

RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:

Bid Receiving - PWGSC / Réception des soumissions - TPSGC

11 Laurier St. / 11, rue Laurier

Place du Portage , Phase III

Core 0A1 / Noyau 0A1

Gatineau, Québec K1A 0S5

Bid Fax: (819) 997-9776

Request For a Standing Offer Demande d'offre à commandes

National Master Standing Offer (NMSO)

Offre à commandes principale et nationale (OCPN)

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

Training and Specialized Services Division/Division de la formation et des services spécialisés

11 Laurier St. / 11, rue Laurier

10C1, Place du Portage

Gatineau, Québec K1A 0S5

Title - Sujet MANAGING TIME & PRIORITIES W/OUTLOO	
Solicitation No. - N° de l'invitation EN519-130108/A	Date 2013-02-20
Client Reference No. - N° de référence du client 20130108	GETS Ref. No. - N° de réf. de SEAG PW-\$ZHZ-124-25469
File No. - N° de dossier 124zh.EN519-130108	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2013-04-04	Time Zone Fuseau horaire Eastern Standard Time EST
Delivery Required - Livraison exigée See Herein	
Address Enquiries to: - Adresser toutes questions à: Bouchard, Suzy	Buyer Id - Id de l'acheteur 124zh
Telephone No. - N° de téléphone (819)956-1666 ()	FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: DEPARTMENT OF PUBLIC WORKS AND GOVERNMENT SERVICES CANADA PORTAGE III 11 LAURIER ST Gatineau Quebec K1A0S5 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

REQUEST FOR STANDING OFFER FOR MICROSOFT OUTLOOK TRAINING

TABLE OF CONTENTS

PART 1 - GENERAL INFORMATION

1. Introduction
2. Summary
3. Debriefings

PART 2 - OFFEROR INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions
2. Submission of Offers
3. Enquiries - Request for Standing Offers
4. Applicable Laws

PART 3 - OFFER PREPARATION INSTRUCTIONS

1. Offer Preparation Instructions

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures
2. Basis of Selection

PART 5 - CERTIFICATIONS

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

PART 6 - SECURITY, FINANCIAL AND INSURANCE REQUIREMENTS

1. Financial Capability

List of Attachments:

Attachment 1 to Part 3 - Pricing Schedule
Attachment 1 to Part 4 - Technical Criteria

PART 7 - STANDING OFFER AND RESULTING CONTRACT CLAUSES

A. STANDING OFFER

1. Offer
2. Standard Clauses and Conditions
3. Term of Standing Offer
4. Authorities
5. Identified Users

-
6. Call-up Procedures
 7. Call-up Instrument
 8. Limitation of Call-ups
 9. Priority of Documents
 10. Certifications
 11. Applicable Laws

B. RESULTING CONTRACT CLAUSES

1. Statement of Work
2. Standard Clauses and Conditions
3. Term of Contract
4. Payment
5. Invoicing Instructions
6. Insurance Requirements
7. Course cancellation
8. Terms and Conditions contained in Contractor Documentation

List of Annexes:

Annex A, Statement of Work
Annex B , Basis of Payment
Annex C, Registration Form - Call-up Against a Standing Offer
Annex D, Semiannual Usage Report

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, if applicable, and the basis of selection; |
| Part 5 | Certifications: includes the certifications to be provided; |
| Part 6 | Financial and Insurance Requirements: includes specific requirements that must be addressed by offerors; and |
| Part 7 | 7A, Standing Offer, and 7B, Resulting Contract Clauses: |
| | 7A, includes the Standing Offer containing the offer from the Offeror and the applicable clauses and conditions; |
| | 7B, 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, Registration Form - Call-up Against a Standing Offer and Semiannual Usage Report.

2. Summary

- a) Public Works and Government Services Canada (PWGSC), has a requirement for the delivery of commercial off-the-shelf (COTS) courses in using Microsoft Outlook to manage time and priorities and Microsoft Outlook to manage projects effectively in order to increase employee's working knowledge of Microsoft Outlook, based productivity tools. The participants are employees of PWGSC in 3 locations: the National Capital Area (NCA), Matane, QC and Miramichi, NB.
- b) The Standing Offer (SO) period will be for 1 year with the irrevocable option to extend by 3 periods of one-year each.
- c) PWGSC will issue up to 3 SOs, one per location as identified in Annex A.
- d) There is no security requirement associated with this requirement.
- e) Pursuant to section 01 of Standard Instructions 2006, Offerors must submit a complete list of names of all individuals who are currently Directors of the Offeror. Furthermore, as determined by the Special Investigations Directorate, Departmental Oversight Branch, each individual named on the list

may be requested to complete a Consent to a Criminal Record Verification form and related documentation.

- f) The requirement is subject to the provisions of the North American Free Trade Agreement (NAFTA), and the Agreement on Internal Trade (AIT).

