

**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 PROPOSAL  
DEMANDE DE PROPOSITION**

**Proposal To: Public Works and Government  
Services Canada**

We hereby offer to sell to Her Majesty the Queen in right of Canada, in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the goods, services, and construction listed herein and on any attached sheets at the price(s) set out therefor.

**Proposition aux: Travaux Publics et Services  
Gouvernementaux Canada**

Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées ou incluses par référence dans la présente et aux annexes ci-jointes, les biens, services et construction énumérés ici sur toute feuille ci-annexée, au(x) prix indiqué(s).

**Comments - Commentaires**

<b>Title - Sujet</b> Training Facilitator	
<b>Solicitation No. - N° de l'invitation</b> EP155-131327/A	<b>Date</b> 2012-10-12
<b>Client Reference No. - N° de référence du client</b> 20131327	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$ZH-121-24982	
<b>File No. - N° de dossier</b> 121zh.EP155-131327	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2012-10-29</b>	
<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Daylight Saving Time EDT	
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Steele, Brian	<b>Buyer Id - Id de l'acheteur</b> 121zh
<b>Telephone No. - N° de téléphone</b> (819) 956-3569 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> DEPARTMENT OF PUBLIC WORKS AND GOVERNMENT SERVICES CANADA PLACE DES EXPLORATEURS 5TH FL. 191 PROMENADE DU PORTAGE Gatineau Quebec K1A0S5 Canada	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

**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

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

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This requirement contains a security requirement - See Part 6.

## **PART 1 - GENERAL INFORMATION**

### **1. Introduction**

The bid solicitation is divided into seven parts plus attachments and annexes, as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation ;
- Part 3 Bid Preparation Instructions: provides bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, if applicable, and the basis of selection;
- Part 5 Certifications: includes the certifications to be provided;
- Part 6 Security Requirements: includes specific requirements that must be addressed by bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Attachments include the List of Suppliers, Pricing Schedule, Technical Criteria, and Certifications Precedent to Contract Award.

The Annexes include the Statement of Work, Basis of Payment, Security Requirements Check List, Task Authorization Form, Sample MS Office Excel Spreadsheet for Periodic Usage Reports - Contracts with TAs.

The list of suppliers being invited to bid on this bid solicitation is provided as Attachment 1 to Part 1. This list will not be updated if additional suppliers request copies of the bid solicitation.

### **2. Summary**

- a. The Real Property Branch of Public Works and Government Services Canada requires the services of Intermediate Training Facilitator to deliver Workplace 2.0 Fit-up Standards training sessions required for the implementation of Workplace Modernization. These services will be procured via Learning Services Supply Arrangement (E60ZH-070003).
- b. Training Facilitators will be required deliver training in various locations throughout the National Capital Region. Travel to some regions (1 major city per region) may be required (Halifax, Edmonton, Toronto, Montreal and Vancouver).
- c. The period of the resulting contract will be from date of contract to March 31, 2013 with two (2) one (1) year option periods to extend the term of the contract with the same conditions.

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### **3. Debriefings**

- a. After contract award, bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within 15 working days of receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone or in person.

## **ATTACHMENT 1 to PART 1 LIST OF SUPPLIERS**

- 175213 Canada Inc
- 4058721 Canada Ltd
- Andrew Lawson
- Blue Drop Inc.
- CAE Inc
- Calian Ltd, Instrux Media Corp. In joint venture
- Calian Ltd.
- CANADEM
- CTE Certified Technical Education Solutions Inc.
- Groupe Intersol Group Ltee.
- Itplanit Services Corp.
- Knightsbridge Human Capital Management Inc.
- Lansdowne Technologies Inc.
- Modis Canada Inc.
- Naut'sa mawt Resources Group Inc./Knightsbridge
- TEMAS Management Inc
- The Algonquin College of Applied Arts and Technology
- The VCAN Group Inc., D.J. Films-Multimedia, Inc., In joint venture
- Ultimate Progress Leadership Group Inc.
- Valcom Consulting Group Inc.

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## PART 2 - BIDDER INSTRUCTIONS

### 1. Standard Instructions, Clauses and Conditions

- a. All instructions, clauses and conditions identified in the bid solicitation 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.
- b. Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.
- c. The 2003 (2012-03-02), Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.
- d. Subsection 5.4 of 2003, Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: sixty (60) days

Insert: ninety (90) calendar days.

#### 1.1 SACC Manual Clauses

- a. A7035T(2007-05-25), List of Proposed Subcontractors

### 2. Submission of Bids

- a. Bids 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 bid solicitation. Bids transmitted to PWGSC by electronic mail will not be accepted.
- b. Due to the nature of the bid solicitation, bids transmitted by facsimile to PWGSC will not be accepted.

### 3. Enquiries - Bid Solicitation

- a. All enquiries must be submitted in writing to the Contracting Authority no later than five (5) calendar days before the bid closing date. Enquiries received after that time may not be answered.
- b. Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by bidders 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 the Bidder do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all bidders. Enquiries not submitted in a form that can be distributed to all bidders may not be answered by Canada.

### 4. Applicable Laws

- a. Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario, Canada.

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- b. Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, 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 bidders.

## **5. Basis for Canada's Ownership of Intellectual Property**

- a. Public Works and Government Services Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, on the following grounds:

where the material developed or produced consists of material subject to copyright, with the exception of computer software and all documentation pertaining to that software.

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## **PART 3 - BID PREPARATION INSTRUCTIONS**

### **1. Bid Preparation Instructions**

- a. Canada requests that bidders provide their bid in separately bound sections as follows:

Section I: Technical Bid ( 4 hard copies );  
Section II: Financial Bid ( 1 hard copy ); and  
Section III: Certifications ( 1 hard copy ).

- b. Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.
- c. Canada requests that bidders follow the format instructions described below in the preparation of their bid:
- (i) use 8.5 x 11 inch (216 mm x 279 mm) paper; and
  - (ii) use a numbering system that corresponds to the bid solicitation.
- d. 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> ).
- e. To assist Canada in reaching its objectives, bidders are encouraged to :
- (i) use paper containing fibre certified as originating from a sustainably-managed forest and/or containing minimum 30% recycled content; and
  - (ii) 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.

#### **1.1 Section I: Technical Bid**

- a. In their technical bid, bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability in a thorough, concise and clear manner for carrying out the work.
- b. The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.
- c. Part 4, Evaluation Procedures, contains additional instructions that bidders should consider when preparing their technical bid.

## 1.2 Section II: Financial Bid

- a. Bidders must submit their financial bid in Canadian funds and in accordance with the pricing schedule detailed in Attachment 1 to Part 3. The total amount of Goods and Services Tax (GST) or Harmonized Sales Tax (HST) must be shown separately, as applicable.
- b. Bidders must submit their prices FOB destination; Canadian customs duties and excise taxes included, as applicable; and GST or HST excluded.
- c. When preparing their financial bid, bidders should review the basis of payment in Annex B and clause 1.2, Financial Evaluation, of Part 4.
- d. The prices included in the pricing schedule detailed in Attachment 1 to Part 3 exclude the total estimated cost of all travel and living expenses that may need to be incurred for Work described in Part 7, Resulting Contract Clauses, of the bid solicitation required to be performed outside:

### (i) NATIONAL CAPITAL REGION

- 1) Work performed within the National Capital Region (NCR). The NCR is defined in the *National Capital Act*, R.S.C. 1985, c. N-4, S.2. *The National Capital Act* is available on the Justice Website: <http://laws.justice.gc.ca/eng/acts/N-4/> ;
- 2) Any travel between the Contractor's place of business and the NCR; and
- 3) Any relocation of resources required to satisfy the terms of the Contract. These expenses are included in the all inclusive fixed price per module.

### (ii) HALIFAX METROPOLITAN AREA

- 1) Work performed within the Halifax Metropolitan Area. The Halifax Metropolitan Area is defined as: bounded on the west by a north-south line running from Kentville to Bridgewater, on the north by a west-east line running from Kentville to Truro, on the east by a north-south line from Truro to Tangier, on the south by the Atlantic Ocean;
- 2) Any travel between the Contractor's place of business and the Halifax Metropolitan Area; and
- 3) Any relocation of resources required to satisfy the terms of the Contract. These expenses are included in the all inclusive fixed price per module.

### (iii) EDMONTON METROPOLITAN AREA

- 1) Work performed within the Edmonton Metropolitan Area. The Edmonton metropolitan Area is defined as: bounded on the west by a north-south line running from Westlock to Gainford, on the north by a west-east line running from Westlock to Vegreville, on the east by a north-south line from Vegreville to Ponoka, on the south by a east-west line from Ponoka to Gainford;
- 2) Any travel between the Contractor's place of business and the Edmonton Metropolitan Area; and
- 3) Any relocation of resources required to satisfy the terms of the Contract. These expenses are included in the all inclusive fixed price per module.

