

REQUEST FOR INFORMATION

INTRODUCTION

The Canada Revenue Agency (CRA) requires qualified instructors to develop, present and deliver advance level courses in both Official Languages to CRA senior employees dealing with Canadian tax laws at the highest complexity level. Editorial services of established course materials may be required following reviews, updates and development of new course materials as and when required.

The CRA's mandate is to promote compliance with Canada's tax legislation and regulations through education, quality service, and responsible enforcement.

The Continuous Professional Education Program (CPEP) is a curriculum of courses designed to increase the knowledge and analytical skills of senior employees in positions requiring a high level of Canadian tax law knowledge in specialized areas. The development of these skills enables the employees to stay current within this changing and complex environment.

The CRA is responsible for providing its employees with training in the following CPEP course subjects in both Official Languages:

1. FAPI and Foreign Affiliate Rules
2. Advanced Corporate Reorganizations
3. Statutory Interpretation
4. Tax Treaties
5. Debt Financing
6. Advanced Partnerships
7. Trusts
8. Capital Markets
9. Advanced Derivatives Structuring
10. Accounting for Derivatives

The draft Statement of Work (SOW) provides more details as to what is expected in the requirements for which CRA may issue a Request for Proposal (RFP) in the future.

Suppliers are invited to provide a written submission in response to this Request for Information (RFI), draft SOW, and associated questions. Suppliers that provide written feedback may be invited to a Bidder's Conference with CRA representatives. This session would allow suppliers to provide additional feedback pertaining to this RFI through a question and answer platform.

HISTORICAL USAGE

A variety of the courses listed above are delivered on an annual basis by external service providers depending on the learning needs of CRA senior employees. The courses are generally offered in the larger centres across Canada averaging 30-70 participants per session. There can be upwards of 20 sessions delivered per year depending on the demand for technical training dealing with Canadian tax laws at the highest complexity level.

DISCLAIMER

This RFI is not to be construed as a solicitation for tenders or proposals. No contract or any other form of commitment will be entered into based on responses to this RFI. This RFI is not considered as authorization from the CRA to undertake any work that would result in costs to the CRA. Nothing in this RFI shall be construed as a commitment from the CRA to issue an RFP.

All responses will be held by the CRA on a confidential basis (subject to applicable federal legislation) and remain the property of the CRA once they have been received. The CRA may reproduce, photocopy or transcribe the responses and any non-proprietary supporting documentation for the purposes of its review and/or inclusion in any resulting RFP. The CRA may use non-proprietary information provided in its review and/or in the preparation of any formal RFP. Responding to this RFI is not a prerequisite to receiving or being eligible to bid on RFP's that may result for this requirement. RFP's will be advertised on the Government Electronic Tendering Service (GETS) at www.buyandsell.gc.ca.

The CRA shall not be bound by anything stated herein. The CRA reserves the right to change at any time, any or all parts of the requirement, as it deems necessary. The CRA also reserves the right to revise its procurement approach, as it considers appropriate, either based upon information submitted in response to this RFI or for any other reason it deems appropriate.

PURPOSE OF RFI

The purpose of this RFI is to:

1. Initiate an exchange of information with potential external service providers;
2. Provide potential external service providers with an early opportunity to assess and comment on the requirement in order to maximize best value to the CRA if an RFP is posted;
3. Determine the interest of suppliers to provide services described in the RFI and the draft SOW;
4. Receive feedback and recommendations on any issues that would impact a supplier's ability to fulfill the CRA requirement; and
5. Discover best practices within the industry that would increase the level of interest of providing this service to the CRA through a competitive bidding process.

QUESTIONS

Suppliers are invited to submit answers in response to the questions listed below. The draft SOW should be taken into consideration when responding to questions.

1. Based on the information provided in the RFI and the draft SOW, would you be interested in submitting a proposal to the CRA should an RFP be issued for this requirement? If not, which of the requirements outlined in the RFI and/or the draft SOW would you recommend changing, and why?
2. Do you see any major issues or concerns with the attached draft SOW? If yes, please explain.
3. Can you provide services nationally or regionally (Headquarters and regions: Atlantic, Quebec, Ontario, Prairie, and Pacific). Can you provide the services in both French and English?

4. Is there a preference on how the courses should be grouped to facilitate a competitive bidding process: by course, by region, by language, by group, or a combination of the above?
5. Would you be required to sub-contract to a third party to develop and deliver all or parts of a course, or do you have the expertise within your organization to meet all of the requirements of the draft SOW?
6. Please provide details on your past experience in providing training/seminars/combination with respect to technical training developed, presented and delivered dealing with Canadian tax laws at the highest complexity level:
 - a) What types of courses have you provided and do any relate to the topics listed above?
 - b) In what venues have you developed and delivered technical training, how large has your audiences been?
 - c) What is the general background of the participants who have attended your courses in the past (professional lawyers and accountants, internal/external auditors, representatives of international organizations, college and university students, etc)?
 - d) How many hours of instruction have you or your organization provided in the last five years in general, and in particular related to the topics listed above?
 - e) What is the general preparation time needed to develop and deliver courses similar to the ones listed above?
7. Please describe your pedagogical approach to technical training dealing with Canadian tax laws at the highest complexity level:
 - a) What materials do you use?
 - b) Do you provide pre-reading materials?
 - c) Do you incorporate case studies to reinforce certain concepts?
 - d) Do you have more than one lecturer per course to change the tone and create a more dynamic learning environment? What is your approach to e-learning and/or blended learning?
 - e) Do you offer e-tools as part of training?
 - f) Do you use and/or own webinar software?
8. How do you evaluate course effectiveness?
9. Please describe in general the credentials of your instructors, and indicate the availability of your instructor pool to develop and deliver technical training.
10. How do you evaluate instructor effectiveness?
11. How do you ensure that your instructors/trainers/presenters have the proper knowledge, skills, and experience required to deliver technical courses?
12. Do you have any concerns, or see any impediments with respect to the competitive bidding process through the formal RFP\Government Electronic Tendering Service (GETS) at www.buyandsell.gc.ca, in regard to technical training developed and delivered to CRA senior employees?
13. Please provide any additional information you consider to be relevant.

RESPONSE TO RFI

Suppliers are required to send responses to this RFI no later than February 27, 2015 to the following email address: Tanya.DiVirgilio@cra-arc.gc.ca