3. Debriefings

After issuance of a standing offer, 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>) 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 (2012-11-19) Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the RFSO.

The text under Subsection 4 of Section 05 - Submission of Offers - of 2006, Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, is amended as follows:

Delete: sixty (60) days

Insert: One hundred twenty (120) days

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.

Due to the nature of the Request for Standing Offers, transmission of offers by facsimile to PWGSC will not be accepted.

3. Enquiries - Request for Standing Offers

All enquiries must be submitted in writing to the Standing Offer Authority no later than ten (10) 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.

4. 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 Ontario.

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

Solicitation No. - N° de l'invitation

EN519-130108/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

124zh

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

20130108

File No. - N° du dossier

124zhEN519-130108

CCC No./N° CCC - FMS No/ N° VME

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 (4 hard copies);
 Section II: Financial Offer (1 hard copy); and
 Section III: Certifications and related documentation (1 hard copy).

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.

The Offeror can submit an offer on more than one location specified in the Statement of Work, but must submit one separate offer, under its own name or as part of a joint venture, for each specified locations. Canada requests that the Offeror clearly identifies in the first pages of its offer which location it is offering on.

Each offer constitutes a separate offer which will be evaluated independently, without regard to the other offers submitted by that Offeror. Therefore, each offer must be a physically separate with complete document.

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>).

To assist Canada in reaching its objectives, offerors should:

- 1) use 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.

The technical offer should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the offer will be evaluated. Simply repeating the statement contained in the request for standing offer is not sufficient. In order to facilitate the evaluation of the offer, Canada

requests that offerors address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, offerors may refer to different sections of their offers by identifying the specific paragraph and page number where the subject topic has already been addressed.

Part 4, Evaluation Procedures, contains additional instructions that offerors should consider when preparing their technical offer.

Section II: Financial Offer

- (a) Offerors must submit their financial offer in Canadian funds and in accordance with the pricing schedule detailed in Attachment 1 to Part 3. The Attachment 1 to Part 3 includes 3 sections, one for each locations. The Offeror must use the appropriate section below:

Section A: Offer for National Capital Area

Section B: Offer for Matane

Section C: Offer for Miramichi

- (b) The total amount of Goods and Services Tax (GST) or Harmonized Sales Tax (HST) must be shown separately, if applicable.
- (c) When preparing their financial offer, offerors should review the basis of payment in Annex B and clause 1.2, Financial Evaluation, of Part 4.
- (d) Offerors should include the following information in their financial offer:
- i) Their legal name;
 - ii) Their Procurement Business Number (PBN); and
 - iii) The name of the contact person (including this person's mailing address, phone and facsimile numbers and email address) authorized by the Offeror to enter into communications with Canada with regards to:
 - A. their Offer and
 - B. any Standing Offer that may result from their Offer.

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

Solicitation No. - N° de l'invitation

EN519-130108/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

124zh

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

File No. - N° du dossier

CCC No./N° CCC - FMS No/ N° VME

20130108

124zhEN519-130108

Offerors must submit the certifications required under Part 5 and the related documentation in Section III of their bid.

Solicitation No. - N° de l'invitation

EN519-130108/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

124zh

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

File No. - N° du dossier

CCC No./N° CCC - FMS No/ N° VME

20130108

124zhEN519-130108

Attachment 1 to Part 3 Pricing Schedule

See attached Microsoft Excel spreadsheet

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

Refer to Attachment 1 to Part 4.

1.2 Financial Evaluation

- (a) For offer evaluation and Offeror selection purposes only, the evaluated price of an offer will be determined in accordance with the Pricing Schedule detailed in Attachment 1 to Part 3.
- (b) The volumetric data included in the Pricing Schedule detailed in Attachment 1 to Part 3 is provided for offer evaluated price determination purposes only. It is not to be considered as a contract guarantee.

2. Basis of Selection

An offer must comply with the requirements of the Request for Standing Offers and meet all mandatory technical evaluation criteria to be declared responsive.

The responsive offer with the lowest evaluated price for each location will be recommended for issuance of a standing offer.

If an Offeror has more than one responsive offers with the lowest evaluated price (within different locations), only one NISO will be recommended for issuance which will combine the specific locations.

ATTACHMENT 1 TO PART 4 TECHNICAL CRITERIA

The technical offer must meet the mandatory technical criteria specified in the table below. The Offeror must provide the necessary documentation to support compliance.

Any Offer which fails to meet the mandatory technical criteria will be declared non-responsive. Each criteria should be addressed separately.