### (iv) TORONTO METROPOLITAN AREA

- 1) Work performed within the Toronto Metropolitan Area. The Toronto Metropolitan Area is defined as: bounded on the west by a south-north line running from Burlington to Caledon, on the north by a west-east line running from Caledon to Newmarket, on the east by a north-south line from Newmarket to Oshawa, on the south by Lake Ontario;
- 2) Any travel between the Contractor's place of business and the Toronto Metropolitan Area; and
- 3) Any relocation of resources required to satisfy the terms of the Contract. These expenses are included in the all inclusive fixed price per module.

#### **(v) MONTREAL METROPOLITAN AREA**

- 1) Work performed within the Montreal Metropolitan Area. The Montreal Metropolitan Area is defined as: bounded on the west by the Ontario border and a north-south line running from Ste-Agathe-des-Monts to Carillon, as far north as Louiseville, on the east by a north-south line from Louiseville, passing by Drummondville, to Bromont, on the south by the United States of America (USA) border;
- 2) Any travel between the Contractor's place of business and the Montreal Metropolitan Area; and
- 3) Any relocation of resources required to satisfy the terms of the Contract. These expenses are included in the all inclusive fixed price per module.

#### **(vi) VANCOUVER METROPOLITAN AREA**

- 1) Work performed within the Vancouver Metropolitan Area. The Vancouver Metropolitan Area is defined as: bounded on the west by the Strait of Georgia, on the south by the USA border and by a north-south line from Lions Bay to Abbotsford;
- 2) Any travel between the Contractor's place of business and the Vancouver Metropolitan Area; and
- 3) Any relocation of resources required to satisfy the terms of the Contract. These expenses are included in the all inclusive fixed price per module.

e. Bidders should include the following information in their financial bid:

- (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 Bidder to enter into communications with Canada with regards to:

- 1) their bid; and
- 2) any contract that may result from their bid.

### **1.3 SACC Manual Clauses**

a. C3011T(2010-01-11), Exchange Rate Fluctuation

### **1.4 Section III: Certifications**

a. In Section III, Bidders should include the certifications required under Part 5.

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## ATTACHMENT 1 to PART 3 PRICING SCHEDULE

The Bidder should complete this pricing schedule and include it in its financial bid once completed. As a minimum, the Bidder must respond to this pricing schedule by including in its financial bid for each of the periods specified below its quoted all inclusive fixed price per module (in Cdn \$) for each of the modules identified

The inclusion of volumetric data in this document does not represent a commitment by Canada that Canada's future usage of the services described in the bid solicitation will be consistent with this data.

The prices specified below, when quoted by the Bidder, includes the total estimated cost of all travel and living expenses that may need to be incurred for:

### a. NATIONAL CAPITAL REGION

- 1) Work performed within the National Capital Region (NCR). The NCR is defined in the *National Capital Act*, R.S.C. 1985, c. N-4, S.2. *The National Capital Act* is available on the Justice Website: <http://laws.justice.gc.ca/eng/acts/N-4/> ;
- 2) Any travel between the Contractor's place of business and the NCR; and
- 3) Any relocation of resources required to satisfy the terms of the Contract. These expenses are included in the all inclusive fixed price per module.

### b. HALIFAX METROPOLITAN AREA

- 1) Work performed within the Halifax Metropolitan Area. The Halifax Metropolitan Area is defined as: bounded on the west by a north-south line running from Kentville to Bridgewater, on the north by a west-east line running from Kentville to Truro, on the east by a line north-south line from Truro to Tangier, on the south by the Atlantic Ocean;
- 2) Any travel between the Contractor's place of business and the Halifax Metropolitan Area; and
- 3) Any relocation of resources required to satisfy the terms of the Contract. These expenses are included in the all inclusive fixed price per module.

### c. EDMONTON METROPOLITAN AREA

- 1) Work performed within the Edmonton Metropolitan Area. The Edmonton metropolitan Area is defined as: bounded on the west by a north-south line running from Westlock to Gainford, on the north by a west-east line running from Westlock to Vegreville, on the east by north-south line from Vegreville to Ponoka, on the south by a east-west line from Ponoka to Gainford;
- 2) Any travel between the Contractor's place of business and the Edmonton Metropolitan Area; and
- 3) Any relocation of resources required to satisfy the terms of the Contract. These expenses are included in the all inclusive fixed price per module.

### d. TORONTO METROPOLITAN AREA

- 1) Work performed within the Toronto Metropolitan Area. The Toronto Metropolitan Area is defined as: bounded on the west by a south-north line running from Burlington to Caledon, on the north by a west-east line running from Caledon to Newmarket, on the east by a north-south line from Newmarket to Oshawa, on the south by Lake Ontario;
- 2) Any travel between the Contractor's place of business and the Toronto Metropolitan Area; and

- 
- 3) Any relocation of resources required to satisfy the terms of the Contract. These expenses are included in the all inclusive fixed price per module.

**e. MONTREAL METROPOLITAN AREA**

- 1) Work performed within the Montreal Metropolitan Area. The Montreal Metropolitan Area is defined as: bounded on the west by the Ontario border and a north-south line running from Ste-Agathe-des-Monts to Carillon, as far north as Louiseville, on the east by a north-south line from Louiseville, passing by Drummondville, to Bromont, on the south by the United States of America (USA) border;
- 2) Any travel between the Contractor's place of business and the Montreal Metropolitan Area; and
- 3) Any relocation of resources required to satisfy the terms of the Contract. These expenses are included in the all inclusive fixed price per module.

**f. VANCOUVER METROPOLITAN AREA**

- 1) Work performed within the Vancouver Metropolitan Area. The Vancouver Metropolitan Area is defined as: bounded on the west by the Strait of Georgia, on the south by the USA border and by a north-south line from Lions Bay to Abbotsford;
- 2) Any travel between the Contractor's place of business and the Vancouver Metropolitan Area; and
- 3) Any relocation of resources required to satisfy the terms of the Contract. These expenses are included in the all inclusive fixed price per module.

**See Attached Pricing Schedule**

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## **PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION**

### **1. Evaluation Procedures**

- a. Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical evaluation criteria.
- b. An evaluation team composed of representatives of Canada will evaluate the bids.

#### **1.1 Technical Evaluation**

##### **1.1.1 Mandatory Technical Criteria**

- a. Refer to Attachment 1 to Part 4.

#### **1.2 Financial Evaluation**

- a. The volumetric data included in the pricing schedule detailed in Attachment 1 to Part 3 are provided for bid evaluated price determination purposes only. They are not to be considered as a contract guarantee.
- b. For bid evaluation and contractor selection purposes only, the evaluated price of a bid will be determined in accordance with the Pricing Schedule detailed in Attachment 1 to Part 3.

### **2. Basis of Selection**

#### **2.1 Basis of Selection - Lowest Evaluated Price**

- a. A bid must comply with the requirements of the bid solicitation and meet all mandatory evaluation criteria to be declared responsive.
- b. The responsive bid with the lowest evaluated price will be recommended for award of a contract

## ATTACHMENT 1 to PART 4 TECHNICAL CRITERIA

### 1. Mandatory Technical Criteria

- a. The bid must meet the mandatory technical criteria specified below. The Bidder must provide the necessary documentation to support compliance with this requirement.
- b. Bids which fail to meet the mandatory technical criteria will be declared non-responsive. Each mandatory technical criterion should be addressed separately.

<b>Mandatory Technical Criteria (MT)</b>	
<b>Number</b>	<b>Mandatory Technical Criterion</b>
<b>MT1</b>	<p>The Bidder must propose the following Intermediate Training Facilitators:</p> <p>a. Two (2) Bilingual Intermediate Training Facilitators</p> <p>OR</p> <p>a. Two (2) English Intermediate Training Facilitators; and b. Two (2) French Intermediate Training Facilitators;</p> <p>OR</p> <p>a. One (1) English Intermediate Training Facilitator; and b. One (1) French Intermediate Training Facilitator; and c. One (1) Bilingual Intermediate Training Facilitator</p> <p><i>The Bidder cannot propose the same named resource twice.</i></p>
<b>MT2</b>	<p>Each proposed Intermediate Training Facilitator in MT1 must have a minimum of sixty (60) training days within the last three (3) years in facilitating in the identified subject area.</p> <p>The subject area is defined as Real Property accommodation or Real Property fit-up* standards (*Fit-up means alterations and improvements to the base building and buildings systems, including demolition, to prepare the accommodation for occupancy).</p>

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## **PART 5 - CERTIFICATIONS**

- a. Bidders must provide the required certifications to be awarded a contract. Canada will declare a bid non-responsive if the required certifications are not completed and submitted as requested. Bidders should provide the required certifications in Section III of their bid.
- b. Compliance with the certifications bidders provide to Canada is subject to verification by Canada during the bid evaluation period (before award of a contract) and after award of a contract. The Contracting Authority will have the right to ask for additional information to verify bidders' compliance with the certifications before award of a contract. The bid will be declared non-responsive if any certification made by the Bidder is untrue, whether made knowingly or unknowingly. Failure to comply with the certifications or to comply with the request of the Contracting Authority for additional information will also render the bid non-responsive.

