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

LETTER OF INTEREST
LETTRE D'INTÉRÊT

Comments - Commentaires

Vendor/Firm Name and Address
Raison sociale et adresse du fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution
Training and Specialized Services Division/Division de la formation et des services spécialisés
11 Laurier St. / 11, rue Laurier
10C1, Place du Portage
Gatineau, Québec K1A 0S5

Title - Sujet
Services d'apprentissage

Solicitation No. - N° de l'invitation E60ZH-070003/E	**Date** 2014-03-19
Client Reference No. - N° de référence du client E60ZH-070003	**GETS Ref. No. - N° de réf. de SEAG** PW-$$ZH-121-27332
File No. - N° de dossier 121zh.E60ZH-070003	**CCC No./N° CCC - FMS No./N° VME**

Solicitation Closes - L'invitation prend fin
at - à 02:00 PM
on - le 2014-04-25

Time Zone
Fuseau horaire
Eastern Daylight Saving Time EDT

F.O.B. - F.A.B.
Plant-Usine: ☐ **Destination:** ☐ **Other-Autre:** ☐

Address Enquiries to: - Adresser toutes questions à: Steele, Brian	**Buyer Id - Id de l'acheteur** 121zh
Telephone No. - N° de téléphone (819) 956-3569 ( )	**FAX No. - N° de FAX** ( ) -

Destination - of Goods, Services, and Construction:
Destination - des biens, services et construction:
DEPARTMENT OF PUBLIC WORKS AND GOVERNMENT SERVICES CANADA
AS PER RESULTING CALL-UPS
Canada

Instructions: See Herein

Instructions: Voir aux présentes

Delivery Required - Livraison exigée See Herein	**Delivery Offered - Livraison proposée**

Vendor/Firm Name and Address
Raison sociale et adresse du fournisseur/de l'entrepreneur

Telephone No. - N°de téléphone
Facsimile No. - N° de télécopieur

Name and title of person authorized to sign on behalf of Vendor/Firm (type or print)
Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)

Signature **Date**

Canada

REQUEST FOR INFORMATION (RFI)

REGARDING THE

LEARNING SERVICES STANDING OFFER AND SUPPLY ARRANGEMENT (LEARNING SERVICES SOSA)

REQUIRED BY THE GOVERNMENT OF CANADA

TABLE OF CONTENTS

SECTION "A"
REQUEST FOR INFORMATION OBJECTIVES

A1.0 Background

In June 2009, PWGSC established a new National method of supply, including both a National Master Standing Offer and a Supply Arrangement to provide "Learning Services" for the Government of Canada.

The Procurement Plan includes a provision to "Refresh" the Method of Supply every 12 months with an on-going opportunity under the Supply Arrangement. As a part of the National Procurement Strategy, PWGSC conducted an On-Going Opportunity for Qualification to allow new suppliers to become "Qualified Suppliers" with a Supply Arrangement. The On-Going Opportunity closed on January 03, 2014.

It has been two years since the last "Refresh" of the Learning Services Method of Supply (Standing Offer and Supply Arrangement). It is PWGSC's intention to solicit the "Refresh" in May 2014 with the changes resulting from this Request for Information.

A2.0 Purpose of the Learning Services Standing Offer and Supply Arrangement

The Learning Services SOSA is designed to:

- Create, update or convert government owned training courses for:
  - traditional classroom training;
  - eLearning / on-line training; and/or
  - blended Learning
- Delivery of Government Owned Training

The following three specific limitations exist with respect to the Learning Services SOSA:

- Requirements that require only Multimedia Design and Development services that can be acquired by Supply Arrangement EN578-092642 must be acquired through that Supply Arrangement. Services not listed in EN578-092642 but listed in the Learning Services SOSA are not subject to this restriction.
- Off-the-Shelf / Predeveloped Training Solutions cannot be acquired through the Learning Services SOSA
- The Instructor category can only be used for the delivery of Government Owned Courses.

A3.0 RFI Objective

The purpose of this Request for Information (RFI) is to provide industry with an early opportunity to assess and comment on requirements, procurement strategy, and evaluation criteria in order to maximize best value to Canada, while reducing potential problems when the Learning Services Request For Standing Offer (RFSO) / Request for Supply Arrangement (RFSA) "Refresh" is posted.

This feedback will assist Canada in finalizing the requirements of the next “Refresh” of the Learning Services Method of Supply. The RFI information herein will also provide potential Service Providers an update on the procurement in preparation for the eventual RFSO / RFSA “Refresh”.

A4.0 Requirement Definition

The information provided by Canada in this RFI is preliminary and may change. The final procurement approach may differ depending on responses to the RFI and other factors as the procurement process develops. This RFI is not a bid solicitation nor will it be used to pre-qualify or otherwise restrict participation in any future RFSO/RFSA. A contract will not result from this RFI. Responses will not be formally evaluated.

A5.0 Schedule for the Learning Services SOSA “Refresh”

It is currently anticipated that the RFSO / RFSA for the “Refresh” will be issued on GETS (buyandsell.gc.ca) in May 2014, with an antipating issuance of the new Standing Offers and Supply Arrangements prior to August, 2014. It remains the Supplier’s responsibility to check buyandsell.gc.ca for the “Refresh”, as it may be posted before or after the planned timeline.

SECTION "B"
ADMINISTRATIVE MATTERS

B1.0 Submission of Responses

B1.1 Number of Copies

Responses submitted via e-mail - one (1) copy

B1.2 Location

Responses must be sent to the Contracting Authority by mail, e-mail or fax. Contact information is contained in B2.1

The Respondent's name, return address, RFI solicitation number and closing date should be clearly visible on the response. Responses to this RFI will not be returned.

B2.0 Authorities

B2.1 Contracting Authority

The Contracting Authority (or delegated representative) is responsible for the management of the RFI process.

Brian Steele
A/Supply Team Leader
Training and Specialized Services Division
Professional Services Procurement Directorate
Services and Technology Acquisition Management Sector
Acquisitions Branch
Public Works and Government Services Canada

Place du Portage, Phase III, 10C1, Office 32
11 Laurier Street
Gatineau, Québec K1A 0S5
Telephone: (819) 956-3569 Fax: (819) 956-1432
E-mail address: brian.steele@tpsgc-pwgsc.gc.ca

B3.0 Industry Information Session

B3.1 General Industry Information Session

At present, there is no plan to hold a General Industry Information Session.

B3.2 Subsequent Individual Vendor Sessions

Following receipt of the RFI responses from industry, PWGSC **may** hold individual vendor sessions to provide vendors who have responded substantively to this RFI with the opportunity to clarify specific elements with regards to their response. These sessions are considered an extension of this industry consultation process and could be scheduled at anytime after receiving a substantive response to this RFI.

B4.0. Industry Responses

B4.1 Response Format

For ease of use and in order that the greatest value be gained from responses, Canada requests respondents to follow the structure outlined in **Section D - Questions for Industry**. There is no page limit on the information to be provided.

B4.2 Language of Response

Responses may be in English or French, at the preference of the respondent.

B4.3 Response Parameters

Responders are reminded that this is an RFI and not a Request For Standing Offer (RFSO) or a Request for Supply Arrangement (RFSA) and, in that regard, Responders should feel free to provide their comments, concerns, and, where applicable, alternative recommendations on how the requirement may be satisfied. Also, in responding to this RFI, Responders are asked to clearly explain any assumptions they may wish to make.

B4.4 Response Confidentiality

Responders are requested to clearly identify those portions of their response that are proprietary to the Responder. The confidentiality of each Responders response will be maintained. However, due to the nature of the RFI activity Responders must be aware that aspects of their response may be used as a basis for modifying the draft documents as Canada prepares for the future procurement.

SECTION "C"
PROCUREMENT STRATEGY

C1.0 GLOBAL STRATEGY

C1.1 Identified Users

It is proposed to continue to issue multiple National Master Standing Offers (NMSO) and Supply Arrangements (SA) for the provision of Learning Services which will be available to all Canadian Government Departments, Department Corporations, or Agency, as identified in Schedules I, I.1, II, III, IV or V of the Financial Administration Act.

It is proposed that the Learning Services method of supply will continue to be a non-mandatory method of supply for Identified Users.

C1.2 Number of Standing Offers and Supply Arrangements

No limit will be set on the number of Standing Offers (SO) and Supply Arrangements (SA) to be issued.

C1.3 Period of Standing Offer and Supply Arrangement

The SO and SA will "Refresh" approximately every 12 months with an "Ongoing" opportunity for new suppliers to become "Qualified Suppliers" with a Supply Arrangement. Existing Qualified Suppliers, may submit an arrangement in order to become a Qualified Supplier for Tiers, Categories of Personnel and/or Streams for which they were not previously qualified for. It is proposed that PWGSC introduce the functionality for suppliers who are deemed compliant as a result of this "Refresh" and/or any Ongoing Opportunity of the Supply Arrangement, to be given the opportunity to automatically receive a Standing Offer and are asked to provide rates through the Data Collection Component (DCC) fed into the Centralized Professional Services System (CPSS) client search module. The evaluation of the arrangements will be conducted in cycles, not less than quarterly, during the Ongoing Opportunity.

The strategy of automatic renewal for the method of supply will be used perpetually until such time as PWGSC determines that this tool no longer meets the needs of the clients.

C1.4 Standing Offer / Supply Arrangement "Refresh" Requirements

Existing Offerors / Suppliers

At each "Refresh", Offerors who have a Learning Services Standing Offer will have to submit a Financial Offer and Certifications in order to maintain their existing Standing Offer. The Financial Offer will be submitted using the Data Collection Component (DCC), which is fed into the Centralized Professional Services System (CPSS) client seach module.

At each "Refresh", Suppliers who have a Learning Services Supply Arrangement will have to submit Certifications in order to maintain their existing Supply Arrangement.

Existing Offerors must submit a new Technical Offer for any new stream(s) that they wish to be qualified, as well as, a Financial Offer via DCC and Certifications.

Existing Suppliers must submit a new Technical Arrangement for any new stream(s) that they wish to be qualified, as well as, Certifications.

New Offerors / Suppliers

For the Standing Offer, new Offerors must submit a Technical Offer, Financial Offer via DCC and Certifications for any stream(s) that they wish to be qualified.

For the Supply Arrangement, new Suppliers must submit a Technical Arrangement, and Certifications for any stream(s) that they wish to be qualified.

C1.5 Option to Submit a Combined Offer / Arrangement

Although the bidding process will contain two components (one for the RFSO and one for the RFSA), a single document that combines the information for the Offer and Arrangement under the Bid Solicitation can be submitted.

It is proposed that a Supplier may choose to submit just an Offer in response to the RFSO, or just an Arrangement in response to the RFSA, or submit a combined Offer and Arrangement in response to both the RFSO and RFSA.

C1.6 Creation of Streams

It is proposed that the “Requirement” remain the following 8 Streams.

(a) Stream 1 - Strategic Learning Advisory Services
(b) Stream 2 - Instructional Design & Development Services
(c) Stream 3 - Custom eLearning Product Programming
(d) Stream 4 - Rapid eLearning Product Programming
(e) Stream 5 - Quality Assurance
(f) Stream 6 - Multi-Media Design and Development
(g) Stream 7 - Project Management
(h) Stream 8 - Instruction

Offerors / Suppliers will be able to bid on one or more of the Streams.

C1.7 Technical Evaluation Strategy

It is proposed that the technical evaluation strategy include just Mandatory Criteria by Stream. The proposed mandatory criteria are contained in Annex “E”**.**

It is proposed that the same evaluation criteria be used for the RFSO and the RFSA.

C1.8 Security Requirements

It is proposed the minimum level of security will continue to require to hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC) prior to being issued a Standing Offer and/or Supply Arrangement. In addition, offerors / suppliers must be registered, exempt or excluded under the Controlled Goods Program.

Various additional pre-approved Security Requirement Check Lists (SRCLs) will be included in the Standing Offer and Supply Arrangement for use by the Identified Users. It is proposed that Identified Users will be able to create additional SRCLs under the Standing Offer, as well as, under the Supply Arrangements.

Identified Users will be able to carry out additional security checks.

C1.9 Security Sponsorship

It is proposed that Offerors / Suppliers can only request security sponsorship by the SO/SA Authority to the next security clearance level to be attained. For example, A) if an Offeror does not currently have a security clearance level, they may only be sponsored to a DOS/Reliability Status, and; B) should an Offeror currently have a security clearance of Reliability Status, they may only request sponsorship to the next security level.

It is proposed that new Offerors / Suppliers who have not yet received their DOS clearance from CISD by the date of issuance of the next refresh solicitation date will be considered non-responsive to the solicitation and will be required to submit a new offer / arrangement in the subsequent refresh in order to be considered for the provision of Learning Services.

C1.10 Insurance

It is proposed that Offerors / Suppliers will continue to require Commercial General Liability Insurance in accordance with Annex “G” prior to the issuance of a Standing Offer and/or Supply Arrangement.