Mandatory Technical Criteria (MT)	
Number	Mandatory Technical Criterion
MT1	<p>The Offeror must demonstrate that they have been in business for a minimum of 3 years providing training services similar to the training defined in the Statement of Work from the Request for Standing Offer (RFSO) closing date.</p> <p>In the case of a joint venture, at least 1 member of the joint venture must meet the minimum 3 years requirement.</p> <p>The Offeror must also provide one of the following documents: A copy of the business name Registration Certificate; or A copy of the Provincial or Territorial Business Corporation Registration Certificate; or A copy of the Federal Business Incorporation Registration Certificate.</p>
MT2	The Offeror must demonstrate that they offer a course on managing time and priorities using MS Outlook that meets the requirements of the course outline as per Appendix 1 to Annex A - Statement of Work.
MT3	The Offeror must demonstrate that they offer a course of managing projects using MS Outlook that meets the requirements of the course outline as per Appendix 1 to Annex A - Statement of Work.
MT4	The Offeror must demonstrate that they have, on at least 10 separate occasions, delivered the course proposed in MT2 (managing time and priorities using MS Outlook) after January 1, 2008.
MT5	The Offeror must demonstrate that they have, on at least 5 separate occasions, delivered the course proposed in MT3 (managing projects using MS Outlook) after January 1, 2008.
MT6	The Offeror must provide the proposed course manuals in English and French (with the exception of Matane which is only in French), in hard copy or soft copy format (CD/DVD or USB flash drive).
MT7	<p>The Offeror must have a currently active website that meet the requirement described in Sub-article 2.6 - Contractor's Website, of the Statement of Work.</p> <p>The Offeror must provide the complete URL. Canada may visit the website during the technical evaluation for validation purpose.</p>
MT8	The Offeror must provide the address of the proposed facility and demonstrate (only for NCA offer) that the facility is within the central business district surrounding PWGSC headquarters in National Capital Area as detailed in paragraph 4.3.1 of the Statement of Work. If the Offeror proposes more than one facility, the Offeror must demonstrate that all the facilities meet the requirement.

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. Offerors should provide the required certifications and related documentation in Section III of their offer.

Compliance with the certifications 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 Standing Offer

1.1 Code of Conduct and Certifications - Related documentation

By submitting an offer, the Offeror certifies, for himself and his affiliates, to be in compliance with the Code of Conduct and Certifications clause of the Standard instructions. The related documentation hereinafter mentioned will help Canada in confirming that the certifications are true. By submitting an offer, the Offeror certifies that it is aware, and that its affiliates are aware, that Canada may request additional information, certifications, consent forms and other evidentiary elements proving identity or eligibility. Canada may also verify the information provided by the Offeror, including the information relating to the acts or convictions specified herein, through independent research, use of any government resources or by contacting third parties. Canada will declare non-responsive any offer in respect of which the information requested is missing or inaccurate, or in respect of which the information contained in the certifications is found to be untrue, in any respect, by Canada. The Offeror and any of the Offeror's affiliates, will also be required to remain free and clear of any acts or convictions specified herein during the entire period of the Standing Offer and any call-ups made against the Standing Offer.

Offerors who are incorporated, including those submitting offers as a joint venture, must provide with their offer or promptly thereafter a complete list of names of all individuals who are currently directors of the Offeror. Offerors submitting offers as sole proprietorship, including those submitting offers as a joint venture, must provide the name of the owner with their offer or promptly thereafter. Offerors submitting offers as societies, firms, partnerships or associations of persons do not need to provide lists of names. If the required names have not been received by the time the evaluation of offers is completed, Canada will inform the Offeror of a time frame within which to provide the information. Failure to comply will render the offer non-responsive. Providing the required names is a mandatory requirement for issuance of a standing offer and award of a contract.

Canada may, at any time, request that an Offeror provide properly completed and Signed Consent Forms (Consent to a Criminal Record Verification form- PWGSC-TPSGC 229) (<http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/formulaires-forms-eng.html>) for any or all individuals aforementioned within the time specified. Failure to provide such Consent Forms within the time period provided will result in the offer being declared non-responsive.

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 requirements within that time period will render the offer non-responsive.

2.1 Federal Contractors Program for Employment Equity - Certification

- (a) 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 the issuance of a standing offer. If the Offeror, or, if the Offeror 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 issuance of a standing offer.

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 offers from ineligible contractors, including an offer from a joint venture that has a member who is an ineligible contractor, will be declared non-responsive.

- (b) If the Offeror does not fall within the exceptions enumerated in c.(i) or (ii) below, or does not have a valid certificate number confirming its adherence to the FCP, the Offeror 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.
- (c) The Offeror, or, if the Offeror is a joint venture the member of the joint venture, certifies its status with the FCP, as follows:

The Offeror or the member of the joint venture

- (i) () is not subject to the FCP, having a workforce of less than 100 full-time or part-time permanent employees, or temporary employees having worked 12 weeks or more in Canada;
- (ii) () is not subject to the FCP, being a regulated employer under the Employment Equity Act, S.C. 1995, c. 44;
- (iii) () is subject to the requirements of the FCP, having a workforce of 100 or more full-time or part-time permanent employees, 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;
- (iv) () is subject to 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.