### **1. Certifications Precedent to Contract Award**

- a. The certifications included in Attachment 1 to Part 5, Certifications Precedent to Contract Award, should be completed and submitted with the bid, but may be submitted afterwards. If any of these required certifications is not completed and submitted as requested, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.

## ATTACHMENT 1 to PART 5 CERTIFICATIONS PRECEDENT TO CONTRACT AWARD

### 1. Federal Contractors Program

#### 1.1. Federal Contractors Program - over \$25,000 and below \$200,000

Suppliers who are subject to the Federal Contractors Program (FCP) and have been declared ineligible contractors by Human Resources and Skills Development Canada (HRSDC) are no longer eligible to receive federal 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.

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 permanent full-time, permanent part-time 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 permanent full-time, permanent part-time 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;
- d. ( ) has not been declared an ineligible contractor by HRSDC, and has a valid certificate number as follows: \_\_\_\_\_.

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

#### 1.2 Former Public Servants Certification

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 spending public funds. In order to comply with Treasury Board policies and directives on contracts with FPS, bidders 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 Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"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 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**

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

If so, the Bidder must provide the following information:

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

#### **Work Force Reduction Program**

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

If so, the Bidder 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; and
- 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 Goods and Services Tax or Harmonized Sales Tax.

#### **Certification**

By submitting a bid, the Bidder certifies that the information submitted by the Bidder in response to the above requirements is accurate and complete.

### **1.3 Status and Availability of Resources**

The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting 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 Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder 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 Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability.

### **1.4 Education and Experience**

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

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## **PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS**

### **1. Security Requirement**

- a. Before award of a contract, the following conditions must be met:
  - 1) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
  - 2) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in Part 7 - Resulting Contract Clauses; and
  - 3) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.
- b. Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.
- c. For additional information on security requirements, bidders should consult the "Security Requirements for PWGSC Bid Solicitations - Instructions for Bidders" (<http://www.tpsgc-pwgsc.gc.ca/app-acq/lc-pl/lc-pl-eng.html#a31>) document on the Departmental Standard Procurement Documents Website.

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## PART 7 - RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of any contract resulting from the bid solicitation.

### 1. Statement of Work

- a. The Contractor must perform the Work in accordance with the Statement of Work in Annex A.

#### 1.1 Task Authorization

- a. Work described at Annex A, Statement of Work, will be performed under the Contract on an "as and when requested basis".
- b. With respect to the Work mentioned under paragraph a. of this clause,
- c. an obligation will come into force only when the Contractor receives a Task Authorization (TA), inclusive of any revisions, authorized and issued in accordance with this clause, and only to the extent designated in the authorized TA;
- d. the TA Authority and limit will be determined in accordance with paragraph 1.1.1 of this clause;
- e. the Contractor must not commence work until a TA, inclusive of any revisions, has been authorized and issued in accordance with the Contract. The Contractor acknowledges that work performed before a TA, inclusive of any revisions, has been authorized and issued in accordance with the Contract will be done at the Contractor's own risk and expense;
- f. the task description, inclusive of any revisions, included in an authorized TA must fall within the scope of the Statement of Work, in Annex A; and
- g. the TA, inclusive of any revisions, will be authorized under the Contract through the use of Annex D, Task Authorization Form. An authorized TA is a completed Annex D signed by the TA Authority.

##### 1.1.1 TA Authority and Limit

- a. The Project Authority may authorize individual TAs inclusive of any revisions up to a limit of \$25,000.00, GST or HST extra. Any TA the total value of which would exceed that limit or any revision to a previously authorized TA that would increase the TA total value above that limit must be authorized by the Contracting Authority before issuance to the Contractor.
- b. The authority specified under paragraph a. of this clause is granted subject to the sum specified in the Contract under clause 6.2, Limitation of Expenditure - Cumulative Total of all authorized TAs, not being exceeded.

##### 1.1.2 TA Process

- a. For each task or revision of a previously authorized task, the Project Authority will provide the Contractor with a request to perform a task prepared using Annex D, Task Authorization Form, containing as a minimum:

- 1) the task or revised task description of the Work required, including:

- i. the details of the activities or revised activities to be performed;
  - ii. a description of the deliverables or revised deliverables to be submitted; and
  - iii. a schedule or revised schedule indicating completion dates for the major activities or submission dates for the deliverables, or both, as applicable;
  - iv. the Contract security requirements applicable to the task or revised task;
  - v. the Contract basis of payment applicable to the task or revised task; and
  - vi. the Contract method(s) of payment applicable to the task or revised task
- b. Within three (3) calendar days of its receipt of the request, the Contractor must provide the Project Authority with a signed and dated response prepared and submitted using the TA form received from the Project Authority, containing as a minimum:
- 1) the total estimated cost proposed for performing the task or, as applicable, revised task;
  - 2) a breakdown of that cost in accordance with Annex B, Basis of Payment;

### 1.1.3 TA Authorization

- a. The TA Authority will authorize the TA based on:
- 1) the request submitted to the Contractor pursuant to paragraph 1.1.2 a. above;
  - 2) the Contractor's response received, submitted pursuant to paragraph 1.1.2 b. above; and
  - 3) the agreed total estimated cost for performing the task or, as applicable, revised task
- b. The authorized TA will be issued to the Contractor by email (as an email attachment in PDF format).

### 1.1.4 Minimum Work Guarantee - All the Work - Authorized TAs

- a. "Maximum Contract Value" means the sum specified in Contract clause 6.2, Limitation of Expenditure - Cumulative Total of All Authorized TAs; and
- b. "Minimum Contract Value" means a fixed amount of \$8,000.00
- c. Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with paragraph b. of this clause. In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract period to perform the Work. Canada's maximum liability for Work requested in authorized TAs, performed by the Contractor and accepted by Canada must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.
- d. In the event that Canada does not request Work in the amount of the Minimum Contract Value during the period of the Contract, Canada must pay the Contractor the difference between the Minimum Contract Value and the cost of the Work requested in authorized TAs, performed by the Contractor and accepted by Canada.
- e. Canada will have no obligation to the Contractor under this clause if Canada terminates the Contract in whole or in part for default.

### 1.1.5 Periodic Usage Reports - Contracts with TAs

- a. The Contractor must compile and maintain detailed and current data on its performance of Work required and requested under TAs (inclusive of any revisions) authorized and issued under the Contract.
- b. No later than 15 calendar days after the end of each of the reporting periods below, the Contractor must submit to the Contracting Authority and Project Authority a periodic usage report containing, in an electronic spreadsheet (such as MSOffice Excel), the data elements specified in paragraphs e. and f. below in the order they are presented. Where at the end of a reporting period, no changes are required to be made to the data contained in the periodic usage report submitted for the previous period, the Contractor must submit a "NIL" report to the Contracting Authority and Project Authority.
- c. The reporting periods are defined as follows:
- 1st quarter: April 1 to June 30;  
 2nd quarter: July 1 to September 30;  
 3rd quarter: October 1 to December 31; and  
 4th quarter: January 1 to March 31.
- d. A sample MSOffice spreadsheet containing the data elements contained in paragraphs e. and f. is provided in Annex E.
- e. For each TA authorized and issued under the Contract, the data must contain the following data elements in the order presented:
- the TA number appearing on the TA form;
  - the date the task was authorized appearing on the TA form;
  - the total estimated cost of the task (GST/HSTextra) before any revisions appearing on the TA form;
  - the following information appearing on the TA form must be included for each authorized revision, starting with revision 1, than 2, etc:
    - the TA revision number;
    - the date the revision to the task was authorized;
    - the authorized increase or decrease (GST/HSTextra);
    - the total estimated cost of the task (GST/HST extra) after authorization of the revision;
    - the total cost incurred for the task (as last revised, as applicable), GST/HST extra;
  - the total cost incurred and invoiced for the task (as last revised,as applicable), GST/HST extra;
  - the GST/HST total amount invoiced;
  - the total amount paid, GST/HST included;
  - the start and completion date of the task (as last revised, as applicable); and
  - the active status (i.e., the percentage of the work completed) of the task (as last revised, as applicable) with an explanation (as applicable).
- f. For all TAs authorized and issued under the Contract, the data must contain the following data elements in the order presented:
- the sum (GST/HSTextra) specified in clause 6.2, Limitation of Expenditure - Cumulative Total of all Authorized TAs of the Contract (as last amended);
  - the total cost incurred for all authorized tasks inclusive of any revisions, GST/HST extra;
  - the total cost incurred and invoiced for all authorized tasks inclusive of any revisions, GST/HST extra;
  - the GST/HST total amount invoiced for all authorized tasks inclusive of any revisions; and

- the total amount paid for all authorized tasks inclusive of any revisions, GST/HST extra.

