

## REQUEST FOR PROPOSALS

For

Pre-retirement seminars for Public Service Commission employees.

SOLICITATION DATE: March 4<sup>th</sup>, 2015

CLOSING DATE AND TIME: April 14, 2015, 2:00 P.M., EASTERN DAYLIGHT SAVING TIME

**Contracting Authority :**

Caroline Chao  
Public Service Commission  
Tel: 819-420-8380  
E-mail: [Caroline.Chao@cfp-psc.gc.ca](mailto:Caroline.Chao@cfp-psc.gc.ca)

(the Contracting Authority is responsible for all matters concerning the competitive process)

**Backup:**

Michelle Wong  
Public Service Commission  
Tel: 819-420-6462  
E-mail: [Michelle.Wong@cfp-psc.gc.ca](mailto:Michelle.Wong@cfp-psc.gc.ca)

**Proposal Submissions:**

Proposals must be sent to the Public Service Commission, at one of the following addresses:

**For delivery by courier services  
deliveries:**

Bid Receiving  
SOLICITATION NUMBER: CON14-1030  
Public Service Commission c/o SCI  
Procurement Services  
465 Industrial Ave.  
Ottawa, Ontario, K1G 0Z1  
Attn.: Caroline Chao or Michelle Wong

**For in-person drop-off :**

Bid Receiving  
SOLICITATION NUMBER: CON14-1030  
Public Service Commission  
Procurement Services  
22 Eddy Street, 12<sup>th</sup> Floor  
Gatineau, Québec, K1A 0M7  
Attn.: Caroline Chao or Michelle Wong

**IMPORTANT: (In-Person Drop-Off)**

Please call the contracting authority from the  
commissionaire's desk upon arrival.

**It is strongly recommended that the bidder contact the Contracting Authority or the backup and schedule an in-person drop-off. It is solely the bidder's responsibility to ensure that the proposal is received at the address above by the closing date and time.**

**Table of Contents**

**1. STANDARD INFORMATION, INSTRUCTIONS AND CONDITIONS**

- 1.1 Information
- 1.2 Instructions
- 1.3 Conditions

**2. SUBMISSION OF PROPOSALS**

**3. PRESENTATION OF PROPOSALS**

- 3.1 Technical Proposal
- 3.2 Financial Proposal

**4. ENQUIRIES DURING THE SOLICITATION PERIOD**

**5. REQUIREMENT**

- 5.1 Title
- 5.2 Objective
- 5.3 Background
- 5.4 Tasks / Scope
- 5.5 Constraints
- 5.6 Client Support
- 5.7 Deliverables
- 5.8 Travel
- 5.9 Security Requirements
- 5.10 Official Languages
- 5.11 Intellectual Property
- 5.12 Green Procurement and Services

**6. TASK AUTHORIZATION**

- 6.1 TA Form
- 6.2 TA Limit and Approval Authority
- 6.3 TA Request
- 6.3 TA Process

**7. PERIOD OF PROPOSED CONTRACT**

- 7.1 Option to extend Contract:

**8. EVALUATION CRITERIA AND SELECTION METHOD**

- 8.1 Mandatory Requirements
- 8.2 Rated Requirements
- 8.3 Contractor Selection Method

**9. ABORIGINAL SUPPLIER**

- 9.1 Self-Identification

**10. CERTIFICATION**

- 10.1 Certifications Precedent to Issuance of a Contract
  - 10.1.1 Federal Contractors Program for Employment Equity – Bid Certification
  - 10.1.2 Former Public Servants Certification
  - 10.1.3 Certification of Education and Experience
  - 10.1.4 Certification of Availability
  - 10.1.5 Conflict of Interest
  - 10.1.6 Language Certification
  - 10.1.7 Certificate of Independent Bid Determination

Attachment 1 to Request For Proposal (Table 1.0- Proposed resources per module)  
Attachment 2 to Request For Proposal (Task Authorization Forms)

**ANNEX A, GENERAL CONDITIONS**  
**ANNEX B, SUPPLEMENTARY CONDITIONS**  
**ANNEX C, TERMS OF PAYMENT**  
**ANNEX D, BASIS OF PAYMENT**  
**ANNEX E, SRCL**

**Proposal to the Public Service Commission  
Bidder Information and Authorization**

**Bidder Name and Address:**

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Legal Status (incorporated, registered, etc.):

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GST or HST Registration Number and/or Business Identification Number (Canada Revenue Agency):

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**Name and Title of Person authorized to sign on behalf of Bidder:**

Print Name:

Title:

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Signature:

Date:

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**Central Point of Contact**

The Bidder has designated the following individual as a central point of contact for all matters pertaining to the proposed contract, including the provision of all information that may be requested:

Name and Title:

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Tel:

Fax:

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E-mail:

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**Each proposal must include a copy of this page properly completed and signed. The Bidder's signature indicates acceptance of the terms and conditions set out herein.**

## **1. STANDARD INFORMATION, INSTRUCTIONS AND CONDITIONS TO THE BIDDER**

This is a request (hereafter referred to as a Request for Proposal, RFP or solicitation) that proposals be developed and submitted to the Public Service Commission (PSC) setting out the alternative means by which several technical, performance, time and other goals and objectives may be best met, having regard to stated mandatory requirements. The PSC will consider entering into a contract for the implementation of the most acceptable proposal, which will be determined by the evaluation of factors set out in this RFP. In addition, the proposal will be measured against the content terms and conditions set forth in this RFP.

### **1.1 Information:**

#### 1.1.1 Standard Information:

- a) The PSC reserves the right to choose the firm that best meets the requirements, without incurring any obligation to any other firms having responded to this solicitation. The proposal that is lowest in cost shall not necessarily be chosen.
- b) The PSC reserves the right to accept any proposal without negotiating with the bidder. It is the responsibility of the bidder to obtain all information on the project before bidding.
- c) No proposal jointly submitted by two or more candidates will be accepted. However, a proposal submitted by one candidate as project lead who subcontracts part of the work to another candidate will be accepted, provided that the potential sub-contractor withdraws from the competition by not submitting a proposal.

#### 1.1.2 Right To Negotiate or Cancel:

The PSC reserves the right to further negotiate with bidders in order to arrive at the most cost effective contract that is in keeping with the terms and conditions of the Request for Proposals or, alternatively, not to award a contract at all.

#### 1.1.3 Office of the Procurement Ombudsman

The Office of the Procurement Ombudsman (OPO) was established by the Government of Canada to provide an independent avenue for suppliers to raise complaints regarding the award of contracts under \$25,000 for goods and under \$100,000 for services. You have the option of raising issues or concerns regarding the solicitation, or the award resulting from it, with the OPO by contacting them by telephone at 1-866-734-5169 or by e-mail at [boa.opo@boa.opo.gc.ca](mailto:boa.opo@boa.opo.gc.ca). You can also obtain more information on the OPO services available to you at their website at [www.opo-boa.gc.ca](http://www.opo-boa.gc.ca).

### **1.2 Instructions:**

#### 1.2.1 Confidentiality:

All bidders submitting proposals shall maintain the confidentiality of all information, documents, and material, whether in oral, written, or machine readable form furnished by the PSC and shall not communicate such information, documents or materials to any third party without the prior consent of the PSC.

#### 1.2.2 Monitoring:

The contractor is to monitor the personnel assigned to any contract resulting from this RFP to ensure that the work progresses to the satisfaction of the Project Authority.