(d) Certification

By submitting an offer, the Offeror certifies that the information submitted by the Offeror in response to the above requirements is accurate and complete.

2.2 Former Public Servant Certification

- (a) 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.

(b) Definitions

For the purposes of this clause,

- (i) "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:
- 1) an individual;
 - 2) an individual who has incorporated;
 - 3) a partnership made of former public servants; or
 - 4) a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.
- (ii) "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.
- (iii) "pension" means, in the context of the fee abatement formula, a pension or annual allowance paid under the Public Service Superannuation Act (PSSA), R.S., 1985, c. P-36, and any increases paid under the Supplementary Retirement Benefits Act, R.S., 1985, c. S-24 as it affects the PSSA. It does not include pensions payable under 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.

(c) Former Public Servant in Receipt of a Pension

Is the Offeror a FPS in receipt of a pension as defined above? YES () NO ()

If so, the Offeror must provide the following information:

- (i) name of former public servant;
- (ii) date of termination of employment or retirement from the Public Service.

(d) Work Force Reduction Program

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

If so, the Offeror must provide the following information:

- (i) name of former public servant;
- (ii) conditions of the lump sum payment incentive;
- (iii) date of termination of employment;
- (iv) amount of lump sum payment;
- (v) rate of pay on which lump sum payment is based;
- (vi) period of lump sum payment including start date, end date and number of weeks;
- (vii) 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 the GST or HST.

(e) Certification

By submitting an offer, the Offeror certifies that the information submitted by the Offeror in response to the above requirements is accurate and complete.

PART 6 - SECURITY, FINANCIAL AND INSURANCE REQUIREMENTS

1. Financial Capability

SACC Manual clause M9033T (2011-05-16) Financial Capability

PART 7 - 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>) 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 services to the federal government under contracts resulting from the Standing Offer.

The Offeror must provide this data in accordance with the reporting requirements detailed in Annex E. If not all the data is available, the reason must be indicated. If no services are provided during a given period, the Offeror must still provide a "NIL" response within the report.

The data must be submitted on a semiannual basis to the Standing Offer Authority.

The semiannual reporting periods are defined as follows:

1st half: April 1 to September 30;

2nd half: October 1 to March 31.

The data must be submitted to the Standing Offer Authority no later than 10 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 from date of issuance for a period of one 1 year.

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 3 additional 1-year period, under the same terms, conditions and at the rates or prices 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 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:

Suzy Bouchard
Supply Team Leader
Public Works and Government Services Canada
Acquisitions Branch
Professional Services Procurement Directorate
Place du Portage, Phase III, 10C1
11 Laurier Street, Gatineau, Québec, K1A 0S5
Telephone: 819-956-1666
Facsimile: 819-956-1432
E-mail: suzy.bouchard@tpsgc-pwgsc.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 Client Authority

The Client Authority is the representative of the Identified User and is responsible for the payment and administration of the call-up. To be identified at time of call-up issuance, if any.

4.3 Offeror's Representative

(To be identified at time of Standing Offer issuance)

5. Identified Users

The Identified User authorized to make call-ups against the Standing Offer is: Public Work and Government Services Canada.

6. Call-up Procedures

- (a) The Offeror agrees only to perform individual Call-ups made by an Identified User pursuant to this Standing Offer that do not exceed the applicable Limitation of Call-up, outlined below;
- (b) The Offeror acknowledges that no costs incurred before the receipt of a signed call-up can be charged to this Standing Offer or any call-ups made against it;
- (c) The Offeror acknowledges that the terms and conditions set out in the Resulting Contract Clauses that form part of this Standing Offer apply to every call-up made under this Standing Offer; and
- (d) The following call-up process must be followed:

The Identified User should visit the Offeror's website at _____ to view the training schedule.

The Identified Users will send a request to register to the course by sending an email with the Participant Registration Form in Annex C to _____. The email must contain the following information:

- i) Call-up number
- ii) Course Title
- iii) Course Date
- iv) Language of course
- v) Participant name(s), phone number(s) and e-mail address(es)
- vi) Billing Address
- vii) If any, Client Authority's name, phone number and email address
- viii) Total unit price and total extended price

The Offeror must send a confirmation of registration to each participant to the e-mail address specified in the call-up. The confirmation of registration must be sent within 2 working days of the e-mail request.

7. Call-up Instrument

The call-up will be issued by the Identified User using the Participant(s) Registration Form (Annex C) sent by e-mail. The Offeror will confirm the registration by sending a confirmation of registration by e-mail. The resulting call-up will be limited exclusively to the pertinent details of the requirements as provided by the Identified User to the Offeror upon registration.