C1.11 Delivery Requirements Outside a CLCSA

The Learning Services SOSA is not to be used for deliveries within a Comprehensive Land Claims Settlement Area (CLCSA). All requirements for delivery within a CLCSA are to be submitted to the Department of Public Works and Government Services for individual processing.

C2.0 STRATEGY RELATED TO THE STANDING OFFER

C2.1 Call-up Limits

It is proposed that Identified Users will have a call-up limitation of up to $250,000 (GST/HST inc). For requirements exceeding this amount, only PWGSC will be authorized to issue call-ups on behalf Identified Users.

C2.2 Regions & Sub-Regions

It is proposed that “Regional” pricing be included in the Standing Offer in accordance with Annex “E”. This will include the option for the Offeror to provide pricing for a region called the “National Zone”. The purpose of this pricing is to provide Identified Users to access offerors when there is no preference as to the contractor’s location in relation to the Identified User.

C2.3 Financial Offer

It is proposed that Offerors will have to provide a firm all-inclusive per diem in accordance with Annex “B” - Basis of Payment for all categories and levels of expertise within each Stream they wish to qualify **and** for each region and sub-region they wish to provide services.

The firm all-inclusive per diem rates will include Travel and Living expenses and Travel Time in accordance with Annex “B” Basis of Payment.

C2.4 Call-up Process

The "Right of First Refusal" process will continue under the "Refresh" based on the 'lowest cumulative price' for Suppliers with all of the selected categories and who hold the required level of security. Identified Users will be able create the Right of First Refusal list based on the Offerors who were found financially compliant in the selected Region(s), sub-region(s), or the National Zone when the Identified User has no preference to the Contractor's location in relation to the Identified User.

It is proposed that the lowest cumulative price will be determined as follows:

For each selected Category(ies) of Personnel at each Level of Expertise:

1) the number of resources required will be counted,
2) then will be multiplied by the firm all inclusive per diem rates of each resource, respectively
3) resulting in the total of each Category of Personnel, at each level of Expertise.
4) the Offeror's Total Evaluated Cost will be calculated by adding all the totals of each Category of Personnel.

<u>Example of the calculation of the 'lowest cumulative price:</u>

Offeror ABC:

2 Senior Instructional Designers @ $100 per day = $200
2 Intermediate Content Subject Matter Expert Consultants @ $200 per day = $400
1 Intermediate Quality Assurance Specialist @ $300 per day = $300

Total : $200 + $400 + $300 = $900

Offeror XYZ:

2 Senior Instructional Designers @ $200 per day = $400
2 Intermediate Content Subject Matter Expert Consultants @ $150 per day = $300
1 Intermediate Quality Assurance Specialist @ $400 per day = $400

Total : $400 + $300 + $400 = $1,100

Therefore, $900 is the Lowest Cumulative Price and Offeror ABC will be the 1st ranked offeror and Offeror XYZ will be the 2nd ranked offeror..

It is proposed that Identified Users will be able to send a Availability Confirmation Form up to ten (10) Offerors at a time, in accordance with the "Right of First Refusal" List.

It is proposed that the response period for an Offeror for a Availability Confirmation Form will be reduced <u>from the current</u> two (2) working days to confirm availability and five (5) working days to provide a proposal <u>to a proposed</u> two (2) working days to confirm availability and to provide a proposal.

C2.5 Directed Requirements

For requirements up to $25,000 (GST/HST inc), it is proposed that an Identified User will be allowed to direct a call-up to any of the Offerors who are listed under the Standing Offer.

C2.6 Evaluation of Financial Offer

The proposed strategy is to financially evaluate those offers that are technically compliant. Those offers that exceed plus or minus 40% of the Adjusted Median (in a given stream and region / sub-region) will be considered financially non-compliant, those offers that are within +/-40% of the Adjusted Median will be considered financially compliant. An example of this strategy is included in Annex “C”.

The proposed strategy to calculate the Total Evaluated Cost for an Offeror that will be used to financially evaluate the financial offers will be determined within the Data Collection Component (DCC).

C2.7 Limitation of Liability

It is proposed that the Limitation of Liability clause included in Annex “H” will only apply to call-ups that include services included under Stream 2 - eLearning Product Programming and Quality Assurance.

C2.8 Call-up Options

It is proposed that the ability to issue call-ups with Optional Periods and Optional Work remain.

C3.0 STRATEGY RELATED TO THE SUPPLY ARRANGEMENT

C3.1 SA Bid Solicitation Framework

Proposed			
Contract Approval Value including options	**Up to NAFTA Threshold (currently $80,400)**	**Over NAFTA Threshold and up to $2,000,000**	**Over $2,000,000**
Approach	PWGSC will remove additional rules which are not covered under existing legislation	Competition using common business rules	Competition using commonbusiness rules
Number of competitors invited	Clients determine the # of pre-qualified suppliers invited. For requirements up to $25,000, Identified Users may invoke the “does not exceed $25K” rule in accordance with GCRs . If the Identified User wishes to invoke any of the other 3 reasons for not soliciting bids under the GCRs, they will have to go outside of the Learning Services SOSA as the SOSA will only allow to invoke the “under $25K” rule.	Minimum of 15 pre-qualified suppliers (10 chosen by client, 5 at random)	All pre-qualified suppliers are invited
Bidding Period	Clients determine the # of calendar days. It will be recommended that a minimum of 5 calendar days be used.	Minimum of 15 calendar days.	Minimum of 20 calendar days.
Contract Established by	Client Departments	Client Departments	PWGSC
Bid Solicitation Method of Distribution	Clients choice to send the Bid Solicitation directly to Suppliers via e-mail or to post it on buyandsell.gc.ca.	Bid Solicitations posted on buyandsell.gc.ca.	Bid Solicitations posted on buyandsell.gc.ca.

3.2 Directed Requirements

It is proposed that for requirements up to $25,000, Identified Users may invoke the “does not exceed $25K” rule in accordance with the GCRs. If an Identified User wishes to invoke any of the other 3 reasons for not soliciting bids under the GCRs, they will have to go outside of the Learning Services SOSA as the SOSA will only allow to invoke the “under $25K” rule.

C3.3 National Zone, Region and Metropolitan Area

For requirements where less than all Suppliers are selected (in accordance with the SA Bid Solicitation Framework), it is proposed that Suppliers will only have the possibility of being invited to respond to bid solicitations for the National Zone, Region or Metropolitan Area that they have indicated where they are interested in providing their services. It is proposed that suppliers will manage this within the Supplier Module of the Centralized Professional Services System (CPSS).

For requirements where all Suppliers must be invited or where the Identified User has decided to invite all Suppliers, all Suppliers will be eligible to bid on the bid solicitation.

C3.4 Financial Arrangement

It is proposed that the Learning Services SA will not contain Ceiling Rates, as is the current practice. Suppliers will still be required to submit a firm all inclusive per diem rate and/or a firm price and/or firm unit price as required through the subsequent competitive bid solicitations.

SECTION "D"
QUESTIONS FOR INDUSTRY

The respondent is requested to provide comments/feedback on the following set of questions / statements preferably in the order in which they appear.

D1.0 GENERAL

D1.1 A brief corporate profile of the respondent (or the actual or intended respondent consortium), the size of your organization (in accordance with the definition below), membership in a trade / industry association(s), as well as, a name and phone number of a contact person, and an indication of level of interest in a potential RFSO and/or RFSA in whole or in part.

Micro Business:	1-4 employees
Small Business:	5 - 50 employees
Medium Business:	51 – 499 employees
Large Business:	>= 500 employees

D1.2 In addition, the profile should clarify which streams or what aspects of a Stream the respondent can deliver with respect to Learning Services in the respective regions and sub-regions

D2.0 STATEMENT OF REQUIREMENTS

D2.1 General

a. Do you have any concerns with respect to the tasks and/or deliverables? If so, please outline your concern(s) and any recommendations to resolve them.
b. Do you have any concerns with the Occupational Minimum Mandatory Qualifications? If so, please outline your concern(s) and any recommendations to resolve them

D2.2 Additional Services

a. Are there any additional services that are apart of the training development cycle that we should considering adding to Learning Services?

   i) If so, what tasks and/or deliverables would be appropriate?
   ii) If so, what Levels and Qualifications would be appropriate?

b. Are there any additional categories within the existing Streams that we should consider adding to Learning Services?

   i) If so, to which Stream?
   ii) If so, what tasks and/or deliverables would be appropriate?
   iii) If so, what Levels and Qualifications would be appropriate?

D3.0 EVALUATION CRITERIA

D3.1 Proposed Changes

a. With compliance under Stream 5, Quality Assurance, Offerors may choose which resource category they wish to include in their SO/SA (1 of 3, 2 of 3 or 3 of 3 respective resource categories (QA Specilist, Senior Tester, Junior Tester).
b. Remove M.2(f)2) from the Mandatory Technical Evaluation Criteria to allow Stream 6, Multi-Media Design and Development to be less restrictive.
c. Remove M.2.(g)2) from the Mandatory Technical Evaluation Criteria as it is too restrive to have Corporate criteria for Project Management experience of an end-to-end eLearning Product. If a client requires a Project Manager for eLearning, the mandatory minimum resource qulaifications for a Project Manager will ensure that the resource has eLearning experience.

D3.2 General

a. Are there any comments and/or concerns with any of the Mandatory Criteria that make this requirement too restrictive and/or unrealistic? If so, what alternative solution would address your concern(s)?

D3.3 Additional Comments / Concerns

a. Do you have any additional comments, concerns, and/or alternate solutions with respect to the Evaluation Criteria?

D4.0 EVALUATION OF FINANCIAL OFFER

a. Do you have any comments and/or concerns with the approach of accepting all Financial Offers? If so, would the approach of rejecting all Financial Offers that are minus 40% of the Median and plus 40% of the median be the solution?

D4.1 Additional Comments / Concerns

a. Do you have any additional comments, concerns, and/or alternate solutions with respect to the Evaluation of Financial Offers?

D5.0 PROCUREMENT STRATEGY

D5.1 National Zone, Region and Metropolitan Areas

a. It is requested that Suppliers in response to this RFI complete Annex “D” indicating which Locations of work you are capable of providing services to clients.

b. Is it necessary for the Learning Services SOSA to have “Regional” pricing? How is the majority of the work completed for Federal Government Clients? Is the majority of the work completed at the Contractor’s facility or is the majority of the work completed at the Client’s facility and/or requires substantial in-person access to the Client?

D5.2 Additional Comments / Concerns

a. Are there any comments and/or concerns with respect to the proposed Procurement Strategy identified in Section “C”? If so, what alternative solution would address your concern(s)?

D6.0 ADDITIONAL COMMENTS

D6.1 Are there any additional comments and/or concerns with respect to this proposed procurement that has not been addressed elsewhere? If so, what alternative solution(s) would address your concern(s)?

D6.2 Are there any issues / challenges that have been encountered with the existing Learning Services Standing Offer and Supply Arrangement? If so, what alternative solution(s) would address your concern(s)?

ANNEX "A"
REQUIREMENTS

1.0 Scope

1.1 Background

1.1.1 The Professional Services requested are intended to secure access to suppliers who are experienced at providing Learning services. This will be the prime vehicle used for the acquisition of Traditional Classroom Learning, Blended Learning, and eLearning product development services. This includes the development of new Learning requirements and for the updating and converting existing learning & eLearning products.

1.1.2 Learning development services includes any or all of the following services:

a. Stream 1 – Strategic Learning Advisory Services
b. Stream 2 – Instructional Design and Development Services
c. Stream 3 – Custom eLearning Product Programming
d. Stream 4 – Rapid eLearning Product Programming
e. Stream 5 – Quality Assurance
f. Stream 6 – Multi-Media Design and Development;
g. Stream 7 – Project Management;
h. Stream 8 – Training Delivery

1.2 Language Requirement

1.2.1 The Offeror / Supplier will be requested to provide services in either the English or French language, or both, in accordance with each individual requirement.

2.0 Applicable Documents

2.1 The following documents form part of requirements to the extent specified herein, and are supportive of the Requirements when referenced in section 3 – Requirements. All other document references are to be considered supplemental information only.

a. Appendix1 - Description of Blended Learning and eLearning;
b. Appendix2 - Acronyms;
c. Shareable Content Object Reference Model (SCORM) (www.adlnet.org);
d. Common Look and Feel Guidelines (http://www.cio-dpi.gc.ca/clf-upe/index_e.asp);
e. Web Content Accessibility Guidelines (WCAG) http://www.w3.org/WAI/intro/wcag20.php

2.2 In addition to the documents specified in 2.1 above, the following documents form part of the requirements for requirements from the Department of National Defence where referenced in section 3.

a. DLN Content Development Guide (Current version will be provided with the call-up / contract);
b. Canadian Forces Individual Training and Education System (CFITES) Manuals http://cda-acd.mil.ca/DTE/engraph/ITEpolicy/keydocs_e.asp.

* Note for Suppliers: web link is only accessible by DND personnel. It is the responsibility of the supplier to request a copy of the applicable documents for each DND requirement from ncr.learningservicessosa@tpsgc-pwgsc.gc.ca.