The contractor is also responsible for monitoring and verifying the days billed using periodic audits.

1.2.3 Standard Instructions:

- a) It is essential that items **8.1 and 8.2** in this solicitation be fully described in the proposal. Any failure to provide information shall work to the disadvantage of the bidder.
- b) The bidder's proposal must conform to the stipulated format indicated in section 3. "PRESENTATION OF PROPOSAL" and section 8. "EVALUATION CRITERIA AND SELECTION METHOD". If the bidders feel that certain items restrict them in some way, they must indicate this in their proposals. Any deviation from the conditions laid down in this document must be described in detail with supporting arguments.

**1.3 Conditions:**

1.3.1 Conditions to Bidders:

Bids submitted in response to this solicitation shall be valid in all respects for not less than ninety (90) calendar days from the closing date of this request.

1.3.2 General Conditions, Supplementary Conditions, Terms of Payment:

The attached Annex A, General Conditions, Annex B, Supplementary Conditions, Annex C, Terms of Payment, are hereby incorporated into and form part of this solicitation. Submission of a bid constitutes acknowledgement that the bidder has read and agrees to be bound by such instructions.

**2. SUBMISSION OF PROPOSALS**

Bidders must submit **4 copies** of the **technical proposal** and **2 copies** of the **financial proposal** to the Public Service Commission (see page 1 for complete address) no later than **April 14<sup>th</sup> 2015, 2:00 PM Eastern Daylight Saving Time**. It is the responsibility of the bidders to ensure that proposals are received at the required address before closing date and time. **Proposals will not be accepted after 2:00 PM Eastern Daylight Saving time and will be returned unopened to the sender.**

Proposals should be concise and should address, but not necessarily be limited to, the evaluation and selection criteria. Items not addressed will be given a score of zero. Bids will be evaluated solely on their content.

Due to the high risk of technical difficulties and unsecured equipment, electronic transmission of proposals by such means as electronic mail, facsimile, or commercial telex is not considered to be practical and therefore **will not be accepted.**

During the bid evaluation period, bidders may or may not be required to supply other information to support, validate or clarify the details included in bids. Information shall be made available to the PSC within five (5) working days of receipt of a request.

**3. PRESENTATION OF PROPOSALS**

The PSC requests that Bidders provide their Bid in separately bound sections and in separate envelopes as follows:

- Section I: Technical Bid including Certifications as a separate section (four (4) hard copies)
- Section II: Financial Bid (two (2) hard copies)

Prices must appear in the Financial Bid only. No prices must be indicated in any other section of the bid. Non-compliance with this condition (for that reason alone) may result in bid disqualification.

The PSC requests that Bidders follow the format instructions described below in the preparation of their bid.

- a) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- b) use a numbering system that corresponds to that of the Request for Proposals;
- c) Include the certifications as a separate section of the Technical Bid.

**3.1 Section I: Technical Proposal** (with no reference to price):

The Technical Proposal shall deal with the following aspects:

- a) Response to all mandatory requirements specified in this RFP other than for financial information;
- b) Response to all rated requirements;
- c) Copies of all signed certifications; and
- d) Any other non-financial information.

**3.2 Section II: Financial Proposal:**

Bidders must provide a firm and all-inclusive fee per seminar, inclusive of all expenses

The price quoted is to be exclusive of the Goods and Services Tax (GST) or the Harmonized Sales Tax (HST). **Please indicate taxes separately.**

**4. ENQUIRIES DURING THE SOLICITATION PERIOD**

All enquiries regarding the proposal solicitation must be submitted by e-mail to the **Contracting Authority** at the address given on page one (1) of this Solicitation, as early as possible within the bidding period. Enquiries must be received no less than four (4) calendar days prior to the bid closing date to allow sufficient time to provide a response. **Enquiries received after that time may not be answered.**

To ensure consistency and quality of information provided to bidders, the Contracting Authority will provide, simultaneously to all companies to which this solicitation has been sent, any information with respect to significant enquiries received and the replies to such enquiries without revealing the sources of the enquiries.

All enquiries and other communications with government officials throughout the solicitation period are to be directed **ONLY** to the **Contracting Authority** named on page one (1) of the solicitation. Non-compliance with this condition during the solicitation period may (for that reason alone) result in disqualification of bids.

**5. REQUIREMENT**

**5.1 Title:**

Pre-retirement seminars for Public Service Commission (PSC) employees.

**5.2 Objective:**

The PSC is seeking services to plan and deliver pre-retirement seminars in both official languages which will help employees plan for and make the transition from working life to an active and fulfilling retirement.

The content of these seminars will provide up to date and practical information and tools that will help participants understand, navigate and plan for the many aspects of retirement such as; provisions of the federal and other government Pension Plans; financial implications and considerations, estate planning; and physical and psychological health and well-being,

### 5.3 Background:

The PSC recognizes that a smooth transition from work life to retirement is not happenstance; it requires both knowledge and planning. Pre-retirement seminars are an indispensable means of providing employees with the information and tools they need to make important decisions that will allow them to transition into retirement with confidence and understanding.

### 5.4 Tasks / Scope:

The contractor shall provide a team of subject matter experts to prepare and deliver a series of 3-day pre-retirement seminars for up to 35 PSC employees per seminar, for a maximum of three (3) seminars in English and three (3) seminars in French. Each seminar shall include five (5) modules (Entitlements in Retirement, Estate Planning, Psychological and Sociological aspects of retirement, Physical Health and Well-being and Financial Planning).

The contractor shall:

- i. Meet with the Project Authority to confirm understanding of requirement;
- ii. Provide a detailed course description and instructional materials and present it to the Project Authority for approval;
- iii. Prepare and deliver a series of 3- day pre-retirement seminars to PSC employees. The seminars shall be delivered in either English or French, as determined by the project authority and shall provide up to date information on the following modules:

**Module 1: Entitlements in Retirement**

- Public Services Superannuation Act (PSSA) and provisions of the Federal Public Service Pension Plan
- Employee benefits and Severance Pay
- Provisions of other Government Plans

**Module 2: Estate Planning**

- Powers of Attorney
- Wills
- Tax considerations and implications

**Module 3: Psychological and Sociological aspects of retirement**

- Understanding and handling the transition from work to retirement
- Sociological aspects of retirement (activity, supports, networks, family)

**Module 4: Physical Health and Well-being**

- Phases and common ailments of aging
- Establishing and sustaining healthy habits

**Module 5: Financial Planning**

**Part 1 – Can you afford to retire?**

- Work income vs retirement income
- Personal savings considerations
- Public Service Superannuation Act (PSSA) and the Federal Public Service Pension Plan
- Canada / Québec Pension Plans (C/QPP)
- Old Age Security (OAS)
- Pension Portability, Buyback of Service

**Part 2 – Investments, taxes and insurance**

- Investment Principles (diversification, risk/rewards, asset allocation)
- Investments – types, associated risks, choosing the right ones
- RRSPs, RRIFs and Annuities
- Income Tax (Federal, Provincial)
- Choosing a Planner
- Insurance

- iv. Provide each employee with a participant's manual, in the employee's language of choice, (English or French) including copies of the presentations as well as reference material for of the topics



presented by module.

