Offeror offers to perform the Work in accordance with the Statement of Work at Annex "A".

2. Standard Clauses and Conditions

All clauses and conditions identified in the Standing Offer and resulting contract(s) by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

2.1 General Conditions

2005 (2012-11-19) General Conditions - Standing Offers - Goods or Services, apply to and form part of the Standing Offer.

2.2 Standing Offers Reporting

The Offeror must compile and maintain records on its provision of goods, services or both to the federal government under contracts resulting from the Standing Offer. This data must include all purchases, including those paid for by a Government of Canada Acquisition Card.

The Offeror must provide this data in accordance with the reporting requirements detailed in Annex D. If some data is not available, the reason must be indicated. If no goods or services are provided during a given period, the Offeror must still provide a "nil" report.

The data must be submitted on a bi-annual basis to the Standing Offer Authority.

The bi-annual reporting periods are defined as follows:

1st period: April 1 to September 30;

2nd period: October 1 to March 31.

The data must be submitted to the Standing Offer Authority no later than 30 calendar days after the end of the reporting period.

3. Term of Standing Offer

3.1 Period of the Standing Offer

The period for making call-ups against the Standing Offer is 2 years from the award of Standing Offer.

3.2 Extension of Standing Offer

If the Standing Offer is authorized for use beyond the initial period, the Offeror offers to extend its offer for an additional period of 2 years under the same conditions and at the rates or prices

specified in the Standing Offer, or at the rates or prices calculated in accordance with the formula specified in the Standing Offer.

The Offeror will be advised of the decision to authorize the use of the Standing Offer for an extended period by the Standing Offer Authority 60 days before the expiry date of the Standing Offer. A revision to the Standing Offer will be issued by the Standing Offer Authority.

4. Authorities

4.1 Standing Offer Authority

The Standing Offer Authority is:

Isabell (Ji-Yon) Park

Supply Specialist | Spécialiste de l'approvisionnement
Public Works and Government Services Canada | Travaux publics et Services Gouvernementaux Canada
Pacific Region | Région du Pacifique
401-1230 Government Street | 401-1230 Rue Government
Victoria, B.C (C.-B.) V8W3X4
Telephone | Téléphone: (250) 363-3981
Facsimile | Télécopier: (250) 363-0395
Email | Courriel: ji-yonisabell.park@pwgsc-tpsgc.gc.ca

The Standing Offer Authority is responsible for the establishment of the Standing Offer, its administration and its revision, if applicable. Upon the making of a call-up, as Contracting Authority, he is responsible for any contractual issues relating to individual call-ups made against the Standing Offer by any Identified User.

4.2 Project Authority

The Project Authority for the Standing Offer is identified in the call-up against the Standing Offer.

The Project Authority is the representative of the department or agency for whom the Work will be carried out pursuant to a call-up against the Standing Offer and is responsible for all the technical content of the Work under the resulting Contract.

4.3 Offeror's Representative

Name: _____

Title: _____

Company: _____

Telephone: _____

Facsimile: _____

5. Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a Public Service Superannuation Act (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada.

6. Identified Users

The Identified User authorized to make call-ups against the Standing Offer is: Department of National Defence, CFB Esquimalt.

7. Call-up Instrument

The Work will be authorized or confirmed by the Identified User(s) using form PWGSC-TPSGC 942, Call-up Against a Standing Offer or an electronic version.

8. Limitation of Call-ups

Individual call-ups against the Standing Offer must not exceed **\$40,000.00** (Applicable Taxes included).

9. Financial Limitation

The total cost to Canada resulting from call ups against the Standing Offer must not exceed the sum of **\$300,000.00** (Applicable Taxes included) unless otherwise authorized in writing by the Standing Offer Authority. The Offeror must not perform any work or services or supply any articles in response to call ups which would cause the total cost to Canada to exceed the said sum, unless an increase is so authorized.

The Offeror must notify the Standing Offer Authority as to the adequacy of this sum when 75 percent of this amount has been committed, or 3 months before the expiry date of the Standing Offer, whichever comes first. However, if at any time, the Offeror considers that the said sum may be exceeded, the Offeror must promptly notify the Standing Offer Authority.