## 2. Standard Clauses and Conditions

- All clauses and conditions identified in the Contract 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

- 2035 (2012-07-16), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

### 2.2 Specific Person(s)

- The Contractor must provide the services of the following person(s) to perform the Work as stated in the Contract: \_\_\_\_\_

## 3. Security Requirement

- The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
- The Contractor/Offeror personnel requiring access to PROTECTED information, assets or sensitive work site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by CISD/PWGSC.
- The Contractor/Offeror MUST NOT remove any PROTECTED information or assets from the identified work site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction.
- Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
- The Contractor/Offeror must comply with the provisions of the:
  - 1) Security Requirements Check List and security guide (if applicable), attached at Annex C;
  - 2) Industrial Security Manual (Latest Edition).

## 4. Term of Contract

### 4.1 Period of the Contract

- The period of the Contract is from date of Contract to March 31, 2013 inclusive

### 4.2 Option to Extend the Contract

- The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to two (2) additional one (1) year period(s) under the same conditions. The Contractor agrees that,

during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

- b. Canada may exercise this option at any time by sending a written notice to the Contractor at least thirty (30) calendar days before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

## 5. Authorities

### 5.1 Contracting Authority

- a. The Contracting Authority for the Contract is:

Name: Brian Steele  
 Title: Supply Specialist  
 Public Works and Government Services Canada  
 Acquisitions Branch  
 Directorate: Professional Services Procurement Directorate  
 Address: 11 Laurier Street  
 Gatineau QC  
 K1A 0S5

Telephone: 819-956-3569  
 Facsimile: 819-956-2675  
 E-mail address: brian.steele@tpsgc-pwgsc.gc.ca

- b. The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

### 5.2 Project Authority

- a. The Project Authority for the Contract is:

Name: \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Organization: \_\_\_\_\_  
 Address: \_\_\_\_\_

Telephone: \_\_\_\_ - \_\_\_\_ - \_\_\_\_  
 Facsimile: \_\_\_\_ - \_\_\_\_ - \_\_\_\_  
 E-mail address: \_\_\_\_\_

- b. The Project Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Project Authority; however, the Project Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

### 5.3 Contractor's Representative

a. The Contractor's Representative for the Contract is:

Name: \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Organization: \_\_\_\_\_  
 Address: \_\_\_\_\_  
  
 Telephone: \_\_\_ - \_\_\_ - \_\_\_\_  
 Facsimile: \_\_\_ - \_\_\_ - \_\_\_\_  
 E-mail address: \_\_\_\_\_

**6. Payment**

**6.1 Basis of Payment**

**6.1.1 Authorized TA**

**6.1.1.1 TA subject to a Limitation of Expenditure**

- a. When the basis of payment specified in a TA authorized and issued under the Contract is limitation of expenditure, the Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work specified in the authorized TA, as determined in accordance with the basis of payment cost elements, in Annex B, to the limitation of expenditure specified in the authorized TA.
- b. Canada's total liability to the Contractor under the authorized TA must not exceed the limitation of expenditure specified in the authorized TA. Customs duties are included and Goods and Services Tax or Harmonized Sales Tax is extra, if applicable.
- c. No increase in the liability of Canada or in the price of the Work specified in the authorized TA resulting from any design changes, modifications or interpretations of the Work specified in the authorized TA will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been authorized, in writing, by the TA Authority before their incorporation into the Work specified in the authorized TA. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written authorization of the TA Authority. The Contractor must notify the TA Authority in writing as to the adequacy of this sum:
- 1) when it is 75 percent committed, or
  - 2) four (4) months before the final delivery date specified in the authorized TA, or;
  - 3) as soon as the Contractor considers that the authorized TA funds are inadequate for the completion of the Work specified in the authorized TA, whichever comes first.
- d. If the notification is for inadequate authorized TA funds, the Contractor must provide to the TA Authority, a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

**6.2 Limitation of Expenditure - Cumulative Total of all Authorized TAs**

- 
- a. Canada's total liability to the Contractor under the Contract for all authorized TAs, inclusive of any revisions, must not exceed the sum of \$ \_\_\_\_\_. Customs duties are included and the Goods and Services Tax or Harmonized Sales Tax is extra, if applicable.
- b. No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
- c. The Contractor must notify the Contracting Authority, in writing, as to the adequacy of this sum:
- 1) when it is 75 percent committed, or
  - 2) four (4) months before the Contract expiry date, or
  - 3) as soon as the Contractor considers that the sum is inadequate for the completion of the Work required and requested in all authorized TAs, inclusive of any revisions, the applicable basis of payment of which is limitation of expenditure (contract clause 6.1.1.1, TA subject to a Limitation of Expenditure), whichever comes first.
- d. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

### **6.3 Methods of Payment - Authorized TA**

- a. One, several or all of the following methods of payment will form part of the authorized TA:

1) Single Payment

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

1. 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;
2. all such documents have been verified by Canada;
3. the Work delivered has been accepted by Canada.

2) Monthly Payments

Canada will pay the Contractor on a monthly basis for work performed during the month covered by the invoice in accordance with the payment provisions of the Contract if:

1. 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;
2. all such documents have been verified by Canada;
3. the Work performed has been accepted by Canada.

### **6.4 Payment Credits**

- a. If the Contractor does not provide a required professional services resource that has all the required qualifications to deliver the training sessions under the approved TA, the Contractor must credit to Canada a flat rate of \$2,500.00 for administrative expenses, including all travel expenses if applicable, incurred by Canada for the purpose of the course.

- 
- b. Credits Apply during Entire Contract Period: The Parties agree that the credits apply throughout the Contract Period.
- c. Credits represent Liquidated Damages: The Parties agree that the credits are liquidated damages and represent their best pre-estimate of the loss to Canada in the event of the applicable failure. No credit is intended to be, nor will it be construed as, a penalty.
- d. Canada's Right to Obtain Payment: The Parties agree that these credits are a liquidated debt. To collect the credits, Canada has the right to hold back, draw back, deduct or set off from and against any money Canada owes to the Contractor from time to time.
- e. Canada's Rights & Remedies not Limited: The Parties agree that nothing in this Article limits any other rights or remedies to which Canada is entitled under the Contract (including the right to terminate the Contract for default) or under the law generally.
- f. Audit Rights: The Contractor's calculation of credits under the Contract is subject to verification by government audit, at the Contracting Authority's discretion, before or after payment is made to the Contractor. The Contractor must cooperate fully with Canada during the conduct of any audit by providing Canada with access to any records and systems that Canada considers necessary to ensure that all credits have been accurately credited to Canada in the Contractor's invoices. If an audit demonstrates that past invoices contained errors in the calculation of the credits, the Contractor must pay to Canada the amount the audit reveals was required to be credited to Canada, plus interest, from the date Canada remitted the excess payment until the date of the refund (the interest rate is the Bank of Canada's discount annual rate of interest in effect on the date the credit was first owed to Canada, plus 1.25% per year). If, as a result of conducting an audit, Canada determines that the Contractor's records or systems for identifying, calculating or recording the credits are inadequate, the Contractor must implement any additional measures required by the Contracting Authority.

## 6.5 SACC Manual Clauses

- a. A9117C (2007-11-30), T1204 - Direct Request by Customer Department

## 6.6 Discretionary Audit

- a. C0705C (2010-01-11), Discretionary Audit

## 7. Invoicing Instructions

- a. 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.
- b. Invoices must be distributed as follows:
- 1) The original and one (1) copy must be forwarded to the Project Authority for certification and payment; and
  - 2) One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

## 8. Certifications

- 
- a. Compliance with the certifications provided by the Contractor in its bid is a condition of the Contract and subject to verification by Canada during the term of the Contract. If the Contractor does not comply with any certification or it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

## **9. Applicable Laws**

- a. The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario, Canada.