8. Limitation of Call-ups

Individual call-ups against the Standing Offer must not exceed \$250,000.00 (Goods and Services Tax or Harmonized Sales Tax included).

9. 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 2035 (2012-11-19) General Conditions - Higher Complexity - Services
- e) Annex A, Statement of Work;
- f) Annex B, Basis of Payment;
- g) Annex C, Participant(s) Registration Form
- h) the Offeror's offer (*to be inserted at time of issuance*)

10. Certifications

10.1 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. 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 _____.

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

2035 (2012-11-19), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

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. Payment

4.1 Basis of Payment

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm lot price per participant, as specified in Annex B. Customs duties are included and Goods and Services Tax or Harmonized Sales Tax is extra, if applicable.

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.

4.2 Method of Payment - 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.

4.3 Payment by Credit Card

The following credit cards are accepted: _____ and _____.

4.4 SACC Manual Clauses

- a) A9116C (2007-11-30), T1204 - Information Reporting by Contractor
- b) A9117C (2007-11-30), T1204 - Direct Request by Customer Department

- c) A2000C (2006-06-16), Foreign Nationals (Canadian Contractor)
- d) C2605C (2008-05-12), Canadian Customs Duties and Sales Tax - Foreign-based Contractor

5. Invoicing Instructions

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.

The invoice must be forwarded to the address or e-mail shown in the call-up for certification and payment.

6. Insurance Requirements

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.

7. Course Cancellation and Rescheduling

Canada may cancel or reschedule a scheduled training without a fee by giving a written notice to the Contractor at least 10 calendar days prior to the course delivery date;

In the event that Canada cancels a training between 10 to 3 calendar days prior to the delivery date, the Contractor will be paid 50% of the price per participant;

In the event that Canada cancels a training 3 or fewer calendar days prior to the delivery date, the Contractor will be paid 75% of the price per participant;

In the event that Canada cancels or reschedules a scheduled training on the day of or during the training, the Contractor will be paid the price per participant.

If the Project Authority or the contractor have to cancel due to an unforeseeable or uncontrollable event (such as a strike, a virus attack, a pandemic, a power or a technical failure, etc.) no charge will be applied regardless of when the notice is received by Canada or the contractor.

8. Terms and Conditions contained in Contractor Documentation

Canada is not bound by and does not accept any conditions, express or implied, that are contained in or on the confirmation of registration or that may accompany the training material or any other documentation provided by the Contractor, in any manner, regardless of any notification to the contrary.

ANNEX A

STATEMENT OF WORK

1. Scope

Public Works and Government Services Canada (PWGSC), requires commercial off-the-shelf (COTS) courses in using Microsoft Outlook to manage time and priorities and to manage projects effectively in order to increase employee's working knowledge of Microsoft Outlook, based productivity tools. The participants are employees of PWGSC in the National Capital Area (NCA), Matane, QC and Miramichi, NB.

1.1 Objective

The objective of the courses is to address the fundamental principals of task priority and project management with Microsoft Outlook to enable the participants to communicate, manage and monitor the priorities and goals of any project. At the end of the courses, participants should have acquired the knowledge to effectively use Microsoft Outlook as their priority and project management tool.

1.2 Background

PWGSC recognizes the importance of investing in its employees. Operational needs change rapidly; therefore, all employees are encouraged to participate in ongoing professional development. The Department's learning vision supports the creation of a workplace where employees have the opportunity to be the best in their field, do work that interests them and acquire skills that enable them to perform other duties within PWGSC or in the public service.

PWGSC is responsible to offer a variety of courses using different learning methods and tools for its employees using a Course Browser which contains descriptions of courses available to PWGSC employees.

2. Requirement

2.1 General

The Contractor must provide *courses for Managing time and priorities using Microsoft Outlook 2003 and 2007* and *Managing projects using Microsoft Outlook 2003 and 2007* on an "if and when requested" basis. *The Microsoft Outlook version will be specified in each individual call-up.* The Contractor must provide the training and facility, in one or more of the following locations:

National Capital Area (NCA);
Matane, Quebec; and
Miramichi, New-Brunswick

The courses are outlined in Appendix 1 and must be provided in English and French (with the exception of Matane which is only in French).

2.2 Post-training support

The Contractor must provide post-training support, following the training session to its participants to maximize their learning outcomes and apply their new skills. Post-training support can be provided through e-mail or telephone, when requested.

2.3 Language requirement

The instructors must be able to conduct the training (read, communicate orally and in writing), in English, French or both languages, in order to deliver either the English or French training as specified in the resulting call-up.

2.4 Course Material

The course materials for all courses must be available in English and in French as specified in the resulting call-up and should be printed double sided, bound and of consistent quality (including proper syntax and grammar). Screenshots and graphics must be clear and legible.