- v. Meet with the project authority to discuss, review and address any revisions to the seminars based on participant feedback, if required.
- vi. Upon completion of the seminar, provide an individual one (1) hour complimentary consultation at the request of the participant to examine in detail and discuss their pension and personal financial questions.
- vii. Upon completion of the seminar, provide an actuarial analysis (at no additional cost) at the request of each participant that will compare disposable income at work versus disposable income for up to three projected retirement dates chosen by the participant as well as an elective service analysis (buy back of service) to determine potential benefits.

### **5.5 Constraints:**

All seminars are to be delivered on the PSC premises located at 22 Eddy Street in Gatineau, Quebec.

All consultations will take place at the office of the subject matter expert who delivers Module 5- Financial Planning

Each seminar will be presented to a maximum of 35 participants, over a three (3) day period Between 8:30 am and 4pm. The dates of the seminars will be determined by the project authority upon contract award.

All course preparation must be conducted at the contractor's place of business.

Upon receipt of the seminar evaluation results (which will include feedback from the participant), the contractor shall make any changes (revisions to the curriculum content) in order to address issues on concern raise.

### **5.6 Client Support:**

The PSC will provide a room at 22 Eddy equipped with the audio-visual equipment, flipcharts, markers, etc. as requested by the contractor and accepted by the Project Authority.

Before each seminar, the PSC will provide the contractor the number and a list of participant names.

At the end of each 3-day seminar, the PSC will send an electronic evaluation to all course participants and will forward the results to the contractor in the event that there are any changes/revisions that should be made to the curriculum content.

### **5.7 Deliverables:**

The contractor shall deliver the following:

- a. A list of requirements (audio visual equipment, number of flipcharts, classroom set-up, etc.) required for each seminar. This list shall be electronically sent to the project authority at least two weeks in advance of the scheduled seminar;
- b. Detailed course description that includes learning objectives, nature and scope of modules, primary methods and approaches of delivery, pedagogical materials (participants manual, handouts, PowerPoint slides) along with an agenda for the 3-day seminars within 2 weeks after contract award;
- c. Delivery of up to six 3-day seminars (three in English, three in French) within the initial contract period;
- d. A participant's manual to be distributed to each participant in their choice of official language on the first day of each 3-day seminar;

- e. Additional materials such as current publications and brochures of information to be distributed to each participant in their choice of official language during the course of each 3-day seminar.
- f. An individual complimentary one hour consultation with each participant, available upon their request, to examine in detail and discuss financial questions. The participant may be accompanied by their spouse or partner;
- g. a customized Actuarial Analysis at no cost as well as an elective service analysis per participant upon their request
- h. The format and deliverables schedule shall be discussed with and accepted by the Project Authority following contract award.

### **5.8 Travel:**

Work for this contract will be in the National Capital Region (NCR) and there will be no need for any travel.

### **5.9 Security Requirements:**

1. The Contractor/Offeror must, at all times during the performance of the Contract, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
2. The Contractor/Offeror personnel requiring access to sensitive work site(s) must EACH hold a valid **RELIABILITY STATUS**, granted or approved by the PSC.
3. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of the PSC.
4. The Contractor/Offeror must comply with the provisions of the:
  - a) Security Requirements Check List, attached at Annex **E**;
  - b) Industrial Security Manual (Latest Edition).

### **5.10 Official Languages:**

The PSC is under the obligation to respect the spirit and the letter of the Official Languages Act. It is imperative that the contractor's proposed team deliver the course modules in the language of the seminar. The participant's manual and additional publications and brochures must be distributed to the participants during each seminar in the language of the seminar.

### **5.11 Intellectual Property:**

The Intellectual Property will vest with the contractor.

### **5.12 Green Procurement and Services:**

The contractor should make every effort to ensure that all documents prepared or delivered are printed double-sided on Ecology certified recycled paper or on paper with equivalent post-consumer recycled content to the full extent to which it is procurable.

## **6. TASK AUTHORIZATION**

### **6.1 TA Form**

All work to be provided under this Contract on an "as and when requested" basis will be ordered by PSC using form PSC 3351 (Attachment 2 to the RFP).

## **6.2 TA Limit and Approval Authority:**

The Department Representative may approve TAs up to a limit of \$25,000.00 per TA ("TA limit") including any amendments thereto and applicable taxes.

## **6.3 TA Request:**

It is understood and agreed by the Contractor that the work to be provided under a TA is on an 'as and when requested' basis and it is further agreed that:

- (a) an obligation will come into force only when there is a TA issued and only to the extent designated in the TA;
- (b) the work to be performed under any TA including any amendments thereto shall fall within the scope of work described in Appendix D, Statement of Work of the resulting Contract.
- (c) any and all authorized TAs shall incorporate all the articles, terms and conditions contained or referenced in the resulting Contract;
- (d) a TA will use as a basis of payment the firm per seminar fee not to exceed a financial limitation, in accordance with the rates established in the Appendix C, Terms of Payments of the resulting contract.
- (e) the cumulative value of all authorized TAs must not to exceed the value of the resulting Contract.
- (f) the Contractor shall not be paid for providing any information in relation to the preparation of a TA Request, nor for preparing and providing a proposal in relation to a TA;
- (g) whether or not to approve or issue a TA or an amendment thereto is entirely within the discretion of the PSC Department Representative as the case may be; and
- (h) the Contractor shall not commence work until an approved TA Request has been received from the PSC Department Representative, as the case may be. Any and all work performed in respect of a TA, in the absence of an approved TA, will be done at the Contractor's own risk, and Canada shall not be liable for payment therefor. In the event that the Contractor elects to proceed with the performance of any work that is outside an approved TA, in anticipation of the issuance, or a modification to, a TA, or otherwise, the Contractor acknowledges that it does so at its own risk.

## **6.4 TA Process**

**Step 1:** If a required Task(s) is identified, the Department Representative may request information from the Contractor in relation to the preparation of a TA Request, or may proceed with Step 2. The Contractor shall provide the requested information within two (2) working days of the request.

**Step 2 :** Using the TA form, the Department Representative will provide the Contractor with a TA Request. The TA Request will contain a plan that identifies and describes all work to be carried out under the TA, and corresponding level of effort of each, a schedule, and the proposed Basis and Method of Payment. The Contractor shall sign and return the signed TA within two (2) working days of the request.

## **7. PERIOD OF PROPOSED CONTRACT**

The period of the proposed contract shall be from the date of contract award to 2016-03-31.

### **7.1 Option to extend Contract:**

The contractor hereby grants to Canada the irrevocable option to extend the period of the Contract by up to two (2) additional one (1) year periods under the same terms and conditions. It is estimated that up to four

(4) seminars may be required during each optional period.

Canada may exercise this option at any time by sending a written notice to the Contractor prior to the Contract expiry date, or any extension thereof. The Contractor agrees that, during the extended period of the Contract, the rates/prices will be in accordance with the provisions of the Contract.

The option may only be exercised by the Contracting Authority and will be evidenced, for administrative purpose only, through a formal Contract Amendment.

**8. EVALUATION CRITERIA AND SELECTION METHOD**

Bidders are advised to address each requirement in sufficient depth to permit a complete requisite analysis and assessment by the Evaluation Team. Proposals failing to adequately respond to the mandatory requirements will be excluded from further considerations. Only proposals found to meet the mandatory requirements will be evaluated for additional rated requirements. Your technical proposal should address each of the requirements in the order in which they appear.

For evaluation purpose, one (1) year is defined as twelve (12) cumulative months, and a Project will only be accepted if they are at least three (3) months in duration.