## **10. Priority of Documents**

- a. 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.

- 1) the Articles of Agreement;
- 2) the general conditions 2035 (2012-07-16), General Conditions - Higher Complexity - Services;
- 3) Annex A, Statement of Work;
- 4) Annex B, Basis of Payment;
- 5) Annex C, Security Requirements Check List;
- 6) the signed Task Authorizations (including all of its annexes, if any); and
- 7) the Contractor's bid dated \_\_\_\_\_

## **11. Foreign Nationals**

- a. SACC Manual clause A2000C (2006-06-16), Foreign Nationals (Canadian Contractor)

## **12. Insurance**

- a. SACC Manual clause G1005C (2008-05-12), Insurance

## ANNEX A STATEMENT OF WORK

### 1.0 SCOPE OF WORK

- a. The Real Property Branch (RPB) of Public Works and Government Services Canada (PWGSC) requires the services of Intermediate Training Facilitators to deliver Workplace 2.0 Fit-up-Standards training modules required for the implementation of Workplace Modernization.

The Program consists of 3 Modules:

Module 1: Workplace 2.0 Fit-up Standards Overview

Module 2: Workplace 2.0 Fit-up Standards Project Specific Training

Module 3: Workplace 2.0 Fit-up Standards and Space Calculator

- b. The Training Facilitators must deliver these 3 modules on an as requested basis in both official languages, English and French, throughout the duration of the contract. A brief description of each course is available Appendix 1 to Annex A.

### 2.0 ESTIMATED NUMBER OF DELIVERIES PER MODULE

- a. The Contractor understands and agrees that the annual estimated number of courses identified in the table below does not constitute a Contractor guarantee and could go above or below the estimated amounts.
- b. Each course will have a maximum of 30 participants.

Region	Initial Contract Period (Date of Contract to March 31, 2013)			Option Period 1 April 01, 2013 to March 31, 2014			Option Period 2 April 01, 2014 to March 31, 2015		
	Module 1 ½ day	Module 2 1 day	Module 3 1 day	Module 1 ½ day	Module 2 1 day	Module 3 1 day	Module 1 ½ day	Module 2 1 day	Module 3 1 day
<b>National Capital Area</b>	10	6	5	5	3	3	5	3	3
<b>Halifax</b>	1	1	1	0	0	0	0	0	0
<b>Edmonton</b>	1	1	1	0	0	0	0	0	0
<b>Toronto</b>	1	1	1	0	0	0	0	0	0
<b>Montreal</b>	1	1	1	0	0	0	0	0	0
<b>Vancouver</b>	1	1	1	0	0	0	0	0	0

### 3.0 TASKS

- a. The Contractor must provide Intermediate Training Facilitator(s) to deliver the modules in either English or French on an 'as and when requested basis. The Contractor will manage the Training Facilitators and will ensure that the tasks are well executed.
- b. For each module, the Training Facilitator must:

- 1) Become accustomed with the course content, presentation, exercises, case studies and participants manual prior to course delivery;
- 2) Engage the audience and use practical examples that relate to the audience's work environment and experience that will be useful and applicable to the participants when back on the job;
- 3) Maintain a pace that ensures the audience is able to follow and understand the material while staying on schedule;
- 4) Use adult learning techniques and principles such as:
  - i. The adult is an active learner as oppose to a passive observer
  - ii. The adult has immediate objectives and needs to apply the learning rapidly after the course
  - iii. The adult learns easily when they are aware of the content to learn and the methods that will be used
  - iv. The adult learns best when the learning relates to their life and takes into account their past experience
  - v. The adult registered to a training course in order to solve a problem or find possible solutions to different issues
  - vi. The adult is unique from other learners because of their personal and professional experiences
  - vii. The adult when registering to a learning activity is motivated by a goal, and objective, the activity and the anticipated learning;
- 5) Record lessons learned and difficulties encountered by learners from each session and provide an electronic copy to the Project Authority within ten (10) calendar days of course delivery.
- 6) Deliver courses between 8:00-16:30.
- 7) Training Facilitators must arrive at the training facility at least 30 minutes prior to the starting time of the module delivery to verify the room setup, the equipment, take proper actions if necessary and to greet participants.
- 8) Training Facilitators must remain at the training facility at least 30 minutes after the delivery to respond to any questions from the participants.
- 9) Distribute the attendance list to participants for their signature and submit list to the Project Authority upon delivery completion.
- 10) Provide administrative briefing to participants at the beginning of the workshop outlining the location of fire exits, washrooms, lunchroom and the module outline.
- 11) Distribute the Course Evaluation form, attached as Appendix 2 to Annex A, upon completion of each module delivery and provide all completed forms to the Project Authority

#### **4.0 COURSE EVALUATION FORM**

- a. All instructional services will be subject to ongoing evaluation. RPB employees will be requested to complete an evaluation form, attached as Appendix 2 to Annex A, upon completion of each course.
- b. The contractor will be provided the evaluation results and must immediately follow-up with the Training Facilitator as part of ongoing quality assurance process. Training Facilitators must maintain a minimum average of 3 on the evaluation form attached as Appendix 2 to Annex A. The Project Authority has the right to refuse any Training Facilitator who receives an evaluation rating below the average rate of 3. The contractor must immediately replace the Training Facilitator upon request by the Project Authority.

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## 5.0 LOCATION OF TRAINING/TRAVEL

- a. Training Facilitators will be required to deliver modules to various locations throughout the National Capital Region. Travel to some regions (1 major city per region) may be required (Halifax, Edmonton, Toronto, Montreal and Vancouver) such as estimated Section 2.0.
- b. The Contractor must prepare a Travel Plan for approval by the Project Authority for any Travel and Living requirements that are cost reimbursable.

## 6.0 REAL PROPERTY BRANCH/CLIENT SUPPORT

- a. The Project Authority will:
  - 1) Provide access to a PWGSC subject matter experts;
  - 2) Organize a preliminary meetings and follow-up meetings with the contractor;
  - 3) Provide current course material;
  - 4) Create a training calendar including course dates/schedule;
  - 5) Reserving appropriate facilities for the delivery of the Program;
  - 6) Providing a contact that will arrange the logistical needs (e.g. setup the audio-visual equipment, prepare participants lists, pens, paper, tent cards);
  - 7) Providing participants' manuals and any relevant material needed as information to the participants;
  - 8) Notifying contractor of possible guest speakers;
  - 9) Providing participants with certificate of completion;
  - 10) Gathering course evaluations and prepare summary reports to be sent to the contractor as required for review and action;
  - 11) Monitoring courses when needed by the subject matter expert and the Learning Analyst throughout the contract period;
  - 12) Reviewing all changes (approval will be done by the subject matter expert and the Project Authority).

## 7.0 LANGUAGE REQUIREMENT

- a. The Training Facilitators must be able deliver the modules (read, communicate orally and in writing), in either English or French in order to deliver either the English or French module as required. Canada reserves the right to evaluate the language proficiency of any of the personnel throughout the period of the Contract. Should the evaluation of Training Facilitators determine that the Training Facilitator does not meet the language requirement; the Contractor must immediately replace the resource at no additional cost.
- b. For the purposes of this requirement, a resource will be considered to speak a language fluently if the resource can:
  - 1) Give detailed explanations and descriptions;
  - 2) Handle hypothetical questions;
  - 3) Support an opinion, defend a point of view or justify an action; and
  - 4) Counsel and give advice

## 8.0 INTELLECTUAL PROPERTY

- 
- a. All course material (e.g. participants manual, facilitator manual, presentations, case studies, exercises, etc.) designed and developed for this training program remain the intellectual property of the Crown.

## 9.0 TIME FRAME

- a. The specific schedule for training dates will be established once the material is reviewed and approved by Real Property Branch.

## 10.0 MEETINGS/PROGRESS REVIEW

- a. The Contractor or their authorized representative will be required to attend meetings with the Project Authority. These meetings may include but are not limited to the following:

### 1) Kick-off Meeting

A Kick-off meeting chaired by the Contracting Authority (CA) will be held with the Contractor, within approximately fifteen (15) days from the date of Contract award. The time and location of the kick-off meeting will be provided upon contract award.

The purpose of the kick-off meeting will be as a minimum to:

- Review the contractual requirements;
- Review and clarify, if required, the respective roles and responsibilities of the Contracting Authority (CA), the Project Authority (PA) and of the Contractor to ensure common understanding.