The contractor must provide a manual to each participant. The manual will be the property of the participants at the end of the course. During the course, the instructor will follow the same manual as the one provided to participants.

2.5 Training Calendar

The contractor must provide and maintain a Training Calendar for all locations offered. The Training Calendar must:

- offer both courses at least once every three months in English (with the exception of Matane which is only in French) and at least once every four months in French;
- show at least 9 months of upcoming scheduled courses;
- be up-to-date and accurate.

2.6 Contractor's Website

The Contractor must have a website accessible to Identified Users. As a minimum, the website must contain a Training Calendar as detailed in sub-article 2.5. The website must be available in both languages (English and French) for Miramichi and NCA and in French for Matane.

Quality of the language in the English and French version of the website:

The website must be free of errors. The French and English version of the website must be consistent.

For the purpose of this requirement, errors include, as a minimum, the following:

- ♦ Accuracy including mistranslation, illogical rendering, lack of clarity and improper use of terminology
- ♦ Language including syntax (improper sentence construction), calque (expression adopted by one language from another in a more or less literally translated form), under/overtranslation and faulty usage (gallicisms and anglicisms)
- ♦ Style and adaptation including awkward rendering, word for word translation and incorrect adaptation of any of the following with respect to the end user:
 - ♦ tone, conciseness and level of language
 - ♦ Official Titles and Terminology including incorrect use of official titles, acronyms, terminology, client's usage and lack of consistency.
- ♦ Formatting including problems with layout, alignment of paragraphs and titles, consistency, incorrect hypertext links and version that does not reproduce the same formatting of tables and charts.

2.7 Estimated Level of Effort

The estimated number of participants per year for the Managing Time and Priorities using Microsoft Outlook course is:

Locations	Language	
	English	French
Miramichi	15	6
Matane	0	30
National Capital Area	100	50

The estimated level of participants per year for the Managing projects using Microsoft Outlook course is:

Locations	Language	
	English	French
Miramichi	15	6
Matane	0	20
National Capital Area	40	15

3. Tasks / Deliverables

3.1 The Contractor must:

- 3.1.1 Deliver the course(s) in French or English, as specified in the resulting call-up.
- 3.1.2 Ensure the instructor uses a lesson plan that covers the course's learning objectives and covers all topics outlined in Appendix 1.
- 13.1.3 Provide the facilities and all equipment needed for the delivery of the course.
- 3.1.4 Send a registration confirmation by e-mail to all participants identified in the resulting call-up. If the course is rescheduled or canceled, the contractor must send a notice or an updated confirmation by e-mail.
- 3.1.5 Report any problems immediately to the Identified user.
- 3.1.6 Provide the signed attendance list of participants to the Identified User specified in the call-up, 2 working days following the course via fax or e-mail.
- 3.1.7 Publish a up-to-date and accurate training calendar on the Website.

3.2 The Instructor must:

- 3.2.1 Provide the course material to each participant.
- 3.2.2 Provide administrative briefing to participants at the beginning of the course outlining the location of fire exits, washrooms, lunchroom, restaurant facilities, telephone access and course outlines.
- 3.2.3 Ensure the attendance list has been signed by all participants before the end of the course.
- 3.2.4 Provide a Course Certificate to each participant by email in a PDF format within 5 working days after completion of the course.

4. Constraints

4.1 Course Delivery

The Contractor must be available to deliver the course from Monday to Friday, from 08:30 to 16:00.

4.2 Travel

There is no travel associated with this requirement.

4.3 Training Facilities and Location

4.3.1 Location

The Contractor must provide the training in the locations specified in the resulting call-up: NCA or Matane (QC) or Miramichi (NB).

For training in NCA, the training facilities must be located in the central business district in the NCA. For the purpose of this requirement, central business district surrounding PWGSC headquarters is defined as being:

East of Island Park, Merivale (Ottawa) and Chemin de la montagne (Aylmer)

West of St-Laurent (Ottawa)

North of Hunt Club (Ottawa)

South of Boulevard St-Raymond and Boulevard Maloney (Gatineau)

4.3.2 Capacity

The Contractor must provide training accessible to participants with a physical disability.

The Contractor must make every reasonable effort to accommodate participants with physical disabilities.

The participants requiring particular accommodations due to disabilities will be identified in the resulting call-up.

4.3.3 Equipment

The facility must be equipped with workstations including a computer, name card, pencils and paper for each participants. The facility must also have a LCD projector, flip charts and markers.

The computer must have all the applicable Microsoft Outlook software licenses with Microsoft Outlook version 2003 or 2007 for each participants for the duration of the course.

4.3.4 Break and lunch facility

The Contractor's facility must have an area for coffee breaks and lunch. The room must have sufficient space to permit all students to sit at tables for breaks and lunch. As a minimum, the participants must have access to a refrigerator, a microwave and drinking water when attending the course.