10. Priority of Documents

If there is a discrepancy between the wording of any documents that appear on the list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

- a) the call up against the Standing Offer, including any annexes;
- b) the articles of the Standing Offer;
- c) the general conditions 2005 (2012-11-19), General Conditions - Standing Offers - Goods or Services
- d) the general conditions 2010B (2013-03-21), General Conditions - Professional Services (Medium Complexity);
- e) Annex A, Statement of Work;
- f) Annex B, Basis of Payment;
- g) the Offeror's offer dated (*insert date of offer*), (*if the offer was clarified or amended, insert at the time of issuance of the offer: "as clarified on _____" or "as amended on _____" and insert date(s) of clarification(s) or amendment(s) if applicable*).

11. Certifications

11.1 Compliance

Compliance with the certifications and related documentation provided by the Offeror is a condition of authorization of the Standing Offer and subject to verification by Canada during the term of the Standing Offer and of any resulting contract that would continue beyond the period of the Standing Offer. In the event that the Offeror does not comply with any certification, provide the related documentation or if it is determined that any certification made by the Offeror in its offer is untrue, whether made knowingly or unknowingly, Canada has the right to terminate any resulting contract for default and set aside the Standing Offer.

11.2 Status and Availability of Resources

If for reasons beyond its control, the Offeror is unable to provide the services of an individual named in its offer, the Offeror may propose a substitute with similar qualifications and experience. The Offeror must advise the Standing Offer Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Offeror:

death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

If the Offeror is unable to provide a substitute with similar qualifications and experience, Canada may set aside the standing offer.

12. Applicable Laws

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in (*Insert the name of the province or territory as specified by the offeror in its offer, if applicable*).

B. RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of any contract resulting from a call-up against the Standing Offer.

1. Statement of Work

The Contractor must perform the Work described in the call-up against the Standing Offer.

2. Standard Clauses and Conditions

2.1 General Conditions

2010B (2013-03-21), General Conditions - Professional Services (Medium Complexity) apply to and form part of the Contract.

Section 15 Interest on Overdue Accounts, of 2010B (2013-03-21), General Conditions - Professional Services (Medium Complexity) will not apply to payments made by credit cards.

3. Term of Contract

3.1 Period of the Contract

The Work must be completed in accordance with the call-up against the Standing Offer.

4. Proactive Disclosure of Contracts with Former Public Servants – if applicable

By providing information on its status, with respect to being a former public servant in receipt of a *Public Service Superannuation Act* (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada.

5. Payment

5.1 Basis of Payment

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price of \$ (*insert amount at contract award*). Customs duties are included and Applicable Taxes are extra.

5.2 Limitation of Price

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

5.3 Single Payment

Canada will pay the Contractor upon completion and delivery of the Work in accordance with the payment provisions of the Contract if:

- a. an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all such documents have been verified by Canada;
- c. the Work delivered has been accepted by Canada.

5.4 T1204 - Direct Request by Customer Department

1. Pursuant to paragraph 221 (1)(d) of the Income Tax Act, R.S. 1985, c. 1 (5th Supp.), payments made by departments and agencies to contractors under applicable services contracts (including contracts involving a mix of goods and services) must be reported on a T1204 Government Service Contract Payments slip.
2. To enable departments and agencies to comply with this requirement, the Contractor must provide Canada, upon request, its business number or Social Insurance Number, as applicable. (These requests may take the form of a general call-letter to contractors, in writing or by telephone).

5.5 Payment by Credit Card

The following credit cards are accepted: _____ and _____.

6. Invoicing Instructions

1. The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.
2. Invoices must be distributed as follows:
 - a. The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.

7. Insurance

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.

ANNEX A

STATEMENT OF WORK

Project Management Training

1.0 Scope:

To establish a Standing Offer to provide Project Management training to the Department of National Defence, Canadian Forces Base Esquimalt on an as and when requested basis for a period of two (2) years with an option to renew for another two (2) years.

2.0 Objective:

The objective of this contract is the delivery of the following “off the shelf” project management courses:

- i) Introduction to Project Management
- ii) Project Management
- iii) Project Risk Management
- iv) Scheduling & Cost Control
- v) Quality Management in Projects
- vi) Scope Management in Projects
- vii) Managing Multiple Portfolios
- viii) Other courses in Project Management as Required

3.0 Participants:

DND civilian employees and military members

4.0 Delivery Location:

The majority of the training will take place in Esquimalt, but may also be required for Comox/Nanaimo.