2.3 Additional applicable documents may be included with individual requirements.

3.0 REQUIREMENTS

3.1 Stream 1 – STRATEGIC LEARNING ADVISORY SERVICES

3.1.1 Strategic Learning Advisor

3.1.1.1 Tasks of the Strategic Learning Advisor include, but are not limited to:

a. Research Services:

i. Monitoring the latest developments in technology and providing recommended directions to support the appropriate technical solutions for the learning products being developed;

ii. Determining what technology and tools are available, ready and useful, and that meet the learners needs and performance objectives;

iii. Researching and advising on suitability of new learning technologies for adoption;

iv. Developing standards and processes for new learning technologies;

v. Performing Vendor Analysis;

vi. Researching and recommending implementation and evaluation strategies for introduction of new learning technologies.

b. Strategic Advisory Services:

i. Conducting strategic analysis in support of learning initiatives, including gathering and consolidating relevant data / information through needs assessments and environmental scans

ii. Analyzing existing capabilities and requirements, developing redesigned frameworks and recommending areas for improved capability;

iii. Developing and documenting statement of requirements for learning technologies;

iv. Developing standards and processes for learning products;

v. Developing service and administration management strategies for learning products; and

vi. Performing eLearning and/or blended learning readiness studies.

3.1.1.2 Deliverables may include but are not limited to:

a. Research Services

i. Needs Assessment
ii. Technology Assessment
iii. Market Scans and Vendor Analysis
iv. New Technology Business Cases

v. Standards and Processes Documents
vi. Implementations Plans
vii. Briefings / Presentations

b. Strategic Advisory Services

i. Strategic Plans
ii. Business Plans
iii. Business Cases
iv. Capability Assessments
v. Statement of Requirements;
vi. Readiness Reports;
vii. Learning Technology Strategy Reports

3.1.1.3 OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS

A. SENIOR STRATEGIC LEARNING ADVISOR

No.	Description of Criteria
M.1	Must have a graduate university degree with a Major in one of the following fields: Education, Adult Learning, Distance Learning, or eLearning.
M.2	Must have a minimum of five (5) years experience as a Strategic Learning Advisor.
M.3	If eLearning is expected to be a part of the requirement, must have a minimum of two (2) years experience as a Strategic Learning Advisor where eLearning was part of the requirement.

OR

No.	Description of Criteria
M.1	Must have an undergraduate university degree with a Major in one of the following fields: Education, Adult Learning, Distance Learning, or eLearning.
M.2	Must have a minimum of seven (7) years experience as a Strategic Learning Advisor.
M.3	If eLearning is expected to be a part of the requirement, must have a minimum of two (2) years experience as a Strategic Learning Advisor where eLearning was part of the requirement.

OR

No.	Description of Criteria
M.1	Must have a college diploma (in any field) or university degree (in any field).
M.2	Must have a minimum of nine (9) years experience in instructional design.
M.3	If eLearning is expected to be a part of the requirement, must have a minimum of two (2) years experience as a Strategic Learning Advisor where eLearning was part of the requirement.

B. INTERMEDIATE STRATEGIC LEARNING ADVISOR

No.	Description of Criteria
M.1	Must have a graduate university degree with a Major in one of the following fields: Education, Adult Learning, Distance Learning, or eLearning.
M.2	Must have a minimum of one (1) year experience as a Strategic Learning Advisor.
M.3	If eLearning is expected to be a part of the requirement, must have a minimum of one (1) year experience as a Strategic Learning Advisor where eLearning was part of the requirement.

OR

No.	Description of Criteria
M.1	Must have an undergraduate university degree with a Major in one of the following fields: Education, Adult Learning, Distance Learning, or eLearning.
M.2	Must have a minimum of three (3) years experience as a Strategic Learning Advisor.
M.3	If eLearning is expected to be a part of the requirement, must have a minimum of one (1) year experience as a Strategic Learning Advisor where eLearning was part of the requirement.

OR

No.	Description of Criteria
M.1	Must have a college diploma (in any field) or university degree (in any field).
M.2	Must have a minimum of five (5) years experience as a Strategic Learning Advisor.
M.3	If eLearning is expected to be a part of the requirement, must have a minimum of one (1) year experience as a Strategic Learning Advisor where eLearning was part of the requirement.

C. JUNIOR STRATEGIC LEARNING ADVISOR

No.	Description of Criteria
M.1	Must have an undergraduate university degree (in any field).
M.2	Must have a minimum of one (1) year experience as a Strategic Learning Advisor.
M.3	If eLearning is expected to be a part of the requirement, must have a minimum of six (6) months experience as a Strategic Learning Advisor where eLearning was part of the requirement.

OR

No.	Description of Criteria
M.1	Must have a college degree (in any field).

M.2	Must have a minimum of three (3) years experience as a Strategic Learning Advisor.
M.3	If eLearning is expected to be a part of the requirement, must have a minimum of six (6) months experience as a Strategic Learning Advisor where eLearning was part of the requirement.

3.2.0 Stream 2 - Instructional Design & Development Services

3.2.1 Instructrional Designer

3.2.1.1 Tasks of an Instructional Designer include, but are not limited to:

a. Conducting needs assessments in order to examine human performance issues IAW CFITES vol 2, or equivalent, including:
   i. Conducting performance analyses;
   ii. Conducting cause analyses; and
   iii. Identifying solutions and making recommendations.

b. Assisting in specifying the required training and education outcomes in terms of essential on-job performance IAW CFITES vol 3, or equivalent, including:
   i. Performing job task analysis;
   ii. Specifying performance/education/learning objectives (POs/EdOs/LOs); and
   iii. Producing Qualification Standards (QSs)/ Knowledge standards (KS).

c. Describing and/or selecting an instructional program IAW CFITES vol 4 and 7, and Defence Learning Network Courseware Development Guidelines, or equivalent including:
   i. Defining learner characteristics;
   ii. Performing instructional and learning paths analysis;
   iii. Preparing learning assessment plans;
   iv. Designing learning assessment instruments;
   v. Identifying and costing instructional/blended learning strategies;
   vi. Specifying instructional strategies;
   vii. Specifying learning content and lesson guidance; and
   viii. Producing lesson guidance documentation (design guidance documents and scripted storyboards).

d. Producing effective Learning instructional materials IAW CFITES vol 5, and Defence Learning Network Courseware Development Guidelines, or equivalent including:
   i. Identifying training/performance requirements and determining sources of Learning materials;
   ii. Making recommendations on the procurement of instructional materials;
   iii. Developing style guides;
   iv. Producing instructional Learning materials;
   v. Conducting beta testing and formative evaluations of Learning instructional material to ensure compliance with specified standards and client requirements, and revising as required;
   vi. Design of student evaluation must ensure correct level. Evaluation should consider level at which students will be required to perform and include level at appropriate level of Bloom's taxonomy;

vii. Preparing Instructors for the use / implementation of Learning instructional materials into training programs; and
viii. Recording development costs of Learning instructional materials.

e. Evaluating instructional materials for possibility of conversion to eLearning in whole or in part IAW Defence Learning Network Courseware Development Guidelines, or equivalent and provide cost estimates of level of effort to convert legacy courseware to eLearning.

3.2.1.2 Deliverables may include but are not limited to:

i. Needs Assessment Report;
ii. Qualification Standard (QS);
iii. Training Plan (TP) or curriculum;
iv. Design Guidance Document;
v. Final Scripted Storyboards;
vi. Style guides;
vii. Learning instructional materials; and
viii. Evaluation Report.

3.2.1.3 OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS

A. SENIOR INSTRUCTIONAL DESIGNER

No.	Description of Criteria
M.1	Must have a graduate university degree with a Major in one of the following fields: Education, Adult Learning, Distance Learning, or eLearning.
M.2	Must have a minimum of five (5) years experience in instructional design.
M.3	If eLearning is part of the requirement, must have a minimum of two (2) years experience in the instructional design of eLearning product(s).

OR

No.	Description of Criteria
M.1	Must have an undergraduate university degree with a Major in one of the following fields: Education, Adult Learning, Distance Learning, or eLearning.
M.2	Must have a minimum of seven (7) years experience in instructional design.
M.3	If eLearning is part of the requirement, must have a minimum of two (2) years experience in the instructional design of eLearning product(s).

OR

No.	Description of Criteria
M.1	Must have a college diploma (in any field) or university degree (in any field).
M.2	Must have a minimum of nine (9) years experience in instructional design.
M.3	If eLearning is part of the requirement, must have a minimum two (2) years experience in the instructional design of eLearning product(s).

B. INTERMEDIATE INSTRUCTIONAL DESIGNER

No.	Description of Criteria
M.1	Must have a graduate university degree with a Major in one of the following fields: Education, Adult Learning, Distance Learning, or eLearning.
M.2	Must have a minimum of one (1) year experience in instructional design..
M.3	If eLearning is part of the requirement, must have a minimum of one (1) years experience in the instructional design of eLearning product(s).

OR

No.	Description of Criteria
M.1	Must have an undergraduate university degree with a Major in one of the following fields: Education, Adult Learning, Distance Learning, or eLearning..
M.2	Must have a minimum of three (3) years experience in instructional design..
M.3	If eLearning is part of the requirement, must have a minimum of one (1) years experience in the instructional design of eLearning product(s).

OR

No.	Description of Criteria
M.1	Must have a college diploma (in any field) or university degree (in any field).
M.2	Must have a minimum of five (5) years experience in instructional

	design.
M.3	If eLearning is part of the requirement, must have a minimum of one (1) years experience in the instructional design of eLearning product(s).

C. JUNIOR INSTRUCTIONAL DESIGNER

No.	**Description of Criteria**
M.1	Must have an undergraduate university degree (in any field).
M.2	Must have a minimum of one (1) year experience in instructional design.
M.3	If eLearning is part of the requirement, must have a minimum of six (6) months experience in the instructional design of eLearning product(s).

OR

No.	**Description of Criteria**
M.1	Must have a college degree (in any field).
M.2	Must have a minimum of three (3) years experience in instructional design.
M.3	If eLearning is part of the requirement, must have a minimum of six (6) months experience in the instructional design of eLearning product(s).

3.2.2 Content Subject Matter Expert (SME)

3.2.2.1 Tasks of the Content Subject Matter Expert include, but are not limited to:

a. Verifying the scope of the content requirements;
b. Identifying the content, including identifying source material and reference items, such as books, articles, videotapes, and static media;
c. Editing and proofreading the content before and after implementation;
d. Reviewing the design documents, scripts, and the final deliverable to verify content accuracy.

3.2.2.2 Deliverables may include but are not limited to:

a. Subject Matter Content.

3.2.2.3 OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS

A. SENIOR CONTENT SUBJECT MATTER EXPERT

No.	Description of Criteria
M.1	Must have a minimum of ten (10) years experience in the content area related to the requirement.

B. INTERMEDIATE CONTENT SUBJECT MATTER EXPERT

No.	Description of Criteria
M.1	Must have a minimum of seven (7) years experience in the content area related to the requirement.

C. JUNIOR CONTNET SUBJECT MATTER EXPERT

No.	Description of Criteria
M.1	Must have a minimum of five (5) years experience in the content area related to the requirement.

3.2.3 **Technical Writing**

3.2.3.1 Tasks of the Technical Writer include, but are not limited to:

a. Verifying scope of the content;
b. Performing and end user analysis;
c. Conducting research and analysis of the information provided;
d. Writing theoretical and procedural content based;
e. Editing copy
f. Creating manuals;
g. Reviewing, editing and proofreading material;
h. Reviewing accuracy and usability of written material

3.2.3.2 Deliverables may include but are not limited to:

a. Student Manuals
b. User Manuals
c. Guidebooks

3.2.3.3 OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS

A. SENIOR TECHNICAL WRITER

No.	Description of Criteria
M.1	Must have a college diploma (in any field) or university degree (in any field).

M.2	Must have a minimum of **nine (9)** years experience as a Technical Writer.

B. INTERMEDIATE TECHNICAL WRITER

No.	Description of Criteria
M.1	Must have a college diploma (in any field) or university degree (in any field).
M.2	Must have a minimum of **five (5)** years experience as a Technical Writer.

C. JUNIOR TECHNICAL WRITER

No.	Description of Criteria
M.1	Must have a college diploma (in any field) or university degree (in any field).
M.2	Must have a minimum of **three (3)** years experience as a Technical Writer.