**8.1 Mandatory Requirements:**

<b>RFP Reference</b>	<b>Requirements</b>	<b>References Section / Page in Bidder's Proposal</b>
M1	<p>A completed and signed "Proposal to the Public Service Commission Bidder Information and Authorization" form as provided on Page 4 (page after Table of Contents) of this solicitation document <b>MUST</b> be included in the technical proposal portion of the proposal. The Bidder's signature indicates acceptance of the terms and conditions set out herein.</p> <p><b>Bidders who do not submit the "Proposal to the Public Service Commission Bidder Information and Authorization" form with their proposals will have 72 hours (three business days) to provide it. If the copies are not provided within the 72 hours, the proposal will be deemed non-compliant.</b></p>	
M2	<p>The Bidder <b>MUST</b> submit with its technical proposal, completed and signed copies of all certification clauses provided in <b>PART 4 - CERTIFICATIONS</b>.</p> <p><b>Bidders who do not submit the copies duly completed and signed with their proposals will have 72 hours (three business days) to provide them. If the copies are not provided within the 72 hours, the proposal will be deemed non-compliant.</b></p>	

<p>M3</p>	<p>The Bidder <b>MUST</b> demonstrate that it has provided a team of resources (subject matter experts) to prepare and deliver pre-retirement planning seminars on at least 3 different occasions in English and 3 different occasions in French to federal department(s) or agency(ies).</p> <p>The Bidder <b>MUST</b> demonstrate that each seminar included the following topics:</p> <ul style="list-style-type: none"> <li>- Entitlements in retirement (PSSA and provisions of the Federal Public Service Pension )</li> <li>- Estate Planning</li> <li>- Psychological and sociological aspects of retirement</li> <li>- Physical health and well-being</li> <li>- Financial Planning</li> </ul> <p style="text-align: center;">AND</p> <p>was delivered in a classroom setting to a minimum of 20 participants</p> <p>Bidders should provide the following details as to how the stated experience was obtained:</p> <ul style="list-style-type: none"> <li>- Name of the client organization</li> <li>- Start and end dates of the seminars</li> <li>- Languages of sessions</li> <li>- Nature and scope of services provided</li> <li>- Roles and responsibilities of resources (subject matter experts)</li> <li>- At least one reference that can attest the experience for each seminar.</li> </ul>	
<p>M4</p>	<p>The Bidder <b>MUST</b> provide a team of subject matter experts to prepare and to deliver the pre-retirement seminars in English and French; it is acceptable that the English and French modules be delivered by two (2) different qualified subject matter experts.</p> <p>The Bidder <b>MUST</b> complete and include the table 1.0 Proposed Resources per Module (Attachment 1 to RFP) in its bid:</p>	
<p>M5</p>	<p>The Bidder <b>MUST</b> include a detailed curriculum vitae (CV) for Each proposed resource. The CV should be chronological (ex.: June 1, 2009 to September 30, 2014) and include sufficient details to enable a full evaluation.</p>	

M6	<p>The Bidder <b>MUST</b> demonstrate that Each resource proposed in <b>Module 1 - Entitlements in retirement</b> has as a minimum:</p> <ul style="list-style-type: none"> <li>• a certification given by Superannuation, Pension Transition and Client Services Sector (SPTCSS) of Public Works and Government Services Canada (PWGSC) to deliver retirement Planning Information Sessions on the PSSA and provisions ; the Federal Public Service Pension Plan (A copy of the certification <b>MUST</b> be included in the proposal);</li> </ul> <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> <li>• five (5) years of experience in providing advice on the Public Service Pension Plan in the context of preparing for retirement to groups or individuals.</li> </ul>	
M7	<p>The Bidder <b>MUST</b> demonstrate that Each resource proposed in <b>Module 1 - Entitlements in Retirement</b> has prepared and delivered at least three (3) information sessions to federal public employees on the Federal Public Service Pension Plan over the past 2 years.</p> <p>Bidders should provide the following details as to how the stated experience was obtained:</p> <ul style="list-style-type: none"> <li>• Name of the client organization and contact information</li> <li>• Start and end dates of the seminars</li> <li>• Nature and scope of services provided</li> <li>• Roles and responsibilities of resources (subject matter experts)</li> <li>• A minimum of one reference that can attest experience and provision of services</li> </ul> <p><i>Note :</i> Each session <b>MUST</b> consist of at least three (3) hours of instruction to a minimum of twenty (20) participants.</p>	
M8	<p>The Bidder <b>MUST</b> demonstrate that Each resource proposed in <b>Module 2 - Estate Planning</b> has as a minimum:</p> <ul style="list-style-type: none"> <li>• a law degree (e.g. Bachelor of Laws (LL.B.) or Bachelor of Civil Law (B.C.L.) degree) from a recognized Canadian university or a Certificate of Qualification issued by the National Committee on Accreditation (NCA) of the Federation of Law Societies of Canada. A copy of the degree or a copy of the certification <b>MUST</b> be included in the proposal;</li> </ul> <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> <li>• five (5) years of experience in providing legal advice on the topic of Wills and Estate Planning within the context of preparing for retirement to groups or individuals.</li> </ul>	

M9	<p>The Bidder <b>MUST</b> demonstrate that Each resource proposed in <b>Module 2 - Estate Planning</b> has prepared and delivered at least three (3) information sessions to federal public employees on estate planning, wills and power of attorney over the past 2 years.</p> <p>Bidders should provide the following details as to how the stated experience was obtained:</p> <ul style="list-style-type: none"> <li>• Name of the client organization and contact information</li> <li>• Start and end dates of the seminars</li> <li>• Nature and scope of services provided</li> <li>• Roles and responsibilities of resources (subject matter experts)</li> </ul> <p><i>Note :</i> Each session <b>MUST</b> consist of at least three (3) hours of instruction to a minimum of twenty (20) participants.</p>	
M10	<p>The Bidder <b>MUST</b> demonstrate that Each resource proposed in <b>Module 3 - Psychological and sociological aspects of retirement</b> has as a minimum :</p> <ul style="list-style-type: none"> <li>• a Bachelor degree in Psychology or a master’s degree in a related field. A copy of the degree <b>MUST</b> be included in the proposal;</li> </ul> <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> <li>• five (5) years of experience in providing psychological counselling services to groups or individuals;</li> </ul>	
M11	<p>The Bidder <b>MUST</b> demonstrate that Each resource proposed in <b>Module 3 - Psychological and sociological aspects of retirement</b> has prepared and delivered at least three (3) information sessions to federal public employees on the psychological and sociological aspects of retirement over the past two (2) years.</p> <p>Bidders should provide the following details as to how the stated experience was obtained:</p> <ul style="list-style-type: none"> <li>• Name of the client organization and contact information</li> <li>• Start and end dates of the seminars</li> <li>• Nature and scope of services provided</li> <li>• Roles and responsibilities of resources (subject matter experts)</li> </ul> <p><i>Note :</i> Each session must consist of at least three (3 hours) of instruction to a minimum of twenty (20) participants.</p>	
M12	<p>The Bidder <b>MUST</b> demonstrate that Each resource proposed in <b>Module 4 -Physical health and well-being</b> has as a minimum :</p> <ul style="list-style-type: none"> <li>• a valid permit to practice medicine or nursing in Canada. A copy of the permit <b>MUST</b> be included in the proposal;</li> </ul> <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> <li>• 5 years of experience providing advice on health issues and healthy aging to group or individuals;</li> </ul>	