5.0 Tasks/Technical Specifications:

THE FOLLOWING TABLE LISTS THE COURSES REQUIRED UNDER THE STANDING OFFER. COURSES MUST HAVE THE FOLLOWING CONTENT AND MEET THE STATED LEARNING OBJECTIVES ALONG WITH ANY OTHER SPECIAL REQUIREMENTS IDENTIFIED.

| PROJECT MANAGMENT | |
|-----------------------------|---|
| 01 A Course Title | Introduction to Project Management |
| Objective | To provide an overview and introduction to project management based upon the Project Management Body of Knowledge (PMBOK) |
| Course Duration | 1 day (6.0 hours of training per day) |
| Audience | Individuals who are new to the project management process and who are currently working or anticipate working on a project team in a supportive role. |
| Course Topics | <ul style="list-style-type: none"> a) To understand the benefits of project management and how to achieve them b) The project management cycle/framework c) The key steps of the project planning and control process d) To define roles and responsibilities of key project staff e) Key project language and terminology |
| Special requirements | N/A |

| | |
|-----------------------------|---|
| 01 B Course Title | Project Management |
| Objective | To provide a working understanding of project management principles and processes based on the Project Management Body of Knowledge (PMBOK) |
| Course Duration | 4 days (6.0 training hours per day) |
| Audience | <ul style="list-style-type: none"> • Individuals who are new to the project management process and are anticipating beginning to work, or are currently working on significant formal projects • Individuals who have previously participated in formal projects, but need background knowledge in project management principles and processes • May include Project Managers or Project Leaders. |
| Course Topics | <ol style="list-style-type: none"> a) Define project management terminology and concepts as defined by the Project Management Institute b) Understand when it is appropriate to apply project management principles c) Understand and utilize the stages of the project management cycle/framework d) Prepare and manage project documents e) Clarify and define the scope of a project f) Interpret project data and reports g) Use appropriate tools (i.e. Gantt charts, Critical path analysis) to facilitate the Project h) Management process i) Manage stakeholder expectations j) Prepare and defend project schedules k) Allocate resources effectively l) Identify and manage project risk m) Monitor and evaluate projects for success n) Administer a project throughout the project lifecycle from planning to close out. |
| Special requirements | N/A |
| 01 C Course Title | Project Risk Management |
| Objective | To provide in depth information on the risk management area of project management based upon the PMI Practice Standard for Project Risk Management. |
| Course Duration | 3 days (6.0 hours of training per day) |
| Audience | Individuals who have completed the 4 day project management course who need more in depth information on the risk management areas of project management |
| Course Topics | <ul style="list-style-type: none"> • Determine how to approach, plan and execute the risk management activities for a project. • Determine which risks might affect the project and document their characteristics • Prioritize risk • Analyze the effect of risks on the overall project objectives • Develop options and actions to manage risk • Track and monitor risks throughout the project life cycle |
| Special | N/A |

| | |
|-----------------------------|--|
| requirements | |
| 01 D Course Title | Scheduling and Cost Control |
| Objective | To provide in depth information on the scheduling area of project management including limits on time, human resources, materials, budget and specifications |
| Course Duration | 4 days (6.0 hours of training per day) |
| Audience | Individuals who have completed the 4 day project management course who need more in depth information on the scheduling and cost control areas of project management |
| Course Topics | <ul style="list-style-type: none"> Identify the specific activities that need to be performed, and identify and document dependencies among these activities Estimate the type and quantities of resources and the number of work periods that will be needed to complete schedule activities Create schedules and monitor and control changes to the project schedule. Estimate, budget and control costs |
| Special requirements | Linkages should be made to both MS Project and Oracle Primavera software in supporting scheduling practices. |
| 01 E Course Title | Quality Management in Projects |
| Objective | To provide in depth information on the quality management area of project management and learn to use tools and techniques for planning and implementing quality methods in a project environment |
| Course Duration | 2 days (6.0 hours of training per day) |
| Audience | Individuals who have completed the 4 day project management course who need more in depth information on the quality management area of project management |
| Course Topics | <ul style="list-style-type: none"> Select the appropriate quality assurance and quality control tools for your project Prepare and implement a quality management plan Monitor to determine whether quality standards are maintained |
| Special requirements | N/A |
| 01 F Course Title | Scope Management in Projects |
| Objective | To provide in depth information on scope management area of project management including how to define, describe, organize, and manage what is and what is not included in a project in a structured and professional manner. |
| Course Duration | 1 day (6.0 hours of training per day) |
| Audience | Individuals who have completed the 4 day project management course who need more in depth information on managing scope in projects. |
| Course Topics | <ul style="list-style-type: none"> Create a project scope management plan that documents how the project scope will be defined, verified, and controlled Develop a detailed project scope statement Create the Work Break Down Structure Verify the Scope Control changes to the project scope |
| Special requirements | N/A |