3.3.0 Stream 3 – Custom eLearning Product Programming

3.3.1 Tasks of a Custom eLearning Product Programmer include, but are not limited to:

a. Reviewing, analyzing and making recommendations with respect to programming issues on project documentation including:

i. Coding standard(s) chosen;

ii. Client Needs Assessment; and
iii. Infrastructure topology.

b. Developing advanced project components, including:

i. A User Interface in accordance with the Style Guide;

ii. Pseudo-code and metadata templates;
iii. Advanced JavaScript course elements;
iv. All course elements and related assets;
v. SCO and Asset Metadata documents;
vi. SCORM® conformance and usability testing;
vii. Quality assurance testing; and
viii. A Maintenance Guide that provides information relevant to modifying and maintaining the end products.

c. Coding / programming eLearning product elements in accordance with the Instructional Design Document(s), including:

i. Multi-Media elements;

ii. Interactive elements;
iii. Instruction content elements;
iv. Shareable Content Objects (SCOs);
v. Assessment instruments; and

vi. Evaluation instruments.

d. Designing and Developing data structure, including:

i. Designing database structures and relationships; and
ii. Documenting database implementation including connection details.

e. Implementing quality assurance and test plans;

f. Providing technical guidance including:

i. Recommending best practices;
ii. Making recommendations regarding eLearning product development;
iii. Identifying and recommending solutions to identified coding issues;
iv. Reviewing test documentation; and
v. Documenting solutions or work-arounds to identified issues.

3.3.2 Deliverables may include but are not limited to:

a. User Interface;
b. Prototype SCO for testing with SCORM Test Logs;
c. XML, XSLT, and XHTML based templates;
d. Alpha, Beta, and Final versions of eLearning Products
e. SCORM conformant course w/SCORM Test Logs
f. Maintenance Guide that provides detailed instructions on maintenance and modification of eLearning products; and
g. Interactive Multimedia Objects.

3.3.3 OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS

A. SENIOR CUSTOM ELEARNING PRODUCT PROGRAMMER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of seven (7) years experience in programming web-based applications using Java, C-based language, or a scripting language, as well as, database and/or file structured back-ends.
M.3	Must have developed and packaged a minimum of four (4) CBT and/or WBT courses within the last four (4) years.
M.4	Must have optimized for performance including Multi-Media assets audio, video, or still images for a minimum of four (4) eLearning products.
M.5	If SCORM is required as part of the requirement, then must have developed SCORM Conformant content (any version, including content packages and metadata) for a minimum of nine (9) SCORM courses within the last three (3) years.

B. INTERMEDIATE CUSTOM ELEARNING PRODUCT PROGRAMMER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of three (3) years experience in programming web-based applications using Java, C-based language, or a scripting language, as well as, database and/or file structured back-ends.
M.3	Must have developed and packaged a minimum of two (2) CBT and/or WBT courses within the last three (3) years.
M.4	Must have optimized for performance including Multi-Media assets audio, video, or still images for a minimum of (2) eLearning products; and
M.5	If SCORM is required as part of the requirement, then must have developed SCORM Conformant content (any version as specified by the client, including content packages and metadata files) for a minimum of two (2) SCORM courses within the last three (3).

C. JUNIOR CUSTOM ELEARNING PRODUCT PROGRAMMER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of one (1) year experience in programming web-based applications using Java, C-based language, or a scripting language, as well as, database and/or file structured back-ends.
M.3	Must have developed and packaged a minimum of one (1) CBT or WBT course within the last three (3) years.
M.4	Must have optimized for performance including Multi-Media assets audio, video, or still images for a minimum of one (1) eLearning products.
M.5	If SCORM is required as part of the requirement, then must have developed SCORM Conformant content (any version as specified by the client, including content packages and metadata files) for a minimum of one (1) SCORM courses within the last three (3) years.

OR

No.	Description of Criteria
M.1	Must have a Secondary School diploma.

M.2	Must have a minimum of three (3) years experience in programming web-based applications using Java, C-based language, or a scripting language, as well as, database and/or file structured back-ends.
M.3	Must have developed and packaged a minimum of one (1) CBT or WBT course within the last three (3) years.
M.4	Must have optimized for performance including Multi-Media assets audio, video, or still images for a minimum of one (1) eLearning products.
M.5	If SCORM is required as part of the requirement, then must have developed SCORM Conformant content (any version as specified by the client, including content packages and metadata files) for a minimum of one (1) SCORM courses within the last three (3) years.

3.4 Stream 4 – Rapid eLearning Product Programming

3.4.1 Rapid eLearning Product Programmer

3.4.1.1 Tasks of a Rapid eLearning Product Programmer resource include, but are not limited to:

a. Creating multimedia animation using images, sound, and video;

b. Using authoring software to assemble eLearning content and publish the course in accordance with the Instructional Design Document(s);

c. Designing and creating interactions that are packaged in a rapid eLearning software;

d. Troubleshooting and resolving online course interactions that are not publishing correctly or reporting correctly to a Learning Management system;

e. Working with instructional designers to develop the content based on storyboards;

f. Providing advice on the suitable interaction and also on the limits of certain applications;

g. Creating reusable online content;

3.4.1.2 Deliverables may include but are not limited to:

a. Alpha, Beta, and Final versions of eLearning Products;
b. SCORM conformant course; and
c. Maintenance Guide that provides detailed instructions on maintenance and modification of eLearning products.

3.4.1.3 <u>OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS</u>

A. SENIOR RAPID ELEARNING PRODUCT PROGRAMMER

No.	Description of Criteria

M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have developed a minimum of five (5) eLearning courses in the last two (2) years using rapid eLearning tools (as specified by the client, such as Adobe Illustrator, Adobe Photoshop, Adobe Captivate, Adobe Dreamweaver, Adobe Contribute, HTML, CSS, Adobe Flash and/or Articulate by Techsmith)
M.3	If SCORM is required as part of the requirement, then must have developed SCORM Conformant content (any version as specified by the client, including content packages and metadata files) for a minimum of three (3) SCORM courses within the last two (2) years.

B. INTERMEDIATE RAPID ELEARNING PRODUCT PROGRAMMER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have developed a minimum of four (4) eLearning courses in the last two (2) years using rapid eLearning tools (as specified by the client, such as Adobe Illustrator, Adobe Photoshop, Adobe Captivate, Adobe Dreamweaver, Adobe Contribute, HTML, CSS, Adobe Flash and/or Articulate by Techsmith)
M.3	If SCORM is required as part of the requirement, then must have developed SCORM Conformant content (any version as specified by the client, including content packages and metadata files) for a minimum of two (2) SCORM courses within the last two (2) years.

C. JUNIOR RAPID ELEARNING PRODUCT PROGRAMMER

No.	Description of Criteria
M.1	Must have a minimum of Secondary School Diploma.
M.2	Must have developed a minimum of three (3) eLearning courses in the last two (2) years using rapid eLearning tools (as specified by the client, such as Adobe Illustrator, Adobe Photoshop, Adobe Captivate, Adobe Dreamweaver, Adobe Contribute, HTML, CSS, Adobe Flash and/or Articulate by Techsmith)
M.3	If SCORM is required as part of the requirement, then must have developed SCORM Conformant content (any version as specified by the client, including content packages and metadata files) for a minimum of one (1) SCORM course within the last two (2) years.

3.5.0 Stream 5 - Quality Assurance

3.5.1 Tasks of a Quality Assurance resource include, but are not limited to:

a. Developing a Quality Assurance (QA) plan, including:

i. Quality standards, methodologies, procedures and tools for performing the quality assurance activities

ii. Resources, schedule and responsibilities for conducting the QA activities; and

iii. Selected activities and tasks for supporting processes, such as verification, validation, joint review, audit and problem resolution

b. Developing quality assurance test plan(s), including alpha, beta and pilot testing;

c. Implementing Quality Assurance test plan(s), including:

i. Testing eLearning programs for conformity to client approved design documents, instructional standards, guidance and specifications, scripts and storyboards;
ii. Testing the eLearning program for interactivity, functionality and programming bugs;
iii. Assuring grammatical and spelling accuracy in English, French, or both languages in accordance with the requirement;
iv. Ensuring consistency throughout the Learning product in presentation and style including use of colors, fonts, formats, navigation architecture & strategy, modularization, consistency between English and French versions;
v. Ensuring consistency with guidelines, conventions, taxonomies and / or best practice in the use of metadata; and
vi. Testing for SCORM conformance in an approved LMS/LCMS testing environment;
vii. Performing testing of eLearning programs to ensure they function as planned in the client LMS/LCMS environment; and
viii. Recording the results of all QA interventions and making them available to the Technical Authority.

d. Writing reports based upon the results of the QA Test Plan.

3.5.2 Deliverables may include but are not limited to:

a. QA Plan
b. Product QA tests and test plans
c. Product QA test reports

3.5.3 OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS

A. QUALITY ASSURANCE SPECIALIST

No.	Description of Criteria
M.1	Must have a minimum of three (3) years of experience in developing QA policies, plans, procedures and metrics.
M.2	Must have a minimum of three (3) years of experience in developing software development standards.
M.3	Must have a minimum of three (3) years of experience in managing the QA process.

B. SENIOR TESTER

No.	Description of Criteria
M.1	Must have a minimum of four (4) years of experience with eLearning products in conducting testing in accordance with Test Plans.
M.2	Must have a minimum of four (4) years of experience with eLearning products in supervision of testing.

M.3	Must have a minimum of four (4) years of experience with eLearning products in management of test plans derived by the QA process.
M.4	Must have a minimum of four (4) years of experience with eLearning products in establishing testing procedures.
M.5	Must have a minimum of four (4) years of experience with eLearning products in development of test scenarios and test scripts.
M.6	Must have a minimum of four (4) years of experience with eLearning products in establishing a validation and verification capability.
M.7	If SCORM is required as part of the requirement, then must have tested SCORM Conformant content (any version, including content packages and metadata files) for a minimum of six (6) SCORM courses within the last three (3) years.

C. JUNIOR TESTER

No.	Description of Criteria
M.1	Must have a minimum of two (2) years of experience with eLearning products in conducting testing in accordance with Test Plans.
M.2	Must have a minimum of two (2) years of experience with eLearning products in supervision of testing.
M.3	Must have a minimum of two (2) years of experience with eLearning products in developing test plans.
M.4	Must have a minimum of two (2) years of experience with eLearning products in development of test scenarios and test scripts.
M.5	Must have a minimum of two (2) years of experience with eLearning products in establishing a validation and verification capability.
M.6	If SCORM is required as part of the requirement, then must have tested SCORM Conformant content (any version, including content packages and metadata files) for a minimum of three (3) SCORM courses within the last three (3) years.

3.6.0 Stream 6 - Multi-Media Design & Development

3.6.1 Graphic Design

3.6.1.1 Tasks of a Graphic Designer include, but are not limited to:

a. Determine the best way to achieve the desired graphics either through the use of existing stock, development of new material, or combination of both;

b. Consulting with clients to establish the overall look and graphical elements;

c. Reviewing the Presentation Design Document and/or the Scripted Storyboards and making recommendations to the Instructional Designer(s) and/or client; including:

   i. Consulting the clients regarding associated costs;

ii. Validating that the design is engaging and meets the client requirements.

d. Create designs, concepts, and sample layouts of graphical elements in accordance with the Presentation Design Documents and the Scripted Storyboards.

e. Determine size and arrangement of illustrative material and copy, and select style and size of type;
f. Create new images using computer software;
g. Mark up, paste, and assemble final layouts
h. Digitizing images

3.6.1.2 Deliverables may include but are not limited to:

a. Graphic Concepts

b. Graphics
c. Sample Layouts
d. Final Layouts
e. Multimedia Graphic Objects

3.6.1.3 OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS

A. SENIOR GRAPHICS DESIGNER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of three (3) years of experience within the last five (5) years as a Graphic Designer.

B. INTERMEDIATE GRAPHICS DESIGNER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of three (3) years of experience within the last five (5) years as a Graphic Designer.

C. Junior Graphics Designer

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of one (1) year of experience within the last five (5) years as a Graphic Designer.

OR

No.	Description of Criteria
M.1	Must have a Secondary School diploma.

M.2	Must have a minimum of three (3) years of experience within the last five (5) years as a Graphic Designer.

3.6.2 Photography

3.6.2.1 Tasks of a Photographer include, but are not limited to:

a. Determine the best way to achieve the desired Photographs either through the use of existing stock, development of new material, or combination of both;
b. Use traditional or digital cameras to take pictures either in a studio or on location;
c. Adjust apertures, shutter speeds, and camera focus based on a combination of factors such as lighting, field depth, subject motion, film type, and film speed;
d. Determine desired images and picture composition; and select and adjust subjects, equipment and/or lighting to achieve desired result;
e. Scan photographs into computers for editing, storage, and/or electronic transmission;
f. Measure light levels, distances, and numbers of exposures needed;
g. Manipulate and enhance scanned and/or digital images to create desired effects, using computers and specialized software.
h. Reviewing the Presentation Design Document and/or the Scripted Storyboards and making recommendations to the Instructional Designer(s) and/or client; including:
   i. Consulting the clients regarding associated costs;
   ii. Validating that the design is engaging and meets the client requirements.

3.6.2.2 Deliverables may include but are not limited to:

a. High quality photos;
b. Web-ready photos and thumbnails;
c. Panoramic photos;
d. Virtual spaces;

3.6.2.3 <u>OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS</u>

A. PHOTOGRAPHER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of three (3) years of experience within the last six (6) years as a Photographer.