<p>M13</p>	<p>The Bidder <b>MUST</b> demonstrate that Each resource proposed <b>in Module 4 - Physical health and well-being</b> has prepared and delivered at least three (3) information sessions to federal public employees on physical health and well-being over the past 2 years.</p> <p>Bidders should provide the following details as to how the stated experience was obtained:</p> <ul style="list-style-type: none"> <li>• Name of the client organization and contact information</li> <li>• Start and end dates of the seminars</li> <li>• Nature and scope of services provided</li> <li>• Roles and responsibilities of resources (subject matter experts)</li> </ul> <p><i>Note :</i> Each session <b>MUST</b> consist of at least three (3 hours) of instruction to a minimum of twenty (20) participants.</p>	
<p>M14</p>	<p>The Bidder <b>MUST</b> demonstrate that Each resource proposed <b>in Module 5 - Financial Planning</b> has as a minimum :</p> <ul style="list-style-type: none"> <li>• a certified financial planner (CFP) professional designation. A copy of the Certification or designation <b>MUST</b> be included in the proposal;</li> </ul> <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> <li>• five (5) years of experience in providing advice on Income Security Programs and Financial Planning to groups or individuals;</li> </ul>	
<p>M15</p>	<p>The Bidder <b>MUST</b> demonstrate that Each proposed resource <b>in Financial Planning</b> has prepared and delivered at least three (3) information sessions to federal public employees on financial planning over the past 2 years.</p> <p>Bidders should provide the following details as to how the stated experience was obtained:</p> <ul style="list-style-type: none"> <li>• Name of the client organization and contact information</li> <li>• Start and end dates of the seminars</li> <li>• Nature and scope of services provided</li> <li>• Roles and responsibilities of resources (subject matter experts)</li> </ul> <p><i>Note :</i> Each session must consist of at least three (3) hours of instruction to a minimum of (20) participants.</p>	

**8.2 Rated Requirements:**

In order to qualify for the rating process, proposals **MUST** respond to the following rated requirements in the **order shown** and **MUST** include the referenced Section/Page in the Bidder’s proposal.

Any element not included or not shown will be assigned a score of zero (0) points under the scoring system. The evaluation to be performed by the PSC will be based solely on information contained in the proposal. The PSC may request clarification from a Bidder of information provided but will not ask for or use additional information beyond that provided in the proposal.



Please note that partial points will not be awarded.

The Bidder should provide complete details as to where, when (month and year), and how (through which activities/responsibilities), the stated qualifications/experience of its proposed resource were obtained. In situations in which a proposed resource worked at the same time on more than one project, only one project will be counted toward any requirements that relate to the individual's length of experience.

RFP Reference	Requirements Technical Rating	Points	References Section / Page in Bidder's Proposal
R1	<p>The Bidder should demonstrate its experience in preparing and delivering pre-retirement seminars in both English and French to a group of at least twenty (20) participants; Bidders should provide the following details as to how the stated experience was obtained:</p> <ul style="list-style-type: none"> <li>• Name of the client organization</li> <li>• Start and end dates of the seminars</li> <li>• Language of seminars</li> <li>• Nature and scope of services provided</li> <li>• Roles and responsibilities of Bidder</li> <li>• At least one reference that can attest the experience for this criteria.</li> </ul>	<p><b>Maximum 20 points</b></p> <p>≤ 3 seminars = 0</p> <p>4 seminars in English = 1</p> <p>4 seminars in French = 1</p> <p>5 seminars in English = 3</p> <p>5 seminars in French = 3</p> <p>&gt; 5 seminars in English = 10</p> <p>&gt; 5 seminars in French = 10</p>	
R2	<p>The Bidder should demonstrate that Each resource proposed in Module 1 - <b>Entitlements in Retirement</b> has experience in preparing and delivering information sessions to federal public employees on the Public Service Pension Plan over the past two (2) years in a classroom setting of at least 20 participants.</p> <p>Bidders should provide the following details as to how the stated experience was obtained:</p> <ul style="list-style-type: none"> <li>• Name of the client organization and contact information</li> <li>• Start and end dates of the seminars</li> <li>• Nature and scope of services provided</li> <li>• Roles and responsibilities of proposed resource(s)</li> </ul> <p>If the English and French modules are to be delivered by two (2) different proposed resources, the total score will be combined for evaluation purposes.</p>	<p><b>Maximum 20 points</b></p> <p>≤3 sessions = 0 ;</p> <p>4 sessions in English = 1;</p> <p>4 sessions in French = 1;</p> <p>5 sessions in English = 3;</p> <p>5 sessions in French = 3;</p> <p>6 to 10 sessions in English = 5;</p> <p>6 to 10 sessions in French = 5;</p> <p>&gt;10 sessions in English = 10;</p> <p>&gt;10 sessions in French = 10</p>	

<p>R3</p>	<p>The Bidder should demonstrate that Each resource proposed in <b>Module 2 - Estate Planning</b> has prepared and delivered at least three (3) information sessions to federal public employees on the Public Service Pension Plan over the past two (2) years in a classroom setting of at least 20 participants.</p> <p>Bidders should provide the following details as to how the stated experience was obtained:</p> <ul style="list-style-type: none"> <li>• Name of the client organization and contact information</li> <li>• Start and end dates of the seminars</li> <li>• Nature and scope of services provided</li> <li>• Roles and responsibilities of proposed resource(s)</li> </ul> <p>If the English and French modules are to be delivered by two (2) different proposed resource, the total score will be combined for evaluation purposes.</p>	<p><b>Maximum 20 points</b></p> <p>≤ 3 sessions = 0 ;</p> <p>4 sessions in English = 1;</p> <p>4 sessions in French = 1;</p> <p>5 sessions in English = 3;</p> <p>5 sessions in French = 3;</p> <p>6 to 10 sessions in English = 5;</p> <p>6 to 10 sessions in French = 5;</p> <p>&gt;10 sessions in English = 10;</p> <p>&gt;10 sessions in French = 10</p>	
<p>R4</p>	<p>The Bidder should demonstrate that Each resource proposed in <b>Module 4 - Physical health and well-being</b> has prepared and delivered at least three (3) information sessions to federal public employees on the Public Service Pension Plan over the past two (2) years in a classroom setting of at least 20 participants.</p> <p>Bidders should provide the following details as to how the stated experience was obtained:</p> <ul style="list-style-type: none"> <li>• Name of the client organization and contact information</li> <li>• Start and end dates of the seminars</li> <li>• Nature and scope of services provided</li> <li>• Roles and responsibilities of proposed resource(s)</li> </ul> <p>If the English and French modules are to be delivered by two (2) different proposed resource, the total score will be combined for evaluation purposes.</p>	<p><b>Maximum 20 points</b></p> <p>≤3 sessions = 0 ;</p> <p>4 sessions in English = 1;</p> <p>4 sessions in French = 1;</p> <p>5 sessions in English = 3;</p> <p>5 sessions in French = 3;</p> <p>6 to 10 sessions in English = 5;</p> <p>6 to 10 sessions in French = 5;</p> <p>&gt;10 sessions in English = 10;</p> <p>&gt;10 sessions in French = 10</p>	