### 2) Progress Review Meeting

Progress review meeting(s) (PRM) may be held at least once per year. Additional PRM's may be held at the discretion of the Project Authority. The purpose of the meetings will be to review and discuss:

- Review changes made to the course material
- Present and future course requirements
- The quality of the courses delivered
- Other issues concerning the contract

### 3) Additional Progress Review Meetings (PRM)

The Project Authority may request additional PRM at any time, or the Contractor as and when required to discuss operational, administrative or contractual problems.

### 4) Urgent Meetings

The Project Authority and/or Contracting Authority may request a meeting at any time to resolve urgent matters, issues or concerns. These meetings will be held within the National Capital Region.

- b. The Contractor will not be reimbursed for any costs incurred by the Contractor for these meetings.

## APPENDIX 1 TO ANNEX A

**MODULE 1- GC Workplace 2.0 Fit-up Standards  
Overview Training  
DRAFT Schedule**

**Duration:** ½ Day - 8:30 - 12:00

Time	Topics
8:30 - 9:00	Following opening remarks, Facilitator to discuss: <ul style="list-style-type: none"> <li>•Budget 2012 announcement (Funding - DRAPP slides/Reverse Profiling)</li> <li>•Clerk of the Privy Council - Commitment to renewing the Public Service and importance of Workplace 2.0.</li> </ul>
9:00 - 10:15	Deliver PowerPoint presentation covering the following: <ul style="list-style-type: none"> <li>•Overview of GofC Workplace 2.0 Fit-up Standards including the pillars of WP 2.0 with a focus on what has changed since 2009 as well as an overview of the accreditation process</li> <li>•Space calculator</li> <li>•Worker Profile Questionnaire</li> </ul>
10:15 - 10:30	Health Break
10:30 - 11:30	Discuss: <ul style="list-style-type: none"> <li>•The Accommodation Standards Committee (ASC) non-compliance process and review the criteria the ASC uses to provide recommendations.</li> <li>•Section A2.5 Criteria for Evaluating Requests for Non-compliance</li> </ul>
11:30 - 12:00	Question Period

Handout key mailbox resources or phone numbers, such as FITUP mailbox, WP2.0 Mailbox, non-compliance office (Director NAM)

Ask for suggestions on how to improve session, any key information missing or recurring issues with clients and the Standards that need resolving?

Facilitator to hand out an Evaluation Questionnaire and certificate of attendance

## APPENDIX 1 TO ANNEX A (cont'd)

**Module 2 GC Workplace 2.0 Fit-up Standards  
Project Specific Training  
DRAFT Schedule**

**Duration:** 1 Day - 8:30-16:30

Time Topics

Time	Topics
8:30 - 9:00	<p>Welcome and opening remarks condensed from Module 1</p> <p>Sign in sheet, ensure representation from each specialty at each table</p> <p>Facilitator to discuss:</p> <ul style="list-style-type: none"> <li>•Budget 2012 announcement (Funding - DRAPP slides/Reverse Profiling)</li> <li>•Clerk of the Privy Council - Commitment to renewing the Public Service and importance of Workplace 2.0</li> </ul>
9:00 - 10:15	<p>Deliver PowerPoint presentation covering the following:</p> <ul style="list-style-type: none"> <li>•Overview of GC Workplace 2.0 Fit-up Standards including the pillars of WP 2.0 with a focus on what has changed since 2009 as well as areas in the Fit-up Standards which participants will reference for the exercise.</li> <li>•Framework for Office Accommodation and Accommodation Services - Space Allocation Standards</li> <li>•Space calculator</li> <li>•Worker Profile questionnaire</li> <li>•Section A2.5 Criteria for Evaluating Requests for Non-Compliance</li> </ul>
10:15 - 10:30	Health Break
10:30 - 12:00	Case Study - Led by Facilitator (material provided by PWGSC)
12:00 - 13:00	Lunch Break
13:00 - 14:15	Group Exercise - Led by Facilitator (material provided by PWGSC)
14:15 - 14:30	Health Break
14:30 - 16:15	Each group will present their floor plan and findings
16:15 - 16:30	Question Period

## APPENDIX 1 TO ANNEX A (cont'd)

**Module 3 GC Workplace 2.0 Fit-up Standards  
and Space Calculator Training  
DRAFT Schedule**

**Duration:** 1 Day - 8:30-16:30

Time	Topics
8:30 - 9:00	<p>Welcome and opening remarks condensed from Module 1</p> <ul style="list-style-type: none"> <li>• Sign in sheet, ensure representation from each specialty at each table.</li> </ul> <p>Facilitator to discuss:</p> <ul style="list-style-type: none"> <li>• Budget 2012 announcement (Funding - Deficit Reduction Action Plan (DRAP))</li> <li>• Clerk of the Privy Council - Message on commitment to renewing the Public Service and the importance of Workplace 2.0</li> </ul>
9:00 - 10:15	<p>Deliver PowerPoint presentation covering the following:</p> <ul style="list-style-type: none"> <li>• Overview of GC Workplace 2.0 Fit-up Standards including the pillars of WP 2.0 with a focus on what has changed since 2009.</li> <li>• Framework for Office Accommodation and Accommodation Services - Space Allocation Standards - Funding Accountabilities</li> <li>• Worker Profile questionnaire</li> </ul>
10:15 - 10:30	Health Break
10:30 - 12:00	Case Study - Led by Facilitator (material provided by PWGSC) Space Calculator and Tools
10:30 - 12:00	Lunch Break
13:00 - 14:15	<ul style="list-style-type: none"> <li>• With the case study information the Facilitator will walk through each completed document, starting with the completed CARQ followed by the space calculator</li> <li>• Non-compliant evaluation criteria discussed</li> </ul>
14:15 - 14:30	Health Break
14:30 - 16:15	Continuation of revision of completed documents
16:15 -16:30	Question Period

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**APPENXIX 2 TO ANNEX A  
Course Evaluation Sheet**

SEE ATTACHED

## ANNEX B BASIS OF PAYMENT

During the period of the Contract, for Work performed in accordance with the Contract, the Contractor will be paid as specified below.

### 1.0 Professional Fees

The Contractor will be paid all inclusive fixed price per module as follows:

#### NATIONAL CAPITAL REGION

Module	All Inclusive Fixed Price Per Module		
	Initial Contract Period	Option Period 1 April 01, 2013 to March 31, 2014	Option Period 2 April 01, 2014 to March 31, 2015
Module 1 (half day)	\$	\$	\$
Module 2 (full day)	\$	\$	\$
Module 3 (full day)	\$	\$	\$

#### HALIFAX

Module	All Inclusive Fixed Price Per Module		
	Initial Contract Period	Option Period 1 April 01, 2013 to March 31, 2014	Option Period 2 April 01, 2014 to March 31, 2015
Module 1 (half day)	\$	\$	\$
Module 2 (full day)	\$	\$	\$
Module 3 (full day)	\$	\$	\$

#### EDMONTON

Module	All Inclusive Fixed Price Per Module		
	Initial Contract Period	Option Period 1 April 01, 2013 to March 31, 2014	Option Period 2 April 01, 2014 to March 31, 2015
Module 1 (half day)	\$	\$	\$
Module 2 (full day)	\$	\$	\$
Module 3 (full day)	\$	\$	\$

#### TORONTO

Module	All Inclusive Fixed Price Per Module		
	Initial Contract Period	Option Period 1 April 01, 2013 to March 31, 2014	Option Period 2 April 01, 2014 to March 31, 2015
Module 1 (half day)	\$	\$	\$
Module 2 (full day)	\$	\$	\$
Module 3 (full day)	\$	\$	\$

**MONTREAL**

Module	All Inclusive Fixed Price Per Module		
	Initial Contract Period	Option Period 1 April 01, 2013 to March 31, 2014	Option Period 2 April 01, 2014 to March 31, 2015
Module 1 (half day)	\$	\$	\$
Module 2 (full day)	\$	\$	\$
Module 3 (full day)	\$	\$	\$

**VANCOUVER**

Module	All Inclusive Fixed Price Per Module		
	Initial Contract Period	Option Period 1 April 01, 2013 to March 31, 2014	Option Period 2 April 01, 2014 to March 31, 2015
Module 1 (half day)	\$	\$	\$
Module 2 (full day)	\$	\$	\$
Module 3 (full day)	\$	\$	\$

**1.1 ESCALATION**

- a. In the event that the first and second option period are exercised, the Firm All-Inclusive Price Per Module in tables: Halifax, Edmonton, Toronto, Montreal, and Vancouver, inclusive will be adjusted annually for each Calendar Year by the amount established based on the average percentage change in the monthly index of the Consumer Price Index for Canada, All-Items (Not Seasonally Adjusted), published in Statistics Canada Catalogue no.62-001-XPE, Table 5, for the 12-month period ending 2 months prior to the start of the next option year period.