OR

No.	Description of Criteria
M.1	Must have a Secondary School diploma.
M.2	Must have a minimum of five (5) years of experience within the last eight (8) years as a Photographer.

3.6.3 Animator

3.6.3.1 Tasks of an Animator include, but are not limited to:

a. Determine the best way to achieve the desired animation either through the use of existing stock, development of new material, or combination of both;

b. Design and create two-dimensional and three-dimensional images depicting objects in motion and/or illustrating a process, using computer animation or modelling programs;

c. Make objects or characters appear lifelike by manipulating light, colour, texture, shadow, and transparency to give the illusion of motion;

d. Create Storyboards that show the flow of the animation and map out key scenes and/or characters;

e. Reviewing the Presentation Design Document and/or the Scripted Storyboards and making recommendations to the Instructional Designer(s) and/or client; including: Create Storyboards that show the flow of the animation and map out key scenes and/or characters;

  i. Consulting the clients regarding associated costs;

  ii. Validating that the design is engaging and meets the client requirements.

3.6.3.2 Deliverables may include but are not limited to:

a. 2D and 3D animations;

b. Serious gaming objects, such as avatars, systems, and landscapes;

3.6.3.3 OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS

A. SENIOR ANIMATOR

No.	**Description of Criteria**
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of five (5) years of experience within the last eight (8) years as an Animator.

B. INTERMEDIATE ANIMATOR

No.	**Description of Criteria**
M.1	Must have a University degree (in any field) or College Diploma (in any field).
M.2	Must have a minimum of three (3) years of experience within the last six (6) years as an Animator.

C. JUNIOR ANIMATOR

No.	**Description of Criteria**
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of one (1) year of experience within the last six (6) years as an Animator.

OR

No.	Description of Criteria
M.1	Must have a Secondary School diploma.
M.2	Must have a minimum of three (3) years of experience within the last six (6) years as an Animator.

3.6.4 Video Production

3.6.4.1 Tasks of a Video Producer include, but are not limited to:

a. Determine the best way to achieve the desired video either through the use of existing stock, development of new material, or combination of both;

b. Cut shot sequences to different angles at specific points in scenes in order to make individual cuts fluid and seamless;
c. Edit video to insert music, dialogue, and/or sound effects;
d. Select and combine scenes to form a logical and smoothly running story;
e. Determine the specific audio and visual effects, and/or music necessary to complete the video;
f. Reviewing the Presentation Design Document and/or the Scripted Storyboards and making recommendations to the Instructional Designer(s) and/or client; including:

i. Consulting the clients regarding associated costs;

ii. Validating that the design is engaging and meets the client requirements.

3.6.4.2 Deliverables may include but are not limited to:

a. High quality video;

b. Web-ready video;

3.6.4.3. <u>OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS</u>

A. VIDEO PRODUCER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of three (3) years of experience within the last six (6) years as a Video Producer.

OR

No.	Description of Criteria
M.1	Must have a Secondary School diploma.
M.2	Must have a minimum of five (5) years of experience within the last eight (8) years as a Video Producer.

3.6.5 Audio Production

3.6.5.1 Tasks of an Audio Producer include, but are not limited to:

a. Determine the best way to achieve the desired audio, sound bite, music, sound effects, and/or audio clip either through the use of existing stock, development of new material, or combination of both;
b. Record speech, music, and other sounds
c. Regulate volume level and sound quality during recording sessions;
d. Mix and edit voices, music, sound effects;
e. Separate instruments, vocals, and other sounds, then combine later during the mixing or post production stage;
f. Synchronize and equalize pre-recorded dialogue, music, and sound effects with animation, video, and/or into the learning product;
g. Reviewing the Presentation Design Document and/or the Scripted Storyboards and making recommendations to the Instructional Designer(s) and/or client; including:
    i. Consulting the clients regarding associated costs;
    ii. Validating that the design is engaging and meets the client requirements.

3.6.5.2 Deliverables may include but are not limited to:

a. High quality audio;
b. Web-ready audio;

3.3.5.3 OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS

A. AUDIO PRODUCER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of three (3) years of experience within the last six (6) years as an Audio Producer.

OR

No.	Description of Criteria
M.1	Must have a Secondary School diploma.
M.2	Must have a minimum of five (5) years of experience within the last eight (8) years as an Audio Producer.

3.6.6 Multimedia Director

3.6.6.1 Tasks of a Multimedia Director include, but are not limited to:

a. Determine the best way to achieve the desired audio, sound bite, music, sound effects, and/or audio clip either through the use of existing stock, development of new material, or combination of both;
b. Coordinate the work of camera and/or audio resource(s);
c. Coordinate with Video and/or Audio Producers during the post-production process;
d. Plan details such as framing, composition, camera movement, sound, and actor movement for each shot or scene;

e. Establish pace of programs and sequences of scenes according to time requirements and cast and set accessibility;
f. Select settings and locations for Video and determine how scenes will be shot in those settings;
g. Coordinate rehearsals and communicate the "approach, characterization, and movement" needed for each scene
h. Reviewing the Presentation Design Document and/or the Scripted Storyboards and making recommendations to the Instructional Designer(s) and/or client; including:
   i. Consulting the clients regarding associated costs;
   ii. Validating that the design is engaging and meets the client requirements.

3.6.6.2 Deliverables may include but are not limited to:

a. Production ready storyboards;
b. A finished multimedia eLearning product.

3.6.6.3 OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS

A. MULTIMEDIA DIRECTOR

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of one (1) year of experience within the last six (6) years as a Multimedia Director.

OR

No.	Description of Criteria
M.1	Must have a Secondary School diploma.
M.2	Must have a minimum of three (3) years of experience within the last six (6) years as Multimedia Director.

3.6.7 Narration

3.6.7.1 Tasks of a Narrator include, but are not limited to:

a. Performing the voice dialogue of scripted storyboards whereby the narrator communicates directly to the reader.
b. Performing the voice-over presentation to the audience (also known as off-camera or off-stage commentary).
c. Performing voice-acting activities, not limited to, animated characters for short films, video games, instructional videos, singing, etc.

3.6.7.2 Deliverables may include but are not limited to:

a. Sample audio recordings;
b. Final audio recordings;
c. Sample voice dialogue recordings;
d. Final voice dialogue recordings;

3.6.7.3 OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS

A. NARRATOR

No.	Description of Criteria
M.1	Must have a minimum of a Secondary School diploma, College diploma (in any field) or a University Degree (in any field).
M.2	Must have a minimum of one (1) year of experience within the last three (3) years as a Narrator.

3.7.0 Stream 7 - Project Management

3.7.1 Tasks of a Project Manager include, but are not limited to:

a. Managing the scope of the projects and products, budget and schedule;
b. Developing and updating the work breakdown structure and detailed project plans;
c. Tracking project plans and managing resources;
d. Managing the change control process;
e. Maintaining communication with government stakeholders and other project managers and reports progress of the project on an ongoing basis and at scheduled points in the life cycle;
f. Managing risks and implementing problem resolutions;
g. Planning, organizing, directing and controlling quality assurance throughout the project; and
h. Supporting the release, implementation and delivery of products.

3.7.2 Deliverables may include but are not limited to:

a. Work Breakdown Structure;
b. Project Plan; and
c. Project Status Reports.

3.7.3 OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS

A. SENIOR PROJECT MANAGER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or a College Diploma (in any field) or a Project Management Professional (PMP) certification from the Project Management Institute. www.pmi.org
M.2	Must have a minimum of six (6) years experience as a Project Manager, including three (3) years experience in managing training projects.
M.3	If eLearning is part of the requirement, then the Project Manager must have a minimum of three (3) years experience in managing eLearning and/or software projects, including a minimum of one (1) year of experience in managing eLearning projects.

B. INTERMEDIATE PROJECT MANAGER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or a College Diploma (in any field) or a Project Management Professional (PMP) certification from the Project Management Institute. www.pmi.org
M.2	Must have a minimum of four (4) years experience as a Project Manager, including two (2) years experience in managing training projects.
M.3	If eLearning is part of the requirement, then the Project Manager must have a minimum of two (2) years experience in managing eLearning and/or software projects, including a minimum of one (1) year of experience in managing eLearning projects.

C. JUNIOR PROJECT MANAGER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or a College Diploma (in any field) or a Project Management Professional (PMP) certification from the Project Management Institute. www.pmi.org
M.2	Must have a minimum of two (2) years experience as a Project Manager, including a minimum of one (1) year experience in managing training projects.
M.3	If eLearning is part of the requirement, then the Project Manager must have a minimum of two (2) years experience in managing eLearning and/or software projects, including a minimum of one (1) year of experience in managing eLearning projects.

3.8.0 Stream 8 – Training Delivery

3.8.1 Instructor

3.8.1.1 Instructors may be used to teach government owned training in any of the subject areas identified below. Subject areas are based upon the content and not the target population.

a. Human Resources;
b. Finance;
c. Management Skills;
d. Leadership Development;
e. Change Management;
f. Project Management;
g. Career Counselling;
h. Environment;
i. Energy Management;
j. Military Occupation Training;
k. Public Safety;
l. Health & Safety;
m. Information Technology;
n. General (subject area to be identified in the resulting call-up or bid solicitation)

3.8.1.2 Tasks of the Instructors include, but are not limited to:

a. Deliver the training in accordance with the course Lesson Plan, using appropriate Adult Education techniques
b. Setting up the classroom prior to the start of the scheduled start time;
c. Provide administrative briefing to participants at the beginning of the course outlining location of fire exits, washrooms, restaurant facilities, lunchroom area, and course outline.
d. Distribute attendance list to participants for their signature;
e. Evaluate tests and/or assignments;
f. Distribute course certificates to participants;
g. Distribute course evaluations to participants.
h. Provide any feedback and recommendations to the Project Authority regarding the course;
i. Set-up the online environment in accordance with the training plan.

3.8.1.3 Deliverables may include but are not limited to:

a. Course Feedback Report

3.8.1.4 OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS

A. SENIOR INSTRUCTOR

No.	Description of Criteria
M.1	Must have a minimum of one hundred and twenty (120) training days within the last three (3) years in Instructing in the identified subject area.
M.2	Must have a minimum of one (1) year experience (not as an Instructor) in the identified subject area..

B. INTERMEDIATE INSTRUCTOR

No.	Description of Criteria
M.1	Must have a minimum of sixty (60) training days within the last three (3) years in Instructing in the identified subject area.
M.2	Must have a minimum of one (1) year experience (not as an Instructor) in the identified subject area.

C. JUNIOR INSTRUCTOR

No.	Description of Criteria
M.1	Must have a minimum of thirty (30) training days within the last three (3) years in Instructing in the identified subject area.

3.8.2 **Training Facilitator**

a. Training Facilitators may be used to facilitate any government owned training that is delivered as in-person training facilitation (e.g. classroom), online facilitation, and for blended training facilitation (e.g. classroom and online).

3.8.2.1 **Definition of Online Facilitation**

a. Online Facilitation involves managing learners and learning through an online medium such as virtual classroom applications. It also refers to the management of online communication between learners by a facilitator. In this regard, online facilitation is moving from an emphasis on web content to a more interactive structure that recognizes the social and interactive elements of knowledge construction, and to pedagogical approaches that enable learner centred, rather than facilitator driven learning.

b. There are two main types of online facilitation:

i. **Asynchronous** – communications such as discussion forums, electronic bulletin boards and e-groups in which the facilitator acts as a moderator reviewing contributors message offline and posting administrative messages; and

ii. **Synchronous** – events in which the facilitator works in real time, leading or assisting in the delivery of instruction to learners within a virtual classroom application though lecture, discussion, interactive exercises, use of slides, whiteboard, application sharing and document review, and other tools and techniques commonly associated with virtual classroom applications.'

c. Means of online facilitation include, but are not limited to the following:

i. Virtual Classroom application software;
ii. Static Text;
iii. Threaded or unthreaded discussion boards;
iv. Instant Messaging (IM) or Chat;
v. Live voice or video;
vi. Provision of links to other materials or lists of materials;
vii. E-mail; and
viii. Non-virtual means, such as phone support.

3.8.2.2 Tasks of a Training Facilitator include, but are not limited to:

a. Becoming familiar with the course content prior to course delivery;
b. Attending train-the-training sessions, dry run and pilot tests;
c. Contribute suggestions towards course improvements or revisions;
d. Deliver training by:

i. Guiding learners through course materials and specific activities (e.g. problem solving, information sharing), and focusing on critical points;
ii. Critiquing work / thinking in a supportive fashion;
iii. Promoting interactivity and discussions;
iv. Maintaining a pace suitable to the course schedule;
v. Creating and fostering a collaborative and safe environment for participants;vi. Motivating learners to take responsibility for their own learning;
vii. Catering to different learning preferences and learner needs, finding the optimal balance between private e-mail and public discussions, and encouraging collaborative work and learner-learner or group discussions;
viii. Moderating and/or managing discussions, encouraging and gently guiding the discussion, planting ideas or starting new topics, and managing differences of opinion or perspectives effectively
ix. Sharing information and resources with the group;
x. Answering participants' questions and provide help when required.

e. Helping learners make the transition from private one-on-one e-mail to group participation;
f. Assisting learners to become comfortable with systems and software;
g. Scanning for copyrighted material that shouldn't be posted without permission of the author.