<p>R5</p>	<p>The Bidder should demonstrate that Each resource proposed in <b>Module 3 - psychological and sociological aspects of retirement</b> has prepared and delivered at least three (3) information sessions to federal public employees on the Public Service Pension Plan over the past two (2) years in a classroom setting of at least 20 participants.</p> <p>Bidders should provide the following details as to how the stated experience was obtained:</p> <ul style="list-style-type: none"> <li>• Name of the client organization and contact information</li> <li>• Start and end dates of the seminars</li> <li>• Nature and scope of services provided</li> <li>• Roles and responsibilities of proposed resource(s)</li> </ul> <p>If the English and French modules are to be delivered by two (2) different proposed resource, the total score will be combined for evaluation purposes.</p>	<p><b>Maximum 20 points</b></p> <p>≤3 sessions = 0 ;</p> <p>4 sessions in English = 1;</p> <p>4 sessions in French = 1;</p> <p>5 sessions in English = 3;</p> <p>5 sessions in French = 3;</p> <p>6 to 10 sessions in English = 5;</p> <p>6 to 10 sessions in French = 5;</p> <p>&gt;10 sessions in English = 10;</p> <p>&gt;10 sessions in French = 10</p>	
<p>R6</p>	<p>The Bidder should demonstrate that Each proposed resource in <b>Module 5 - Financial Planning</b> has prepared and delivered at least three (3) information sessions to federal public employees on the Public Service Pension Plan over the past two (2) years in a classroom setting of at least 20 participants.</p> <ul style="list-style-type: none"> <li>• Name of the client organization and contact information</li> <li>• Start and end dates of the seminars</li> <li>• Nature and scope of services provided</li> <li>• Roles and responsibilities of proposed resource(s)</li> </ul> <p>If the English and French modules are to be delivered by two (2) different proposed resource, the total score will be combined for evaluation purposes.</p>	<p><b>Maximum 20 points</b></p> <p>≤3 sessions = 0 ;</p> <p>4 sessions in English = 1;</p> <p>4 sessions in French = 1;</p> <p>5 sessions in English = 3;</p> <p>5 sessions in French = 3;</p> <p>6 to 10 sessions in English = 5;</p> <p>6 to 10 sessions in French = 5;</p> <p>&gt;10 sessions in English = 10;</p> <p>&gt;10 sessions in French = 10</p>	
	<p>Total Maximum Points Available</p>	<p>120 points</p>	

**8.3 Contractor Selection Method - Highest responsive combined overall rating (60/40):**

All proposals will be rated on technical acceptability before the financial proposal is considered. The proposal which achieves the highest responsive combined rating of technical merit (60%) and price (40) will be chosen.

Neither the responsive proposal that scores the highest technical number of rated points nor the one that contains the lowest price will necessarily be accepted.

Technical Points (A)	<u>Offeror's technical points</u> X 60 Maximum technical points
Financial points (B)	<u>Lowest proposed price</u> X 40 Offeror's proposed price
Total	A + B

Where two (2) or more responsive proposals achieve the identical point rating, the proposal which achieved the highest technical rating will be recommended for award of a contract.

**9. ABORIGINAL SUPPLIER**

**9.1 Self-identification:**

The PSC has made a commitment to increase contracting actions between the federal government and Aboriginal businesses, in accordance with The Procurement Strategy for Aboriginal Business. In order to assist the PSC in reporting contracting activities with Aboriginal businesses, it is important that Aboriginal Bidders identify themselves as such by completing and providing appropriate Certification Requirements which have been developed by the Department of Indian and Northern Affairs Canada.

## 10. CERTIFICATION

Bidders must provide the required certifications to be issued a Contract. The PSC will declare a bid non-responsive if the required certifications are not completed and submitted as requested.

Compliance with the certifications Bidders provide to the PSC is subject to verification by the PSC during the bid evaluation period (before issuance of a Contract) and after issuance of a Contract. The PSC Contracting Authority will have the right to ask for additional information to verify the Bidders' compliance with the certifications before issuance of a Contract. The bid will be declared non-responsive if any certification made by the Bidder is untrue, whether made knowingly or unknowingly. Failure to comply with the certifications or to comply with the request of the PSC Contracting Authority for additional information will also render the bid non-responsive.

### 10.1 Certifications Precedent to Issuance of a Contract

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

#### 10.1.1 Federal Contractors Program for Employment Equity – Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list ([http://www.labour.gc.ca/eng/standards\\_equity/eq/emp/fcp/list/inelig.shtml](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)) available from [Human Resources and Skills Development Canada \(HRSDC\) - Labour's](#) website

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](#)" list at the time of contract award.

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Signature of authorized representative

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Date

#### 10.1.2 Former Public Servant Certification

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

#### Definitions

For the purposes of this clause,

1. "Former public servant" means a former member of a department as defined in the *Financial*

*Administration Act*, R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police and includes:

- a) an individual;
  - b) an individual who has incorporated;
  - c) a partnership made up of former public servants; or
  - d) a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.
2. "lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the Public Service.
3. "pension" means a pension payable pursuant to the *Public Service Superannuation Act*, R.S., 1985, c. P-36 as indexed pursuant to the *Supplementary Retirement Benefits Act*, R.S., 1985, c. S-24.

#### **Former Public Servant in Receipt of a Pension**

Bidders who are former public servants in receipt of a pension must identify themselves as such by completing the following:

- The bidder is a former public servant in receipt of a pension;
- The bidder is a former public servant in receipt of a pension who has incorporated;
- The bidder is a partnership made up of former public servant in receipt of a pension;
- The bidder is a former public servant in receipt of a pension who his the sole proprietorship or has a major interested in the entity;
- The bidder is a former public servant not in receipt of a pension.
- The bidder is NOT a former public servant.

If the Bidder is a FPS in receipt of a pension, the Bidder must provide the following information:

- a) name of the former public servant \_\_\_\_\_
- b) date of termination of employment or retirement from the Public Service \_\_\_\_\_
- c) former maximum salary \_\_\_\_\_
- d) total annual (gross) pension \_\_\_\_\_

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

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of a work force reduction program?

**YES ( ) NO ( )**

If so, the Bidder must provide the following information:

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

For all contracts awarded during the lump sum payment period, the total amount of fee that may be paid to a FPS who received a lump sum payment is \$5,000, including the Goods and Services Tax or Harmonized Sales Tax.

**Certification**

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

\_\_\_\_\_  
Signature of authorized representative

\_\_\_\_\_  
Date

**10.1.3 Certification of Education and Experience:**

The bidder hereby certifies that all statements made with regard to the education and experience of individuals proposed for completing the subject work are accurate and factual, and that the PSC reserves the right to verify any information provided in this regard and that untrue statements may result in the proposal being declared non-compliant or in other action which the PSC may consider appropriate.

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Signature of authorized representative

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Date

**10.1.4 Certification of Availability:**

The bidder certifies that, should it be authorized to provide services under any Contract resulting from this RFP, the individuals proposed in its bid will be available to commence performance of the work within the time specified in the RFP, and will remain available to perform the work in relation to the fulfilment of the requirement. Once the Contract is issued, proposed substitutes must achieve the same rated qualifications score (or greater) as the original resource at a rate no higher than the original resource being replaced and will be subject to approval by the project authority.

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Signature of authorized representative

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Date

**10.1.5 Conflict of Interest:**

The bidder certifies that he has not accepted or received, directly or indirectly, advantage, benefit, preferential treatment or assistance of any kind through a member of his family or a friend in relation to this RFP and any resulting contract.