Example:

In Option Year 1 of a contract commencing April 01, 2013 the Initial Contract Period rates as stated in tables: Halifax, Edmonton, Toronto, Montreal, and Vancouver would be increased by 2.16% based on the following information:

% Change in Monthly CPI

February 2012 2.4  
 March 2012 2.8  
 April 2012 2.5  
 May 2012 2.4  
 June 2012 2.1  
 July 2012 0.9  
 August 2012 1.4  
 September 2012 2.0  
 October 2012 2.2  
 November 2012 2.8  
 December 2012 2.2  
 January 2014 2.2

Avg % Change  $25.9 / 12 = 2.16\%$

The Second Option Period prices would be adjusted using the same calculation but with a February 2013 - January 2014 12-month period and the First Option Period prices as the base.

## 2.0 Cost Reimbursable Expenses

### 2.1 Authorized travel and living expenses for Work performed outside the National Capital Region (NCR), Halifax Metropolitan Area, Edmonton Metropolitan Area, Toronto Metropolitan Area, Montreal Metropolitan Area, and Vancouver Metropolitan Area only

For the requirements relative to travel described in section 5.0 of the Statement of Work in Annex A:

The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the Treasury Board Travel Directive, and with the other provisions of the directive referring to "travellers", rather than those referring to "employees".

All travel must have the prior authorization of the Project Authority.

The authorized travel and living expenses will be paid upon submission of an itemized statement supported by receipt vouchers. All payments are subject to government audit.

Canada will not accept any travel and living expenses for:

#### a. NATIONAL CAPITAL REGION

- 1) Work performed within the National Capital Region (NCR). The NCR is defined in the *National Capital Act*, R.S.C. 1985, c. N-4, S.2. *The National Capital Act* is available on the Justice Website: <http://laws.justice.gc.ca/eng/acts/N-4/> ;
- 2) Any travel between the Contractor's place of business and the NCR; and
- 3) Any relocation of resources required to satisfy the terms of the Contract. These expenses are included in the all inclusive fixed price per module specified in subsection 1.0 above.

#### b. HALIFAX METROPOLITAN AREA

- 1) Work performed within the Halifax Metropolitan Area. The Halifax Metropolitan Area is defined as: bounded on the west by a north-south line running from Kentville to Bridgewater, on the north by a west-east line running from Kentville to Truro, on the east by a line north-south line from Truro to Tangier, on the south by the Atlantic Ocean;
- 2) Any travel between the Contractor's place of business and the Halifax Metropolitan Area; and
- 3) Any relocation of resources required to satisfy the terms of the Contract. These expenses are included in the all inclusive fixed price per module specified in subsection 1.0 above.

#### c. EDMONTON METROPOLITAN AREA

- 1) Work performed within the Edmonton Metropolitan Area. The Edmonton metropolitan Area is defined as: bounded on the west by a north-south line running from Westlock to Gainford, on the north by a west-east line running from Westlock to Vegreville, on the east by north-south line from Vegreville to Ponoka, on the south by a east-west line from Ponoka to Gainford;
- 2) Any travel between the Contractor's place of business and the Edmonton Metropolitan Area; and

- 3) Any relocation of resources required to satisfy the terms of the Contract. These expenses are included in the all inclusive fixed price per module specified in subsection 1.0 above.

#### **d. TORONTO METROPOLITAN AREA**

- 1) Work performed within the Toronto Metropolitan Area. The Toronto Metropolitan Area is defined as: bounded on the west by a south-north line running from Burlington to Caledon, on the north by a west-east line running from Caledon to Newmarket, on the east by a north-south line from Newmarket to Oshawa, on the south by Lake Ontario;
- 2) Any travel between the Contractor's place of business and the Toronto Metropolitan Area; and
- 3) Any relocation of resources required to satisfy the terms of the Contract. These expenses are included in the all inclusive fixed price per module specified in subsection 1.0 above.

#### **e. MONTREAL METROPOLITAN AREA**

- 1) Work performed within the Montreal Metropolitan Area. The Montreal Metropolitan Area is defined as: bounded on the west by the Ontario border and a north-south line running from Ste-Agathe-des-Monts to Carillon, as far north as Louiseville, on the east by a north-south line from Louiseville, passing by Drummondville, to Bromont, on the south by the United States of America (USA) border;
- 2) Any travel between the Contractor's place of business and the Montreal Metropolitan Area; and
- 3) Any relocation of resources required to satisfy the terms of the Contract. These expenses are included in the all inclusive fixed price per module specified in subsection 1.0 above.

#### **f. VANCOUVER METROPOLITAN AREA**

- 1) Work performed within the Vancouver Metropolitan Area. The Vancouver Metropolitan Area is defined as: bounded on the west by the Strait of Georgia, on the south by the USA border and by a north-south line from Lions Bay to Abbotsford;
- 2) Any travel between the Contractor's place of business and the Vancouver Metropolitan Area; and
- 3) Any relocation of resources required to satisfy the terms of the Contract. These expenses are included in the all inclusive fixed price per module specified in subsection 1.0 above.

### **3.0 Course Cancellation**

#### **3.1 Course Cancellation**

For the cancellation or rescheduling of modules:

- a. Canada may cancel or reschedule a scheduled module without incurring a fee by giving a written notice to the contractor at least 10 calendar days prior to the delivery date;
- b. In the event that Canada cancels a module between 4 to 9 calendar days prior to the delivery date, the Contractor will be paid 25% of the price per module in accordance with Annex B - Basis of Payment, 1.0 above;
- c. In the event that Canada cancels a module 3 or fewer calendar days prior to the delivery date, the Contractor will be paid 50% of the price per module in accordance with Annex B - Basis of Payment, 1.0 above;

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- d. In the event that Canada cancels or reschedules a scheduled module on the day of or during the module, the Contractor will be paid the price per module in accordance with Annex B - Basis of Payment, 1.0 above; or
- e. In the event that, due to the unavailability of the Contractor's resource, Canada cancels or reschedules a scheduled module on the day of or during the delivery, the Contractor will reimburse Canada in accordance with article 6.4 - Payment Credits in the Contract Clauses.
- f. If the Project Authority has 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 given to the Contractor.

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## **ANNEX C SECURITY REQUIREMENTS CHECK LIST**

**See Attached SRCL**

## ANNEX D TASK AUTHORIZATION FORM

### TASK AUTHORIZATION FORM - FORMULAIRE D'AUTORISATION DE TÂCHE ANNEX - ANNEXE \_\_\_\_

<b>Contract Number - Numéro du contrat</b>		
<b>Task Authorization (TA) No. - N° de l'autorisation de tâche (AT)</b>		
<b>Contractor's Name and Address - Nom et adresse de l'entrepreneur</b>		
<b>Original Authorization - Autorisation originale</b>		
Total Estimated Cost of Task (GST/HST extra) before any revisions: Coût estimatif total de la tâche (TPS/TVH en sus) avant toutes révisions :		\$
<b>TA Revisions Previously Authorized(as applicable) - Révisions de l'AT autorisées précédemment (s'il y a lieu)</b>		
<p>Instructions to the TA Authority: the information for the previously authorized revisions must be presented in ascending order of assigned revision numbers (the first revision must be identified as No. 1, the second as No. 2, etc ). If no increase or decrease was authorized, enter \$0.00. Add rows, as needed. - Instructions à l'attention de la personne responsable de l'autorisation d'une AT: les révisions autorisées précédemment doivent être présentées par ordre croissant des numéros de révision attribués (la première révision doit être identifiée par le numéro 1, la seconde par le numéro 2, et ainsi de suite). Si aucune augmentation ou diminution n'a été autorisée, inscrire 0.00\$. Au besoin, ajouter des rangées.</p>		
TA Revision No. - N° de Révision de l'AT :		Authorized Increase or Decrease (GST/HST extra) : Augmentation ou réduction autorisée (TPS/TVH en sus) : \$
TA Revision No. - N° de Révision de l'AT :		Authorized Increase or Decrease (GST/HST extra) : Augmentation ou réduction autorisée (TPS/TVH en sus): \$
TA Revision No. - N° de Révision de l'AT :		Authorized Increase or Decrease (GST/HST extra) : Augmentation ou réduction autorisée (TPS/TVH en sus): \$
<b>New TA Revision (as applicable) - Nouvelle révision de l'AT (s'il y a lieu)</b>		
<p>Instructions to the TA Authority: the first revision must be identified as No. 1, the second as No. 2, etc. If no increase or decrease is authorized, enter \$0.00. - Instructions à l'attention de la personne responsable de l'autorisation d'une AT: la première révision doit être identifiée par le numéro 1, la seconde par le numéro 2, et ainsi de suite. Si aucune augmentation ou diminution n'est autorisée, inscrire 0.00\$</p>		
TA Revision No. - N° de Révision de l'AT :		Authorized Increase or Decrease (GST/HST extra) : Augmentation ou réduction autorisée (TPS/TVH en sus): \$
Total Estimated Cost of Task (GST/HSTextra) after this revision: Coût estimatif total de la tâche (TPS/TVH en sus) après cette révision :		\$
<b>Contract Security Requirements (as applicable) - Exigences du contrat relatives à la sécurité (s'il y a lieu)</b>		

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This task includes security requirements. - Cette tâche comprend des exigences relatives à la sécurité:

No - Non

Yes. Refer to the Security Requirements Checklist (SRCL) annex of the Contract. Oui. Voir l'annexe du contrat comprenant la Liste de vérification des exigences relatives à la sécurité (LVERS).