3.8.2.3 Deliverables may include but are not limited to:

a. Course Feedback Reports

3.8.2.4 <u>OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS</u>

A. SENIOR TRAINING FACILITATOR

No.	Description of Criteria
M.1	Must have delivered a minimum of one hundred and twenty (120) training days within the last three (3) years as a Training Facilitator
M.2	If online training facilitation is part of the requirement, then must have delivered a minimum of ninety (90) training hours within the last three (3) years as an Online Training Facilitator.

B. INTERMEDIATE TRAINING FACILITATOR

No.	Description of Criteria
M.1	Must have delivered a minimum of sixty (60) training days within the last three (3) years as a Training Facilitator
M.2	If online training facilitation is part of the requirement, then must have delivered a minimum of sixty (60) training hours within the last three (3) years as an Online Training Facilitator.

C. JUNIOR TRAINING FACILITATOR

No.	Description of Criteria
M.1	Must have delivered a minimum of thirty (30) training days within the last three (3) years as a Training Facilitator.
M.2	If online training facilitation is part of the requirement, then must have delivered a minimum of thirty (30) training hours within the last three (3) years as an Online Training Facilitator.

4.0 Deliverables - General

4.1 All documentation is to be provided in hard and/or soft copy, in the language of English or French, or both and in the format in specified with call-up / contract.

4.2 Call-ups / Contracts that specify that the eLearning products will be delivered by a LMS, must be tested and proved functional by the Offeror / Supplier prior to acceptance.

5.0 Management Requirements

5.1 Quality Assurance And Control Processes

5.1.1 As a minimum, the Offeror / Supplier must implement the Quality Assurance (QA) Plan, in order to ensure the quality of the services provided by the Offeror / Supplier. The following lists represent the acceptable criteria for eLearning products.

Level	Description
5 – System Level CATASTROPHIC	The entire application or system is unusable, catastrophic failure, usually requires restart or re-initialization or reboot.
4 – Sub-system / Module Level CRITICAL	A sub-system or module becomes unusable.
3 – Feature / Function Level SERIOUS	Feature or function does not work at all or aborts.
2 – Sub-Feature Level MINOR	A particular aspect of a function / feature does not function properly, but the overall feature / function is still usable.
1 – Formatting / Cosmetic SIMPLE	The layout or format of data, reports, messages, screens and other cosmetic issues require changing; no impact on usability. If there is an impact on usability, then the error may need to be reclassified at a higher level.

Acceptance Testing	
Validation Testing	No Level 5 errors by the start of System Testing
System Testing	No Level 4 errors by the start of Alpha Testing
Alpha Testing	No Level 3 errors by the start of Beta Testing
Release	Only Level 2 and Level 1 errors remain

5.2 Project Management

5.2.1 The Offeror / Supplier must provide status report(s) to the Technical Authority as and when requested and on the date(s) specified in the requirement, which must include as a minimum:

a. A summary of the work accomplished to date, using a Gantt chart. This summary must include the identification of personnel, and hours expended on each task, the progress report must highlight:

i. Tasks completed;
ii. Effort expended thus far;
iii. Estimate of additional work needed to complete the deliverable/task;
iv. Details of issues/problems encountered with proposed solutions;
v. Proposed changes to the work plan with reasons;
vi. Issues must be identified by one of three level indicators:

- GREEN - on schedule,
- YELLOW - minor issue that will not affect the deliverable date, and
- RED - major issues which may impact deliverables.

b. The Offeror / Supplier must schedule status meetings on a regular basis as defined during the project kick-off meeting.

6.0 Work Location

6.1 Unless specified otherwise in any resultant call-up / Contract, the Work will be performed at the Offeror / Supplier's own place of business or offices and the Offeror / Supplier must provide adequate work space, office equipment and must furnish its own test and development hardware and software prior to implementation, to ensure the uninterrupted flow of contracted services and related deliverables at no additional cost to Canada. The Client Department will provide access (if available) to the Pre-Production / Test environment to the Offeror / Supplier.

7.0 Location of Meetings

7.1 In the event that meetings are required under a project, they must be conducted at facilities provided by Canada or the Offeror / Supplier. In the later case, the Offeror / Supplier must provide all facilities and resources required for the conduct of the meeting, at no additional cost to Canada.

8.0 Network Access and Security

8.1 While working on any Government of Canada computer, server, or network, the Offeror / Supplier's personnel must abide by Internet and network access policies and codes of conduct (as provided at the time of any resultant call-up / contract). All requests for access to the network must be approved by Canada. The Offeror / Supplier must not modify user access or security settings without prior written authorization from the Client Department's network administrators.

Appendix 1 to Annex A

1.0 Description of Blended Learning and eLearning

1.1 Blended Learning and eLearning

1.1.1 Blended Learning usually combines traditional classroom based learning with more modern technology enabled methods and may include various types of eLearning products.

1.2 eLearning Products

1.2.1 Canada focuses on the broadest view of eLearning products that includes stand-alone, self-directed eLearning products to integrated, blended and hybrid approaches that combine a variety of delivery methods, tools, learning events and learning models, including:

i. CBT (not Web based, files reside on PC or CD-ROM);
ii. Self-directed Web Based CBT (Running through web-browser, files reside on PC or CD-ROM);
iii. Self-directed Web-based Training (Browser-based, files reside on server, runs over Internet and/or Intranet);
iv. Synchronous / Virtual Classroom / Webinar. Design and development aspect, but not delivery aspect;
v. Asynchronous online discussions/learning. Design and development aspect, but not delivery aspect;
vi. Hybrid (face to face classroom and online training). Design and development aspect, but not the delivery aspect;
vii. Electronic Performance Support (EPS);
viii. Online Communities of Practice;
ix. Blogs, wikis;
x. Podcasts, webcasts;
xi. E-Library (online interactive manuals, references, etc);
xii. Serious gaming products;
xiii. Synthetic environments (2D and/or 3D);
xiv. Simulations;
xv. Multi-Media portions of traditional classroom-based courses; and
xvi. M-leanring (mobile learning).

1.3 Learning Product Characteristics

1.3.1 Learning products have the following characteristics:

a. Interactive (learner to learner, learner to instructor, learner to mentor, learner to coach, learner to information database);
b. Based on formal instructional design incorporating research-based learning models or products to support learning such as job aides and knowledge repositories depending on requirements. Incorporating a variety of instructional approaches, including examples, problems, presentation and demonstration, practice and feedback, scenarios, case studies, role-play, simulation, assessment etc;
c. Integrated within a strategic learning and/or eLearning framework;
d. ELearning may be developed to SCORM specifications depending on requirements; and

1.4 ELearning Product Delivery Methods

1.4.1 ELearning solutions may be provided to Canada via the following channels:

a. Intranet, Internet, and/or CD-ROM;
b. Government owned or contracted legacy LMS/LCMS;
c. an asynchronous/synchronous tool; or as a
d. stand-alone product.

1.5 Multi-Media Integration

1.5.1 ELearning products will require integration of a variety of Multi-Media/interactive elements depending on requirements, which may include one or more of the following:

a. Text, graphics, video, sound,
b. Pop-up boxes and roll-overs,
c. Navigation features (forward, back, return to main menu, exit, book-marking),
d. Changing content organization depending on results of pre-assessment tests,
e. Drag-and-drop exercises,
f. Multiple choice and true/false questions,
g. Feedback on questions linked to area in courseware with the answer,
h. Exploratory functions - hot areas on screen,
i. Text entry for simple word recall, longer answer responses, or gather user information such as passwords,
j. Sliders - to allow user to select a choice or range of choices on a linear scale,
k. Timers - indicate passing time as user completes an exercise,
l. Simple simulations such as demonstrating sequence of keystrokes to perform basic commands in a software application,
m. Basic animations,
n. Testing, scoring, course management (tracking and reporting), and
o. Operational support (help, search (full-text and keyword based on metadata), glossary, dialogue boxes).

Delivery Platform Independence

1.6.1 ELearning products must be able to be delivered through multiple mechanisms (e.g. CBT, WBT). The solution must allow the ability to choose delivery mechanisms.

1.7 Dynamic Content and Flexible Architecture

1.7.1 Unless stated otherwise in any resultant call-up / contract,

a. ELearning solutions must accommodate dynamic content. The solutions must permit changes to the underlying information (text and graphics/illustrations) while minimizing changes to the product.

b. ELearning solutions must accommodate changes to the overall architecture (beyond the information itself) in that new modules or components will need to be added and existing modules or components changed or discarded.

1.8 Easy to Navigate and Maintain Information Structures

1.8.1 Information structures must be easily and intuitively navigable by novice users. The information and navigation structures must be easy to maintain.

1.9 Media and Delivery Mechanisms

1.9.1 The internet/intranet using browser technology will be used as the delivery environment. The product must support the applicable browser(s) as stated in the resulting call-up / contract. Unless stated otherwise in any resultant call-up / contract, plug-ins will not be permitted.

1.10 Reusability

1.10.1 The Offeror / Supplier must design with re-usability in mind. Content must be designed as reusable information objects that can be used as modular building blocks for larger learning structures such as lessons (Reusable Learning Objects). The use of metadata tags to describe information and learning objects facilitate rapid updating, searching, and management of content.

1.11 Performance Tracking and Assessment

1.11.1 The approach and extent of performance data collected will be a function of eLearning product requirements and the IM/IT infrastructure.

1.11.2 Performance Tracking and Assessment functionality may be required to conform to SCORM as identified in any resultant call-up / contract. Use of API calls falling under SCORM conformance must only be used if required by the client.

1.11.3 Performance Tracking and Assessment functionality may include any or all of the following:

a. Performance assessment in a learning context;
b. Basic student survey technique, collecting subjective data;
c. Advanced forms of data collection including the use of a database;
d. Collection of objective data, such as completion rates and times; and
e. Ability to track the student’s progress, to help them keep track of test scores and evaluations.

1.12 Searching

1.12.1 The approach and extent of eLearning product search functionality will be a function of the eLearning product requirements and the IM/IT infrastructure.

1.12.2 Searching capabilities can range from full-text searching within a product or directory, to field-based searching using metadata at the module, topic, sub-topic and keyword levels.

Appendix 2 to Annex A

ACRONYMS

ADDE	- Analysis Design Development Evaluation
ADL	- Advanced Distributed Learning
ADM	- Assistant Deputy Minister
AICC	- Aviation Industry CBT Committee
API	- Application Programming Interface
CBT	- Computer-based training
CF	- Canadian Forces
CFITES	- Canadian Forces Individual Training and Education System
CLF	- Common Look and Feel
DLN	- Defence Learning Network
DND	- Department of National Defence
EPS	- Electronic Performance Support
FoB	- Freight on Board
GoC	- Government of Canada
GPNet	- General Purpose Network
HPI	- Human Performance Improvement
HPT	- Human Performance Technology
HR	- Human Resources
IAW	- In Accordance With
IM	- Information Management
IMS	- Instructional Management System
IP	- Intellectual Property
IT	- Information Technology
LCC	- Learning and Career Centers
LCMS	- Learning Content Management System
LMS	- Learning Management System
MA	- Managing Authority
NCR	- National Capital Region
O/S	- Operating System
PC	- Personal Computer
PMI	- Project Management Institute
PMO	- Project Management Office
PMP	- Project Management Professional
PoC	- Proof of Concept
PS	- Public Service
QA	- Quality Assurance
RFSO	- Request for Standing Offer
ROI	- Return on Investment
SCO	- Shareable Content Object
SCORM	- Shareable Content Object Reference Model
SOW	- Statement of Work
WBT	- Web-based training
WCAG	- Web Content Accessibility Guidelines

ANNEX "B"
BASIS OF PAYMENT (FOR THE STANDING OFFER)

The Contractor will be paid firm, all inclusive daily rates as follows, for Work performed pursuant to a Contract, customs duty included, Goods and Services Tax (GST) or Harmonized Sales Tax (HST) extra, if applicable.