The articles mentioned herein reference Standard Acquisition Clauses and Conditions (SACC) clauses, which are available in Full text at the following link: <https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>

The bidder acknowledges and agrees that it is a term of the resulting Contract that no person who is not in compliance with the provisions of [2010B 27 \(2008-05-12\) Conflict of Interest and Values and Ethics Codes for the Public Service](#) and [2010B 28 \(2008-05-12\) No Bribe or Conflict](#) shall derive any direct benefit from this Contract. The bidder further acknowledges and agrees that failure to comply with the provisions of section 27 and section 28 of 2010B (2008-05-12) referenced herein and copied below for references will render the bidder ineligible to provide services under any Contract resulting from this RFP.

The bidder further acknowledges and agrees that failure to comply with the provisions of section 27 and section 28 of 2010B (2008-05-12) referenced herein and copied below for references will render the bidder ineligible to provide services under any Contract resulting from this RFP.

**2010B 27 (2008-05-12) Conflict of Interest and Values and Ethics Codes for the Public Service**

The Contractor acknowledges that individuals who are subject to the provisions of the [Conflict of Interest Act](#), 2006, c. 9, s. 2, the *Conflict of Interest Code for Members of the House of Commons*, the *Values and Ethics Code for the Public Service* or all other codes of values and ethics applicable within



specific organizations cannot derive any direct benefit resulting from the Contract.

**2010B 28 (2008-05-12) No Bribe or Conflict**

1. The Contractor declares that no bribe, gift, benefit, or other inducement has been or will be paid, given, promised or offered directly or indirectly to any official or employee of Canada or to a member of the family of such a person, with a view to influencing the entry into the Contract or the administration of the Contract.
2. The Contractor must not influence, seek to influence or otherwise take part in a decision of Canada knowing that the decision might further its private interest. The Contractor must have no financial interest in the business of a third party that causes or would appear to cause a conflict of interest in connection with the performance of its obligations under the Contract. If such a financial interest is acquired during the period of the Contract, the Contractor must immediately declare it to the Contracting Authority.
3. The Contractor warrants that, to the best of its knowledge after making diligent inquiry, no conflict exists or is likely to arise in the performance of the Contract. In the event the Contractor becomes aware of any matter that causes or is likely to cause a conflict in relation to the Contractor's performance under the Contract, the Contractor must immediately disclose such matter to the Contracting Authority in writing.
4. If the Contracting Authority is of the opinion that a conflict exists as a result of the Contractor's disclosure or as a result of any other information brought to the Contracting Authority's attention, the Contracting Authority may require the Contractor to take steps to resolve or otherwise deal with the conflict or, at its entire discretion, terminate the Contract for default. Conflict means any matter, circumstance, interest, or activity affecting the Contractor, its personnel or subcontractors, which may or may appear to impair the ability of the Contractor to perform the Work diligently and independently.

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Signature of authorized representative

Date

**10.1.6 Language Certification:**

The Bidder certifies that each proposed resource, has an advanced reading, oral interaction and writing proficiency in both English AND/OR French, as identified by the resource in Table 1.0- Proposed Resources per module within Attachment 1 to the RFP.

For the purpose of this RFP and resulting Contract, an individual who is “advanced” in English and / or French can **as a minimum** perform the following tasks in **English AND/OR French**:

**Advanced Reading Proficiency:**

Ability to understand texts dealing with a wide variety of work-related topics; ability to understand most complex details, interferences and fine points of meanings; ability to read with good comprehension specialized or less familiar material.

**Advanced Oral Interaction Proficiency:**

Ability to give detailed explanations and descriptions; ability to handle hypothetical questions; ability to support an opinion, defend a point of view, or justify an action; ability to counsel and give advice; ability to handle complex work-related situations.

**Advanced Writing Proficiency:**

Ability to write explanations or descriptions in a variety of informal and formal work-related situations;

ability to write texts in which the ideas are developed and presented in which vocabulary, grammar and spelling are generally appropriate and require few corrections.

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Signature of authorized representative

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Date

### **10.1.7 Certificate of Independent Bid Determination**

I, the undersigned, in submitting the accompanying bid or tender (hereinafter "bid") to the Public Service Commission for this Request for Proposal do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of:

---

(Corporate Name of Bidder or Tenderer [hereinafter "Bidder"])

That:

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the Bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the Bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the Bidder to determine the terms of, and to sign, the bid, on behalf of the Bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the Bidder, whether or not affiliated with the Bidder, who:
  - (a) has been requested to submit a bid in response to this call for bids;
  - (b) could potentially submit a bid in response to this call for bids, based on their qualifications, abilities or experience;
6. The Bidder discloses that (check one of the following, as applicable):
  - ( ) the Bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with, any competitor;
  - ( ) the Bidder has entered into consultations, communications, agreements or arrangements with one or more competitors regarding this call for bids, and the Bidder discloses, in the attached document(s), complete details thereof, including the names of the competitors and the nature of, and reasons for, such consultations, communications, agreements or arrangements;
7. In particular, without limiting the generality of paragraphs (6)(a) or (6)(b) above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
  - (a) prices;
  - (b) methods, factors or formulas used to calculate prices;
  - (c) the intention or decision to submit, or not to submit, a bid; or

- (d) the submission of a bid which does not meet the specifications of the call for bids; except as specifically disclosed pursuant to paragraph (6)(b) above;
- 8. In addition, there has been no consultation, communication, agreement or arrangement with any competitor regarding the quality, quantity, specifications or delivery particulars of the products or services to which this call for bids relates, except as specifically authorized by the Tendering Authority or as specifically disclosed pursuant to paragraph (6)(b) above;
- 9. The terms of the accompanying bid have not been, and will not be, knowingly disclosed by the Bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening, or of the awarding of the contract, whichever comes first, unless otherwise required by law or as specifically disclosed pursuant to paragraph (6)(b) above.

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Signature of authorized representative

Date

### Attachment 1 to Request For Proposal

Table 1.0 – Proposed Resources per module

<b>Number</b>	<b>Modules</b>	<b>Name(s) of proposed resource per module</b>	<b>Language of delivery (English and French or English or French)</b>
1	Entitlements in retirement		English
			French
2	Estate Planning		English
			French
3	Psychological and sociological aspects of retirement		English
			French
4	Physical health and well-being		English
			French
5	Financial Planning		English
			French

## Attachment 2 to Request For Proposal

Commission de la fonction publique du Canada	Public Service Commission of Canada	N° de référence Reference no. LL14-0495552	N° du contrat Contract no.
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### CONTRAT D'AUTORISATION      TASK AUTHORIZATION DU TRAVAIL                              CONTRACT

Nom de l'entrepreneur - Name of contractor	Période du contrat - Period of contract	N° d'obligation - Obligation no.
	Du From                              Au To	
Adresse de l'entrepreneur - Address of contractor		
Description des travaux à effectuer - Description of work performed		

**REPRÉSENTANT MINISTÉRIEL DE LA CFP - PSC DEPARTMENTAL REPRESENTATIVE**

Nom - Name	N° de téléphone - Telephone no.
Titre du poste - Position title	

**COÛTS ESTIMATIFS - ESTIMATED COSTS**

Modalités de paiement Payment terms	
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Nom de la ressource Name of resource	Nbre de jours/heures/mots No. of days/hours/words	Taux par jour/heure/mot Rate per day/hour/word	Coût estimatif Estimated cost
	0.00	0.00	0.00
	0.00	0.00	0.00
	0.00	0.00	0.00
	0.00	0.00	0.00
<b>TOTAL</b>			<b>\$0.00</b>

La Commission de la fonction publique du Canada, à l'achèvement des travaux et après avoir reçu la facture, devra payer à l'entrepreneur la somme de (excluant TPS/TVH) :

The Public Service Commission of Canada in consideration for the performance of the work and after receipt of invoice, shall pay the Contractor the sum of (excluding GST/HST):

**\$ 0.00**

Faire parvenir la facture à : - The invoice should be sent to:

Le contrat sera administré et interprété selon les lois en vigueur dans la province de :

This contract shall be governed by and construed in accordance with the laws in force in the Province of:

La présente entente est rédigée en fonction de l'arrangement en matière d'approvisionnement (AP). Toutes les modalités comprises dans cet arrangement s'appliquent.