| | |
|-----------------------------|---|
| 01 G Course Title | Managing Multiple Portfolios |
| Objective | To provide in depth information on strategies, techniques and best practices of concurrently managing multiple portfolios. |
| Course Duration | 2 days (6.0 hours of training per day) |
| Audience | Individuals who have completed the 4 day project management course who are managing multiple projects/portfolios. |
| Course Topics | <ul style="list-style-type: none"> • Understand the differences between managing single and multiple projects • Implement multitasking and linking for concurrent portfolios • Resource and prioritize multiple portfolios • Monitor multiple portfolios • Resolve multiple portfolio conflicts • Establish controls and reporting for multiple portfolios • Understand the political role of the manager of multiple portfolios |
| Special requirements | N/A |
| 01 H Course Title | Other courses in Project Management as required |
| Objective | To provide in depth information on other areas of project management as required |
| Course Duration | 1-5 days (6.0 hours of training per day) |
| Audience | Individuals who have completed the 4 day project management course who need more in depth information on specific areas of project management |
| Course Topics | To be determined |
| Special requirements | Provide pricing on a per training day basis as follows: <ul style="list-style-type: none"> • Based upon delivery of already designed and developed “off the shelf” courses which require minimal customization to include examples pertinent to the Department of National Defence. <ul style="list-style-type: none"> ○ Provide a list of courses and course topics which your organization currently offers “off the shelf” beyond the courses specifically requested in this Statement of Work. • Based upon the delivery of custom developed courses specific to the needs of the Department of National Defence. |

6.0 Tasks (for each of the Courses)

- a. Provide Training Services: The Contractor must deliver any or all of the courses, as requested and scheduled by DND and as agreed to by the Contractor.
 - i) The Contractor must deliver and conduct the training and provide all course materials for up to 20 participants as detailed in its Technical Proposal and as referenced in the standing offer. The contractor must provide the cost for additional students above 20 if the requirement for a larger training session was deemed appropriate. All training must use adult education techniques covering the respective objectives in English; and
 - ii) Training will be delivered between the hours of 8:30am and 4:00 pm with a 60-minute lunch break, a 15-minute mid-morning break and a 15-minute mid-afternoon break. Times may be adjusted slightly by the Learning & Career Centre to meet local client needs; and

- iii) The Contractor must be able to incorporate work examples/work packages into their training when this information is provided by DND; and
 - iv) The Contractor must be a "Registered Education Provider" (REP) approved by the Project Management Institute (PMI).
- b. Provide Qualified Instructors: The Contractor must provide a minimum of 1 qualified primary instructor for each Course, as identified in the Contractor's original proposal. The Contractor must also provide a minimum of 1 qualified back-up instructor for each Course, as identified in the Contractor's original proposal, as a substitute for the primary instructor should the Contractor be unable to provide the primary instructor.
- i) All instructors (i.e. both originally proposed resource(s) and any proposed back-up resource(s)) provided by the Contractor for each and every course must, as a minimum, possess the following qualification, skill, and experience:

Must have recent (minimum of 100 hours in the last 2 years) and significant (minimum of 450 hours in the last 5 years) experience in the delivery of the required courses to adults.
- c. Instructor Replacement. Any instructor that is proposed as a replacement during the term of the contract, who was not identified in the Contractor's proposal, must meet or exceed the qualifications and experiences of the originally-proposed resource. When an instructor is to be replaced, the Contractor must immediately notify DND and demonstrate that the proposed replacement meets or exceeds the education, qualifications and experience of the original resource. Replacement instructor must not deliver any course under this standing offer unless approved by DND. DND reserves the right to request a replacement for any instructor deemed inadequate or inappropriate in DND's sole opinion. The Contractor must immediately replace the identified instructor(s).
- d. Revisions to Courses as Required by Updates to the PMBOK® Guide. For each course, the Contractor must prepare, maintain and update the course content and all accompanying materials, to cover any release of an updated version of the PMBOK® Guide. Delivery of the revised courses and the provision of updated course materials must occur within 6 months of publication (i.e. release date) of the newly released version of the PMBOK® Guide. Any additional costs to maintain course currency is the responsibility of the Contractor.
- e. Manage Training Aids. The Contractor must manage all contractor-provided training aids including any software and contractor hardware necessary for teaching purposes.
- f. Award Professional Development Units (PDU's). The Contractor must award Professional Development Units (PDU's) from the Project Management Institute (PMI®).
- h. Perform Class Administration. Administration for each Course includes, but is not limited to, the following:
- i) Arriving a minimum of 30 minutes prior to the start of training to set up of the training facility (e.g. distribution of training materials, etc.); and
 - ii) Brief course participants on administrative matters pertaining to the Learning & Career Centre (LCC) and those applicable to the conduct of the course; and
 - iii) Provide students with 10 minutes at the end of the course to complete a course evaluation and administer the "Course Evaluation" form provided by the LCC for each course serial.