(The appropriate Stream(s), National Zone, Region(s) and Metropolitan Area(s) will be inserted at Standing Offer issuance)

Stream 1 - Strategic Learning Advisory Services

CATEGORY	12 - month period
Strategic Learning Advisor	
Senior	$
Intermediate	$
Junior	$

Stream 2 - Instructional Design and Development

CATEGORY	12 - month period
Instructional Designer	
Senior	$
Intermediate	$
Junior	$
Subject Matter Expert	
Senior	$
Intermediate	$
Junior	$
Technical Writer	
Senior	
Intermediate	
Junior	

Stream 3 - Custom eLearning Product Programming

CATEGORY	12 - month period
Custom eLearning Product Programmer	
Senior	$
Intermediate	$
Junior	$

Stream 4 - Rapid eLearning Product Programming

CATEGORY	12 - month period

Rapid eLearning Product Programmer	
Senior	$
Intermediate	$
Junior	$

Stream 5 - Quality Assurance

CATEGORY	12 - month period
Quality Assurance	
QA Specialist	$
Tester	
Senior	$
Junior	$

Stream 6 - Multi-Media Design & Development

CATEGORY	12 - month period
Multimedia	
Senior	$
Intermediate	$
Junior	$
Photographer	$
Animator	
Senior	$
Intermediate	$
Junior	$
Video Producer	$
Audio Producer	$
Multimedia Director	$
Narrator	$

Stream 7 - Project Management

CATEGORY	12 - month period
Project Manager	
Senior	$
Intermediate	$
Junior	$

Stream 8 - Training Delivery

CATEGORY	12 - month period
Instructor	
Senior	$
Intermediate	$

Junior	$
Training Facilitator	
Senior	$
Intermediate	$
Junior	$

Work Day: A work day is defined as 7.5 hours of work, exclusive of meal breaks. Payment will be made for days actually worked, with no provision for annual leave, statutory holidays and sick leave. If time worked is more or less than a day, the daily rate shall be prorated to reflect the actual time worked.

Travel and Living Expenses

1. For Work to be performed at the work location within a Region (not including sub-regions)

   (a) Canada will not accept any travel and living expenses incurred by the Contractor in the performance of the Work, for:

      (i) services provided within 100 km of the work location; and
      (ii) any travel between the Contractor's place of business and the work location.

   (b) For Services provided outside 100 km of the work location, the Contractor will be reimbursed for the authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for overhead or profit, in accordance with the meal, private vehicle and incidental expense allowances specified in Appendices B, C and D of the Treasury Board Travel Directive (http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/TBM_113/menu-travel-voyage_e.asp), and with the other provisions of the directive referring to "travellers", rather than those referring to "employees".

   (c) Canada will not accept any travel and living expenses incurred by the Contractor as a consequence of any relocation of personnel required to satisfy the terms of this Contract.

   (d) All travel must have the prior authorization of the Technical Authority. All payments are subject to government audit.

2. For Work to be performed at a work location within a sub-region (not including the Regions)

   (a) Canada will not accept any travel and living expenses incurred by the Contractor in the performance of the Work, for:

      (i) services provided within the sub-region; and
      (ii) any travel between the Contractor's place of business and the work location.

   (b) For services to be provided outside of the sub-region, the Contractor will be paid its authorized travel and living expenses, reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or 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 http://www.tbs-sct.gc.ca/hr-rh/gtla-vgcl/index_e.asp, and with the other provisions of the directive referring to "travellers", rather than those referring to "employees".

(c) Canada will not accept any travel and living expenses incurred by the Contractor as a consequence of any relocation of personnel required to satisfy the terms of this Contract.

(d) All travel must have the prior authorization of the Technical Authority. All payments are subject to government audit.

3. For Work to be performed at a work location within the National Zone

(a) Canada will not accept any travel and living expenses incurred by the Contractor in the performance of the Work, for:

(i) services provided within 100 km of the Contractor's facilities.

(b) For Services provided outside 100 km of the Contractor's facilities, the Contractor will be paid its authorized travel and living expenses, reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or 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 http://www.tbs-sct.gc.ca/hr-rh/gtla-vgcl/index_e.asp, and with the other provisions of the directive referring to "travellers", rather than those referring to "employees".

(c) Canada will not accept any travel and living expenses incurred by the Contractor as a consequence of any relocation required to satisfy the terms of the Contract.

(d) All travel must have the prior authorization of the Technical Authority. All payments are subject to government audit.

Travel Time

(a) Travel Status Time will be limited to 50% of the hourly rate calculated by dividing the proposed firm all inclusive per diem divided by 7.5.

(b) Time spent by a contracted individual traveling to and from specific pre-authorized work assignments (not commuting) that are more than 100 kilometers from the individual's work location may be billed at 50% of the firm all inclusive per diem rate. Time for travel which is more or less than a day shall be prorated to reflect actual time for travel in accordance with the following formula:

$$\frac{\text{Hours of travel X 50\% of firm all-inclusive per diem rate}}{\text{7.5 hours}}$$

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ANNEX “C”

EVALUATION OF FINANCIAL OFFER

(a) Offerors must submit a Financial Offer in response to this RFSO for the Streams for which they are bidding.

(b) With the possibility of new Offerors and new rates, existing Offerors may no longer be considered “Active” based on the evaluation methodology. In accordance with the financial evaluation defined below, existing SO Holders must submit per diem rates in response to this refresh using the Data Collection Component in the Centralized Professional Services System.

1. Provision of firm all inclusive per diem rates

The Offeror must provide firm per diem rate for all Levels of Expertise (i.e. Junior, Intermediate, Senior) for each Resource Category for each Stream in each Region and sub-region the Offeror is submitting an Offer.

The firm all inclusive per diem rates are to be, in Canadian dollars, GST or HST extra, as applicable.

(a) For Canadian-based Offerors, firm all inclusive per diem rates must be with Canadian customs duties and excise taxes as applicable included.

(b) For foreign-based Offerors, firm all inclusive per diem rates must include Canadian customs duties and excise taxes, as applicable.

2. Conduct of Financial Evaluation

PWGSC will conduct the financial evaluation based on the methodology detailed below using the firm all inclusive per diem rates proposed by the Offeror .

(a) For the technically responsive Offerors, the financial offers submitted in response to this solicitation will be assessed independently.

(b) The following steps will be taken for each Stream in each Region and sub-region:

- Definition of Original Median - the median calculated from all technically responsive offers submitted in the RFSO
- Definition of Adjusted Median - the median calculated by removing all offers greater than 40% and all offers lower than minus 40% of the Original Median.

Step 1 Each Offeror will have a “total evaluated cost” calculated for every Stream in each Region and sub-region it submitted an Offer. The total evaluated cost will be determined in accordance with the Financial Offer template in Annex “D”.

Step 2 An “Original Median” will be calculated for every Stream using the Total Evaluated Cost calculated in Step 1. A median is the middle offer in a set of offers whereby half the offers are greater and half are lower. For example in the set {100, 150, 200, 400, 900}, the median is 200.

Step 3 Any Offeror proposing a total evaluated cost that falls below the “Original Median” minus 80% for a specific Stream will be considered not financially compliant and will be considered “Inactive” and will receive no further consideration for that Stream. The Offeror will not be available to Identified

User for any new requirements raised under the SO for that specific Stream for the SO period.

Step 4 (i) Each of the remaining offers that have a 'total evaluated cost' that falls outside the "Original Median" band of plus or minus 40% for a stream will be removed from the total evaluated cost population.

(ii) The "Adjusted Median" will be based on those offers with a total evaluated costs falling within the "Original Median" band of plus or minus 40% for the Stream.

Step 5 (i) Any Offeror proposing a total evaluated cost greater than the "Adjusted Median" band of plus 40% or minus 40% will be considered not financially compliant and will be considered "Inactive" and will receive no further consideration for that Stream. The Offeror will not be available to Identified User for any new requirements raised under the SO for that specific Stream for the SO period.

(ii) Any Offeror proposing a total evaluated cost that is less than or equal to the "Adjusted Median" band of plus 40% or minus 40% will be considered compliant for that specific Stream. The Offeror will be authorized for use by Identified Users for those Consultant Categories and Levels of Expertise within that specific Stream for the SO period.

Appendice to Annex “C”
Example of a financial evaluation

Step 1:

The Total Evaluated Cost for an Offeror will be determined in accordance with the Financial Offer section within the Data Collection Component of the Centralized Professional Services System.

Step 2:

	Offeror A	**Offeror B**	**Offeror C**	**Offeror D**	**Offeror E**
Stream 1 - Total Evaluated Cost	$1,799.00	$3,000.00	$599.00	$4,800.00	$3,750.00
Original Median for Stream 1 - Instructional Design and Development, and Content Subject Matter Experts	$599, $1,799, $3,000, $3,750, $4,800 Original Median = $3,000				

Step 3:

	Offeror A	**Offeror B**	**Offeror C**	**Offeror D**	**Offeror E**
Stream 1 - Total Evaluated Cost	$1,799.00	$3,000.00	$599.00	$4,800.00	$3,750.00
Stream 1 - Total Evaluated Costs below Original Median minus 80% ($3,000-$2,400 = $600) Non Compliant	Compliant	Compliant	Not Financially Compliant	Compliant	Compliant
Offeror C is not financially compliant for Stream 1 and will receive no further consideration for Stream 1 - Instructional Design and Development, and Content Subject Matter Experts.					

Step 4:

	Offeror A	**Offeror B**	**Offeror C**	**Offeror D**	**Offeror E**
Stream 1 - Total Evaluated Cost	$1,799.00	$3,000.00	N/C	$4,800.00	$3,750.00
Total Evaluated Costs that fall outside the Original Median plus or minus 40%($3,000-$1,200 = $1,800) ($3,000+ $1,200 = $4,200) will be removed from the total evaluated cost	falls outside the original median - 40% therefore will be removed from population	Compliant	Not Financially Compliant	falls outside the original median + 40% therefore will be removed from population	Compliant

population to calculate adjusted median					
Adjusted Median	$3,000, $3,750 = $3,375				
Offeror A & D's total evaluated costs are removed from population.					

Step 5:

	Offeror A	**Offeror B**	**Offeror D**	**Offeror E**
Stream 1 - Total Evaluated Cost	$1,799.00	$3,000.00	$4,800.00	$3,750.00
Total Evaluated Costs that are greater than the Adjusted Median plus 40% ($3,375+ $1,350 = $4,725) and that are less than the Adjusted Median minus 40% ($3,375 - $1,350 = $2,025) will be deemed not responsive.	Less than Adjusted Median -40%, therefore not financially compliant	Compliant	greater than Adjusted Median + 40% therefore not financially compliant.	Compliant
Offeror A & D is not financially compliant for Stream 1 and will receive no further consideration. Offerors B & E are responsive for Stream 1 - Instructional Design and Development, and Content Subject Matter Experts				

ANNEX “D”
EVALUATION CRITERIA

1. Technical Evaluation

1.1 Mandatory Technical Evaluation Criteria

1.1.1 The Technical Offer / Arrangement must meet the mandatory technical evaluation criteria specified in table 1.1.3 below. The Offeror/Supplier must provide the necessary documentation to support compliance.

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

Table 1.1.3

	Description of Criteria	**Bid Preparation Instructions**
M.1	**Minimum years in business:** The Supplier must have been in business for a minimum of three (3) years as of the date of the arrangement submission. In case of a joint venture, at least one (1) member of the joint venture must meet the minimum three-year requirement.	The following information **must**, as a minimum, be provided: (i) Legal documents (e.g. Incorporation certificate, business registration or tax returns) confirming the number of years the firm has been in business. (ii) If the Supplier legal entity has been incorporated or otherwise created less than 3 years before bid closing as the result of a corporate change under which it has, in law, assumed all of the assets, undertaking, operational capability, skills and resources of other legal entities, then Canada will consider the 3 year minimum requirement to be met if the Supplier legal entity demonstrates to Canada’s satisfaction that: a) the Supplier legal entity has been incorporated or otherwise created as the result of a corporate change under which it has in law assumed all of the assets, undertaking, operational capability, skills and resources of other legal entities; b) each of the other legal entities carried on business, uninterrupted and in the normal course, for at least 3 years before the corporate change; c) the Supplier legal entity has carried on the business of all of the other legal entities in the normal course, uninterrupted from and after the date of the corporate change; d) the corporate change was solely for tax or other purposes unrelated to the business

			of the other legal entities and does not affect the ability of the Supplier legal entity to carry on the business that had been carried on by the other legal entities; and e) the Supplier legal entity, as of the date of bid closing, maintains the same assets, undertaking, operational capability, skills and resources as the other legal entities had maintained before the corporate change. f) In these circumstances, Canada may require from the Supplier an unqualified legal opinion from an independent law firm stating that the supplier legal entity meets all of the above requirements. Canada reserves the right to require other detail and material to verify that the above requirements are met. If Canada is not satisfied that the above requirements have been met, the Supplier legal entity's arrangement will be considered non-compliant. Canada reserves the right to request proof of any information provided by the Supplier. If the information cannot be validated, the Supplier's arrangement will be considered non-compliant.
M.2	**Streams of Service** For the stream(s) that the Supplier wants to provide services under, the Supplier must provide the following:		
M.2(a)	**Stream 1 – Strategic Learning Advisory Services**		
	The Supplier must have billed a total cumulative dollar value of $**150,000** (GST/HST excluded) in Strategic Advisory Services for Training similar in nature to those described in Annex "A" Requirements to Outside Clients** within the last five (5) years (as of bid posting). The following information **must**, as a minimum, be provided: a.Name of the Joint-venture member for the referenced project (if applicable); b.Name of Client Organization; c.Brief description of the Scope and Objective of the project to clearly show relevancy of the project; d.Start and End dates of the project (from-to dates in month/year). If the project was completed in the month/year that the RFSA is closing, provide day/month/year to		The following information **should,** as a minimum, be provided for each of the projects cited: a.Name of the client reference; and b.Telephone number, fax number, and e-mail address of the client reference.