In addition, the following must be within walking distance of the training facility:

At least one restaurant, cafeteria, convenience store, mini-market or any other establishments that offers beverages, sandwiches or prepackaged foods;
Public Parking; and
Public Transit.

4.3.5 Maintenance of facility prior to course delivery

The Contractor must maintain the facilities by:

- Washing and disinfecting all washrooms, floors, walls and fixtures, in accordance with Department of Health regulations;
- Replenishing paper towels, toilet tissue and soap containers in all washrooms;
- Emptying all waste baskets in the classroom, common rest area(s) (lounge) and all washrooms.

4.3.6 Telephone access

The participant must have access to a telephone for local calls, at no charge.

The facility must have a telephone number allowing to reach, on urgent basis, the instructor or any participant attending the course. The Contractor must ensure that this telephone is answered during training hours.

APPENDIX 1 TO ANNEX A

The course outlines provided by the supplier needs to include those of PWGSC but are not limited to the exact terms used below.

1- Title of Course: Manage time and priorities using Microsoft Outlook

Prerequisite: NA

Other Eligibility: NA

Competencies: NA

Duration: 1 day

Target Audience: PWGSC employees who currently use MS Outlook, and are not optimizing their use of this software.

Delivery approach: One-day instructor-led course with hands-on activities.

Course objectives:

Provide participants with the knowledge, skills and competencies to effectively use Microsoft Outlook as a work organization and management tool. This course will help participants enhance their personal and team productivity, while giving them more control over activities and information.

Course outlines:

- Major Outlook tools: calendars, tasks, inbox, contacts, notes, journal.

- Set up and configure the Outlook Interface for managing tasks

- Organizing emails
- Deleting junk email and avoiding SPAM
- Tips on sending and tracking emails
- Labelling email messages (i.e. a colour coding system or similar)
- Changing emails into calendar events
- Creating contacts from email data
- Creating tasks from emails
- Delegating tasks from an emails information
- Formatting sub folders to manage messages
- Generating custom inbox rules to unclutter your emails

- Organizing tasks and activities

- Identifying daily received and sent emails for revision
- Prioritizing activities
- Learning shortcuts to simplify your workflow
- Creating folders to manage categories
- Setting reminders through the Tasks tab
- Personalizing the tasks tab viewer
- Categorizing tasks
- Utilizing Outlook as an organizer of daily duties and responsibilities

- Managing the Calendar

- Time management for all priorities, tasks and workflows
- Organizing meetings
- Browsing multiple calendars
- Recurring Appointments and Events
- Sharing your Calendar
- Adding documentation to events
- Delegating tasks and best practices
- Managing Contacts

2- Title of Course: Manage projects using Microsoft Outlook

Prerequisite: Manage Time and priorities with Microsoft Outlook

Other Eligibility: NA

Competencies: NA

Estimated duration: 1 day

Target Audience: PWGSC employees who wish to manage projects with Ms Outlook.

Delivery approach: One-day instructor-led course with hands-on activities.

Course objectives:

Target audience are employees who wish to manage small to medium size projects without using any Project Management software. Provide the participants with the knowledge, skills and tools to effectively manage projects within the familiar interface of Microsoft Outlook. Manage Project work in one place to enhance the participants' ability to stay in control of follow-ups, commitments and important deadlines.

Course outlines:

- Understanding the world of Project Management
- Understanding which tools to use for project planning using Outlook
 - Adding new projects
 - Managing Project Tasks
 - Managing your project data within the project folder
 - Personalizing how the information is displayed
 - Linking resources to your project
 - Organizing all communication within a specific project
 - Creating project tasks from email's
 - Utilizing custom task views
 - Creating custom fields
- Learning how to track communication in your project

-
- Organizing all project emails in your project file
 - Assigning categories to emails sent and received for a specific project
 - Easing communication with task delegators and delegates
 - Sending manual status reports for a specific project

- Tracking & Reporting on project activities

- Visualizing your project task views to report on your tasks
- Updating the status of your project
- Searching Outlook to retrieve all items associated with your project
- Exporting tasks to other MS Suite applications (Word, Excel and PowerPoint)

ANNEX B BASIS OF PAYMENT

Firm Lot Price per participant - (Miramichi, Matane or NCR)

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract , the Contractor will be paid the firm lot price per participant as per Table 1 below.