- iv) Provide students with a Certificate of Completion for each course that indicates the course is Project Management Institute (PMI) certified.

7.0 Constraints:

- a) The Project Authority, or their designate, reserves the right to monitor the delivery of all courses and suggest improvement for delivery. Satisfactory delivery of services will be determined through feedback from course participants, monitoring of courses, and completion of course objectives.
- b) The Project Authority reserves the right to cancel any course at any time within ten (10) business days notice without cancellation penalty.
- c) Any software used by the contractor must be compatible with that currently used by the DND. Software currently in use is MS Word 2003, MS Excel 2003, MS PowerPoint 2003, MS Access 2003, and MS Project 2003, but it is anticipated that an update to 2010 versions of the software will be completed in 2013.
- d) Course participant information must not be used to solicit for the Contractor's future training.

8.0 Client Support:

DND will be responsible for providing the following support:

- a. 1 Classroom and minimum of 2 break-out rooms.
- b. Multi-media podium with projector, screen, laptop connection, DVD player, and audio system.
- c. Flip charts, whiteboards and markers.
- d. Access to photocopy facilities to copy student work/project plans.
- e. Technical support and familiarization of contractor personnel with the use of Crown facilities.
- f. Marketing and registration for all courses.
- g. Minimum thirty (30) days notice to the contractor when scheduling a session.

9.0 Deliverables:

For each Course:

- a. Updated Course Materials. The Contractor must provide up-to-date course materials and training aids for each participant. The course materials include, but are not limited to the following: reference material including any applicable textbook(s), course manual(s), exercise material including suggested solutions, hand-outs, copy of presentation material (e.g. PowerPoint slides), templates, etc. The participants will retain all participant course materials.
- b. Language of Course Materials. The Contractor must provide all course materials in English
- c. Course Materials in Hard and Soft Copies. All course materials (e.g. Instructor manual, Student manual, handouts and slide deck/presentations, as appropriate) for each course must be delivered in both hard copy and soft copy using MSOffice products (MS Word, MS Excel, MS PowerPoint).
- d. Prepare, Administer, and Submit Various Reports. For each course serial, the delivery of all reports includes, but is not limited to, the following:

- i) The Contractor must provide the original completed individual "Student Attendance Record" (supplied by the LCC) to DND; and
 - ii) The Contractor must provide the original completed participant "Course Evaluation/Critique" forms (supplied by LCC) to DND;
- e. Issue Certificates of Completion and Provide Proof of PDU's awarded. The Contractor must provide a certificate of completion to each student, upon satisfactory completion of a course. The certificate must include, as a minimum, the number of PDU's associated with each course, the course date, the student's name, and be signed by the Contractor.

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* For the purposes of bid evaluation, courses identified with asterisks (*) and the cost submitted for a class of 20 participants will be used

Annex C

Standing Offer Usage Report

The bi-annual reporting periods are defined as follows:

1st period: April 1 to September 30;

2nd period: October 1 to March 31.

The data must be submitted to the Standing Offer Authority no later than 30 calendar days after the end of the reporting period.

Reporting Period: _____

| Course | Number of Call-ups | Total Call-up Value (Victoria) | Total Call-up Value (Comox/Nanaimo) |
|------------------------------------|-------------------------------|---|--|
| Introduction to Project Management | | | |
| Project Management | | | |
| Project Risk Management | | | |
| Scheduling & Cost Control | | | |
| Quality Management in Projects | | | |
| Scope Management in Projects | | | |
| Managing Multiple Portfolios | | | |
| Other courses in PM Title: | | | |