	demonstrate that the project is completed at the date of your bid or the bid closing date whichever comes first; and e.Project value – total amount invoiced in Instructional Design and Development costs for the project.	
M.2(b)	**Stream 2 - Instructional Design and Development Services**	
1)	The Supplier must have billed a total cumulative dollar value of **$300,000** (GST/HST excluded) in Instructional Design and Development Services of traditional learning and/or eLearning Products similar in nature to those described in Annex "A" Requirements to Outside Clients** within the last five (5) years (as of bid posting). The following information **must**, as a minimum, be provided: 1 Name of the Joint-venture member for the referenced project (if applicable); 2 Name of Client Organization; 3 Brief description of the Scope and Objective of the project to clearly show relevancy of the project; 4 Start and End dates of the project (from-to dates in month/year). If the project was completed in the month/year that the RFSA is closing, provide day/month/year to demonstrate that the project is completed at the date of your bidor the bid closing date whichever comes first; and 5 Project value – total amount invoiced in Instructional Design and Development costs for the project.	The following information **should,** as a minimum, be provided for each of the projects cited: a.Name of the client reference; Telephone number, fax number, and e-mail address of the client reference.
2)	The Supplier must have billed a total cumulative dollar value of $**100,000** (GST/HST excluded) in Technical Writing services similar in nature to those described in Annex "A" Requirements to Outside Clients** within the last five (5) years (as of bid posting). The following information **must**, as a minimum, be provided: 1 Name of the Joint-venture member for the referenced project (if applicable); 2 Name of Client Organization; 3 Brief description of the Scope and Objective of the project to clearly show relevancy of the project;	The following information **should,** as a minimum, be provided for each of the projects cited: a.Name of the client reference; Telephone number, fax number, and e-mail address of the client reference.

	4 Start and End dates of the project (from-to dates in month/year). If the project was completed in the month/year that the RFSA is closing, provide day/month/year to demonstrate that the project is completed at the date of your bidor the bid closing date whichever comes first; and 5 Project value – total amount invoiced in Instructional Design and Development costs for the project.	
M.2(c)	**Stream 3 – Custom Elearning Product Programming**	
	The Supplier must have billed a total cumulative value of **$300,000** (GST/HST excluded) in Elearning Product Programming Services similar in nature to those described in Annex "A" Requirements to Outside Clients** within the last five (5) years (as of bid posting). The following information **must**, as a minimum, be provided: a.Name of the Joint-venture member for the referenced project (if applicable); b.Name of Client Organization; c.Brief description of the Scope and Objective of the project to clearly show relevancy of the project; d.Start and End dates of the project (from-to dates in month/year). If the project was completed in the month/year that the RFSA is closing, provide day/month/year to demonstrate that the project is completed at the date of your bidor the bid closing date whichever comes first; and e.Project value – total amount invoiced in Elearning Product Programming costs for the project.	The following information **should,** as a minimum, be provided for each of the projects cited: a.Name of the client reference; and b.Telephone number, fax number, and e-mail address of the client reference.
M.2(d)	**Stream 4 – Rapid eLearning Product Programming**	
	The Supplier must have billed a total cumulative value of **$150,000** (GST/HST excluded) in Rapid eLearning Product Programming Services similar in nature to those described in Annex "A" Requirements to Outside Clients** within the last five (5) years (as of bid posting). The following information **must**, as a minimum, be provided: 0Name of the Joint-venture member for the referenced project (if applicable);	The following information **should,** as a minimum, be provided for each of the projects cited: a.Name of the client reference; and b.Telephone number, fax number, and e-mail address of the client reference.

	1Name of Client Organization; 2Brief description of the Scope and Objective of the project to clearly show relevancy of the project; 3Start and End dates of the project (from-to dates in month/year). If the project was completed in the month/year that the RFSA is closing, provide day/month/year to demonstrate that the project is completed at the date of your bid or the bid closing date whichever comes first; and 4Project value – total amount invoiced in eLearning Product Programming costs for the project.	
M.2(e)	**Stream 5 – Quality Assurance**	
	The Supplier must have billed a total cumulative value of **$50,000** (GST/HST excluded) in Quality Assurance Services on eLearning Product(s) similar in nature to those described in Annex "A" to Outside Clients** within the last five (5) years (as of bid posting). The following information **must**, as a minimum, be provided: a. Name of the Joint-venture member for the referenced project (if applicable); b. Name of Client Organization; c. Brief description of the Scope and Objective of the project to clearly show relevancy of the project; d. Start and End dates of the project (from-to dates in month/year). If the project was completed in the month/year that the RFSA is closing, provide day/month/year to demonstrate that the project is completed at the date of your bid or the bid closing date whichever comes first; and e. Project value – total amount invoiced in Quality Assurance on eLearning Product(s) costs for the project.	The following information **should,** as a minimum, be provided for each of the projects cited: a. Name of the client reference; and b. Telephone number, fax number, and e-mail address of the client reference.
M.2(f)	**Stream 6 - Multi-Media Design and Development**	
1)	The Supplier must have billed a total cumulative value of $300,000 (GST/HST excluded) in Multi-Media Design and Development Services for traditional learning and/or eLearning Products similar in nature to those described in Annex "A" to Outside Clients** within the last five (5) years (as of bid posting).	The following information **should,** as a minimum, be provided for each of the projects cited: a.Name of the client reference; b.Telephone number, fax number, and e-mail address of the client reference.

	The following information **must**, as a minimum, be provided: a.Name of the Joint-venture member for the referenced project (if applicable); b.Name of Client Organization; c.Brief description of the Scope and Objective of the project to clearly show relevancy of the project; d.Start and End dates of the project (from-to dates in month/year). If the project was completed in the month/year that the RFSA is closing, provide day/month/year to demonstrate that the project is completed at the date of your bidor the bid closing date whichever comes first; and e.Project value – total amount invoiced in Multi-media Design and Development Services costs for the project.	
M.2(g)	**Stream 7 - Project Management**	
1)	The Supplier must have billed a total cumulative value of $150,000 (GST/HST excluded) in Project Management Services for traditional learning and/or eLearning Products similar in nature to those described in Annex “A” Requirement to Outside Clients within the last five (5) years (as of bid posting). The following information **must**, as a minimum, be provided: a.Name of the Joint-venture member for the referenced project (if applicable); b.Name of Client Organization; c.Brief description of the Scope and Objective of the project to clearly show relevancy of the project; d.Start and End dates of the project (from-to dates in month/year). If the project was completed in the month/year that the RFSA is closing, provide day/month/year to demonstrate that the project is completed at the date of your bidor the bid closing date whichever comes first; and e.Project value – total amount invoiced in Project Management Services costs for the project.	The following information **should,** as a minimum, be provided for each of the projects cited: a.Name of the client reference; and b.Telephone number, fax number, and e-mail address of the client reference.
M.2(h)	**Stream 8 – Training Delivery**	
	The Supplier must have billed a total cumulative value of $150,000 (GST/HST excluded) in providing Instructors, and/or Training Facilitators similar in nature to those described in Annex “A” Requirements	The following information **should,** as a minimum, be provided for each of the projects cited: a.Name of the client reference; and

	to Outside Clients** within the last five (5) years (as of bid posting). The following information **must**, as a minimum, be provided: a.Name of the Joint-venture member for the referenced project (if applicable); b.Name of Client Organization; c.Brief description of the Scope and Objective of the project to clearly show relevancy of the project; d.Start and End dates of the project (from-to dates in month/year). If the project was completed in the month/year that the RFSA is closing, provide day/month/year to demonstrate that the project is completed at the date of your bid or the bid closing date whichever comes first; and e.Project value – total amount invoiced in Instructing and/or Training Facilitation costs for the project.	b.Telephone number, fax number, and e-mail address of the client reference.

** Outside Client refers to a client that is external to the Offeror's / Supplier's own organization. Parent companies, affiliates, and subsidiaries are considered internal.

ANNEX "E"
PROPOSED REGIONS

Region(s)/Sub-Region(s) for which the Offeror has provided per diem rates. Check all that apply.		
National Zone		To be used when the Client has no preference in terms of where the work is performed.
Atlantic Region		Includes Newfoundland, Nova Scotia, New Brunswick, and Prince Edward Island
Halifax Sub-Region		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.
Moncton Sub-Region		Bounded on the west by the a north-south line running from Carleton to Saint John, on the north by the Northumberland Strait , on the east and the south by the Nova Scotia border.
Quebec Region		The province of Quebec with the exception of the National Capital Region.
Quebec City Sub-Region		Bounded on the west by a north-south line running from Lac-Jacques-Cartier to Trois-Rivières, as far north as Baie-St-Paul on th North shore and St-Jean-Port-Joli on the South Shore, on the east by a north-south line running from St-Jean-Port-Joli to St-Georges, on the south by a west-east line running from St-Georges to Trois-Rivières.
Montréal Sub-Region		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 b Drummondville, to Bromont, on the south by the USA border.
Ontario Region		The province of Ontario with the exception of the National Capital Region.
Toronto Sub-Region		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 the Lake Ontario.
National Capital Sub-Region		Bounded on the west by a north-south line running from Petawawa to Kingston, as far north as Maniwaki, Quebec, on the east by the Ontario-Quebec border on the south by the St. Lawrence River (include Gatineau-Maniwaki and Masson-Angers areas).
Western Region		Includes Manitoba, Saskatchewan, Alberta, and Northwest Territories
Winnipeg Sub-Region		Bounded on the west by a north-south line running from Portage la Prairie to Morris, on the north by a west-east line running from Morris to Reynolds, on the east by a north-south line from Reynolds to Netley, or the south by a east-west line from Netley to Portage la Prairie.
Saskatoon Sub-Region		Bounded on the west by a north-south line running from North Battlefor to Biggar, on the north by a west-east line running from North Battlefor to Prince Albert, on the east by a north-south line from Prince Albert to Kenaston, on the south by a east-west line from Kenaston to Biggar.

Calgary Sub-Region		Bounded on the west by a north-south line running from Canmore to High River, on the north by a west-east line running from Canmore to Olds, on the east by north-south line from Strathmore to Olds, on the south by a east-west line from Strathmore to High River.
Edmonton Sub-Region		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.
Pacific Region		Includes British Columbia and Yukon Territory
Vancouver Sub-Region		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 Abbostsford.
Victoria Sub-Region		Bounded on the west, south and north by the Strait of Georgia, on the east by a north-south line from Nanaimo to Sooke.

ANNEX "F"
INSURANCE REQUIREMENTS

1. The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than $2,000,000 per accident or occurrence and in the annual aggregate.

2. The Commercial General Liability Insurance policy must include the following:

   (a) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.

   (b) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.

   (c) Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.

   (d) Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.

   (e) Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.

   (f) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.

   (g) Employees and, if applicable, Volunteers must be included as Additional Insured.

   (h) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)

   (i) Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.

   (j) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.

   (k) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.

   (l) Non-owned Automobile Liability - Coverage for suits against the Contractor resulting from the use of hired or non-owned vehicles.

ANNEX “G”
LIMITATION OF LIABILITY

Limitation of Liability - Information Management/Information Technology
(will only apply to call-ups included under Stream 2 - eLearning Product Programming and Quality Assurance)

1. This section applies despite any other provision of the Contract and replaces the section of the general conditions entitled "Liability". Any reference in this article to damages caused by the Contractor also includes damages caused by its employees, as well as its subcontractors, agents, and representatives, and any of their employees.

2. First Party Liability of the Contractor to Canada:

   (a) Whether the claim is based in contract, tort, or another cause of action, the Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor´s performance or failure to perform the Contract that relate to:

      (i) any infringement of intellectual property rights;

      (ii) any breach of confidentiality;

      (iii) any breach of warranty obligations; and

      (iv) physical injury, including death.

   (b) The Contractor is liable for all direct damages affecting real or personal property owned, possessed, or occupied by Canada.

   (c) The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment.

   (d) The Contractor is also liable, up to <u>0.75 times of the contract value or $1 million - whichever is greater</u>, for any other direct damages to Canada in any way relating to the Contract, including all the costs to Canada associated with reprocuring the Work from another party if the Contract is terminated for default. These costs include any increase in the price payable for the Work.

   (e) If Canada´s records or data are harmed as a result of the performance of or failure to perform the Work, the Contractor’s only liability is, at the Contractor´s own expense, to restore Canada´s records and data using the most recent back-up kept by Canada.

3. Third Party Claims: Each Party agrees that it is fully liable for any damages that it causes to any third party in connection with the Contract, regardless of whether the third party makes its claim against Canada or the Contractor. If Canada is required, as a result of joint and several liability, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada for that amount. However, the Contractor is not liable for reimbursing Canada for any special, indirect or consequential damages that Canada is required by a court to pay to a third party as a result of joint and several liability.