Table 1

Item	Course Title	Firm lot price per participant			
		Initial Period SO Period	Option Period 1	Option Period 2	Option Period 3
1	Managing Time and Priorities using Microsoft Outlook				
2	Managing projects using Microsoft Outlook				

Solicitation No. - N° de l'invitation

EN519-130108/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

124zh

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

20130108

File No. - N° du dossier

124zhEN519-130108

CCC No./N° CCC - FMS No/ N° VME

ANNEX C**PARTICIPANT REGISTRATION FORM - CALL-UP****STANDING OFFER EN519-130108/00_**

Call-up Number:	
PARTICIPANT(S) INFORMATION	
Participant Name(s), Phone Number and Email Address:	
Billing Address And Client Authority's name, phone and e-mail, if any:	
COURSE INFORMATION	
Course Title:	<input type="checkbox"/> Managing time and priorities using Microsoft Outlook, version : _____ <input type="checkbox"/> Managing projects using Microsoft Outlook, version : _____
Course date:	
Language of course	<input type="checkbox"/> English <input type="checkbox"/> French
Unit price:	
Total Extended Price including (GST/HST)	

Solicitation No. - N° de l'invitation

EN519-130108/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

124zh

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

File No. - N° du dossier

CCC No./N° CCC - FMS No/ N° VME

20130108

124zhEN519-130108


ANNEXE D

SEMIANNUAL USAGE REPORT

(See attachment)

Annex D

I. Instructions

	<p>Public Works and Government Services Canada</p>	<p>Travaux publics et Services gouvernementaux Canada</p>	ANNEX D
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Semiannual Usage Report

Introduction
The Government of Canada (GC) requires the Offeror to provide the following a Semiannual Usage Report (SUR) to the Standing Offer Authority on a semiannual basis.

Response Due Date
Your cooperation in returning the completed SUR by the appropriate date is **MANDATORY**.

Period	Period to be Covered	Due on or before
1st	April 1 to September 30	October 10
2nd	October 1 to March 31	April 10

Returning the Completed SUR
Please e-mail the completed SUR to: suzy.bouchard@tpsgc-pwgsc.gc.ca
Type the words "**SUR Outlook Training**" in the subject line of your e-mail.

Complete All Fields
Offeror should complete all applicable portions of the SUR documents - including the Company Profile, Information sheet pertaining to services provided to PWGSC.

Provide Direct Responses to Fields
Please do not substitute brochures, catalogues or annual reports in lieu of answers to our questions.

Currency
Please, state all monetary values in Canadian dollars (CDN).

Confidentiality
PWGSC will keep your company's response confidential.

Changing the Format
Offeror is asked not to modify the format of this SUR.

Offeror's Representative (or delegated representative)
PWGSC considers the individual named under Offeror's Representatives of the Standing Offer to be the Offeror's primary source of communication. Should this individual not be available at the date of the SUR submission, an alternate contact should be included with your SUR using the template provided under tab II. Company Profile

Questions
Should you need further clarification, please forward your question by e-mail to the following address: suzy.bouchard@tpsgc-pwgsc.gc.ca

Field Descriptions
SO Semiannual Usage Report (SUR)
Field Information

Field	Description
Call-up no.	Unique number for the call-up, as identified in confirmation number.
Location of the Training	Matane, Miramishi or NCR
Name of the Client Authority	The name of the Client Authority
E-mail of the Client Authority	E-mail of the Client Authority
Call-up Date	Date the call-up was issued
Number of Participants	Number of participants registered for the training
Training Date	Date the training
Call-up Value	The value of the call-up (GST/HST inc), as identified on page 1 of the call-up

General Instructions

Annex D
II. Company Profile

Semiannual Usage Report

Company Profile

(1) Please complete your company details in the spaces below:

Company name:

SO No.:

Web site:

PBN:

Business address:

City:

State / Province:

Postal code:

Country:

Phone No.:

Fax No.:

(2) Complete the details of the person who is the Primary contact regarding this SUR:

Contact name:

Title:

Business address:

City:

State / Province:

Postal code:

Country:

Phone No.:

Fax No.:

E-mail:

(3) If applicable, provide details for the Alternate contact regarding this SUR:

Contact name:

Title:

Business address:

City:

State / Province:

Postal code:

Country:

Phone No.:

Fax No.:

E-mail:

Company Name



Public Works and
Government Services
Canada

Travaux publics et
Services gouvernementaux
Canada

Annex D
Information Sheet

Semiannual Usage Report Instructions

Please provide the information requested below for all Training Contracts your firm provided to the Government of Canada for the appropriate semiannual period.

Semi-Annual Period	Period to be Covered	Due on or before
1st	April 1 to September 30	October 10
2nd	October 1 to March 31	April 10

Indicate Reporting Period (Period and Year)

**Outlook Training Services Information
Spreadsheet**

SO EN519-130108

Total Number of Call-ups Year-to-date	(Insert Number)
Total \$ Value of Call-ups Year-to-date	(Insert \$ Value)

Call-up Number	Location of the Training	Name of Client Authority	E-mail of Client Authority	Call-up Date	Number of Participants	Training Date (dd-mm-yy)	Call-up Value
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2							
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