Remarks (as applicable) - Remarques (s'il y a lieu):

### Required Work - Travaux requis

*The content of sections A, B, C and D below must be in accordance with the Contract. Le contenu des sections A, B, C et D ci-dessous doit être conforme au contrat.*

#### SECTION A- Task Description of the Work required - Description de tâche des travaux requis

#### SECTION B- Applicable Basis of Payment - Base de paiement applicable

#### SECTION C- Cost Breakdown of Task- Ventilation du coût de la tâche

#### SECTION D- Applicable Method of Payment - Méthode de paiement applicable

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### Authorization - Autorisation

**By signing this TA, the Project Authority or the PWGSC Contracting Authority or both, as applicable, certify (ies) that the content of this TA is in accordance with the Contract.**

**En apposant sa signature sur cette AT, le chargé de projet ou l'autorité contractante de TPSGC ou, s'il y a lieu, les deux atteste(nt) que le contenu de cette AT respecte les conditions du contrat.**

Name of Project Authority - Nom du chargé de projet \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Name of PWGSC Contracting Authority -  
Nom de l'autorité contractante de TPSGC \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

### Contractor's Signature - Signature de l'entrepreneur

Name and title of individual authorized to sign for the Contractor  
Nom et titre de la personne autorisée à signer au nom de l'entrepreneur

\_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

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## **ANNEX E**

### **Sample MS Office Excel Spreadsheet for Periodic Usage Reports - Contracts with TAs**

**See Attached**



Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat 20131327
Security Classification / Classification de sécurité UNCLASSIFIED

SECURITY REQUIREMENTS CHECK LIST (SRCL)  
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE			
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine Public Works and Government Services Canada		2. Branch or Directorate / Direction générale ou Direction RPB	
3. a) Subcontract Number / Numéro du contrat de sous-traitance		3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail Consultant to deliver fit-up standards			
5. a) Will the supplier require access to Controlled Goods? / Le fournisseur aura-t-il accès à des marchandises contrôlées?		<input checked="" type="checkbox"/> No / Non	<input type="checkbox"/> Yes / Oui
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? / Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?		<input checked="" type="checkbox"/> No / Non	<input type="checkbox"/> Yes / Oui
6. Indicate the type of access required / Indiquer le type d'accès requis			
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? / Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) / (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)		<input type="checkbox"/> No / Non	<input checked="" type="checkbox"/> Yes / Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. / Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.		<input checked="" type="checkbox"/> No / Non	<input type="checkbox"/> Yes / Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? / S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?		<input checked="" type="checkbox"/> No / Non	<input type="checkbox"/> Yes / Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès			
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>	
7. b) Release restrictions / Restrictions relatives à la diffusion			
No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>	
Not releasable / À ne pas diffuser <input type="checkbox"/>			
Restricted to: / Limité à: <input type="checkbox"/> Specify country(ies): / Préciser le(s) pays:	Restricted to: / Limité à: <input type="checkbox"/> Specify country(ies): / Préciser le(s) pays:	Restricted to: / Limité à: <input type="checkbox"/> Specify country(ies): / Préciser le(s) pays:	
7. c) Level of information / Niveau d'information			
PROTECTED A / PROTÉGÉ A <input checked="" type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>	
PROTECTED B / PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>	
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	
SECRET <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET <input type="checkbox"/>	
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>	
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>	



Government of Canada / Gouvernement du Canada

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**PART A (continued) / PARTIE A (suite)**

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?  
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS?  
if Yes, indicate the level of sensitivity.  
Dans l'affirmative, indiquer le niveau de sensibilité:  No / Non  Yes / Oui

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?  
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?  
Short Title(s) of material / Titre(s) abrégé(s) du matériel:  
Document Number / Numéro du document:  No / Non  Yes / Oui

**PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)**

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

<input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITÉ	<input type="checkbox"/> CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/> SECRET SECRET	<input type="checkbox"/> TOP SECRET TRÈS SECRET
<input type="checkbox"/> TOP SECRET - SIGINT TRÈS SECRET - SIGINT	<input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/> NATO SECRET NATO SECRET	<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET
<input type="checkbox"/> SITE ACCESS ACCÈS AUX EMPLACEMENTS			

Special comments:  
Commentaires spéciaux: \_\_\_\_\_

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.  
REMARQUE: Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?  
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail?  No / Non  Yes / Oui  
If Yes, will unscreened personnel be escorted?  
Dans l'affirmative, le personnel en question sera-t-il escorté?  No / Non  Yes / Oui

**PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)**

**INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS**

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?  
Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS?  No / Non  Yes / Oui

11. b) Will the supplier be required to safeguard COMSEC information or assets?  
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC?  No / Non  Yes / Oui

**PRODUCTION**

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?  
Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?  No / Non  Yes / Oui

**INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)**

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?  
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS?  No / Non  Yes / Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?  
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale?  No / Non  Yes / Oui



Contract Number / Numéro du contrat 20131327
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**PART C - (continued) / PARTIE C - (suite)**

For users completing the form manually use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.

Les utilisateurs qui remplissent le formulaire manuellement doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form online (via the Internet), the summary chart is automatically populated by your responses to previous questions.

Dans le cas des utilisateurs qui remplissent le formulaire en ligne (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

**SUMMARY CHART / TABLEAU RÉCAPITULATIF**

Category / Catégorie	PROTECTED / PROTÉGÉ			CLASSIFIED / CLASSIFIÉ			NATO				COMSEC						
	A	B	C	CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET	NATO RESTRICTED / NATO DIFFUSION RESTRICTION	NATO CONFIDENTIAL / NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET / COSMIC TRÈS SECRET	PROTECTED / PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET / TRÈS SECRET	
											A	B	C				
Information / Assets / Renseignements / Biens / Production																	
IT Media / Support TI																	
IT Link / Lien électronique																	

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?  
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?  No / Non  Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".  
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?  
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?  No / Non  Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).  
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

**Course:** Subject (Code)

**Date:** Date

**Location** place

**Instructor:** Name of facilitator

**COURSE EFFECTIVENESS:**

	EXCELLENT	VERY GOOD	GOOD	NOT BAD	POOR
	5	4	3	2	1
1. How did you find the pace of the course?					
2. How closely were your own personal objectives met?					
3. Overall how would you rate this course?					
4. What was done very well?					
5. Which module was <u>most</u> beneficial to you?					
6. Which module was <u>least</u> beneficial to you?					
7. Other comments					

**INSTRUCTOR EFFECTIVENESS:**

	EXCELLENT	VERY GOOD	GOOD	NOT BAD	POOR
	5	4	3	2	1
1. Communicated course material effectively?					
2. Provided constructive feedback?					
3. Projected enthusiasm and a positive approach?					
4. Demonstrated mastery of the subject?					
5. Other comments					

**GENERAL:**

	YES	NO
1. Did you find the course instructive?		
2. What could have been done differently to <b>improve</b> the course?		

**ADMINISTRATION:**

1. Do you have any comments or suggestions regarding classroom facilities?

**OTHER:**

Which other session would you like to attend or which tool would be beneficial to manage change effectively?

Name:

Title:

Section:





Active Status	Active Status- Explanation
100%	
20%	
5%	

**Summary of all Authorized TAs**

Canada's Total Liability All TAs	Total Estimated Cost Authorized in all TAs, GST/HST extra	Total Cost Incurred, GST/HST extra - All TAs	Total Cost Invoiced, GST/HST extra - All TAs	Cumulative GST/HST Invoiced- All TAs
\$700,000.00	\$42,000.00	\$16,695.60	\$15,395.60	\$769.78

Total Amount Paid, GST/HST included - All TAs	\$11,540.20
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