This document takes into account the Supply Arrangement (SA) document; all terms and conditions of the Supply Arrangement apply.

**APPROBATION DU CONTRAT - CONTRACT APPROVAL**

<b>Pour l'entrepreneur - For the contractor</b> Signature _____ Date _____	<b>Pour sa majesté - For her majesty</b> Signature _____ Date _____
---	--

PSC 3351 (2013-12-31)

Envoyé au bureau d'approvisionnement  
Sent to Procurement office





Commission de la fonction publique du Canada / Public Service Commission of Canada

N° du contrat Contract no.
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**MODIFICATION DU CONTRAT / TASK AUTHORIZATION  
D'AUTORISATION DU TRAVAIL / CONTRACT AMENDMENT**

entre la / Commission de la fonction publique du Canada  
between the / Public Service Commission of Canada

et /  
and

Motif de la modification - Reason for amendment
---

Modifier la période du contrat : / Non/No  
Change period of contract:

Du / From		Au / To	
-----------	--	---------	--

Modifier les modalités de paiement : / Non/No  
Change payment terms:

De - From		À - To	
-----------	--	--------	--

Modifier la description des travaux : / Non/No  
Change work description:

--

Modifier le coût estimatif : / Non/No  
Change estimated cost:

Nom de la ressource Name of resource	Nbre de jours/heures/mots No. of days/hours/words	Taux par jour/heure/mot Rate per day/hour/word	Coût estimatif Estimated cost
	0.00	0.00	0.00
	0.00	0.00	0.00
	0.00	0.00	0.00
	0.00	0.00	0.00
TOTAL RÉVISÉ REVISED TOTAL			\$0.00

**APPROBATION DE LA MODIFICATION - AMENDMENT APPROVAL**

<b>Pour l'entrepreneur - For the contractor</b>		<b>Pour sa majesté - For her majesty</b>	
Signature	Date	Signature	Date

Le contrat sera administré et interprété selon les lois en vigueur dans la province de : / This contract shall be governed by and construed in accordance with the laws in force in the Province of:

--

La présente entente est rédigée en fonction de l'arrangement en matière d'approvisionnement (AP). Toutes les modalités comprises dans cet arrangement s'appliquent.

This document takes into account the Supply Arrangement (SA) document; all terms and conditions of the Supply Arrangement apply.



Commission de la fonction publique  
du Canada

Public Service Commission  
of Canada

N° du contrat  
Contract no.

**ANNULATION DU CONTRAT  
D'AUTORISATION DU TRAVAIL**

**TASK AUTHORIZATION  
CONTRACT CANCELLATION**

entre la Commission de la fonction publique du Canada  
between the Public Service Commission of Canada

et  
and

Motif de l'annulation - Reason for cancellation
---

**APPROBATION DE L'ANNULATION - CANCELLATION APPROVAL**

Pour l'entrepreneur - For the contractor		Pour sa majesté - For her majesty	
Signature	Date	Signature	Date

Le contrat sera administré et interprété selon les lois en vigueur dans la province de :

This contract shall be governed by and construed in accordance with the laws in force in the Province of:

--

La présente entente est rédigée en fonction de l'arrangement en matière d'approvisionnement (AP). Toutes les modalités comprises dans cet arrangement s'appliquent.

This document takes into account the Supply Arrangement (SA) document; all terms and conditions of the Supply Arrangement apply.

**ANNEX A  
GENERAL CONDITIONS**

**ANNEX B  
SUPPLEMENTARY CONDITIONS**

**ANNEX C  
TERMS OF PAYMENT**

**The above documents are available at the following website:**  
**<http://www.psc-cfp.gc.ca/abt-aps/bus-aff/index-eng.htm>**



**ANNEX D  
BASIS OF PAYMENT**

**A- Initial Contract Period (From Contract Award to March 31, 2016)**

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

**1.0 Professional Fees**

Bidders must provide a firm and all-inclusive fee per seminar, inclusive of all expenses. A seminar will be delivered from 8:30 AM to 4:00 PM over 3 consecutive business days.

The Bidder's proposed Firm all-inclusive fee per seminar is to include all costs associated with the delivery of the seminar, including the design and development work, overhead, administrative costs, costs of deliverables and related materials, travel and accommodations.

The price quoted is to be exclusive of the Goods and Services Tax (GST) or the Harmonized Sales Tax (HST). **Please indicate taxes separately.**

Bidder's proposed firm all-inclusive fee per seminar	Estimated quantity of seminars to be delivered during the initial contract period	Extended Value
	6	
Applicable taxes: _____%		
<b>Total Estimated Cost of Seminar Fees including taxes for a Cumulative Total of all Approved Task Authorizations :</b>		\$ _____

**B. Optional periods**

The Bidder accepts to provide the services during option periods at the same rate.  
Estimated seminars per optional year is 4 seminars

# ANNEX E

## SECURITY REQUIREMENTS CHECK LIST (SRCL)



Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat CON14-1030
Security Classification / Classification de sécurité UNCLASSIFIED

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

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

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?  
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?  No / Non  Yes / Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel :  
Document Number / Numéro du document :

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

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

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

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

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

10. b) May unscreened personnel be used for portions of the work?  
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail?  No / Non  Yes / Oui

If Yes, will unscreened personnel be escorted?  
Dans l'affirmative, le personnel en question sera-t-il escorté?  No / Non  Yes / Oui

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

**PRODUCTION**

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

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

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

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

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité UNCLASSIFIED
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Contract Number / Numéro du contrat CON14-1030
Security Classification / Classification de sécurité UNCLASSIFIED

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

<b>PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE</b>		
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine Public Service Commission of Canada	2. Branch or Directorate / Direction générale ou Direction HRMD / CMB	
3. a) Subcontract Number / Numéro du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail Pre-retirement training seminars for PSc employees that will be offered onsite at 22 Eddy Street in Gatineau.		
5. a) Will the supplier require access to Controlled Goods? / Le fournisseur aura-t-il accès à des marchandises contrôlées? <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui		
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? / Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques? <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui		
6. Indicate the type of access required / Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? / Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c.) / (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c.) <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui		
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. / Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé. <input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui		
6. c) Is this a commercial courier or delivery requirement with no overnight storage? / S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit? <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui		
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>		
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:
7. c) Level of information / Niveau d'information		
PROTECTED A / PROTÉGÉ A <input type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET <input type="checkbox"/>
TOP SECRET <input type="checkbox"/>		TOP SECRET <input type="checkbox"/>
TRÈS SECRET <input type="checkbox"/>		TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) <input type="checkbox"/>
TRÈS SECRET (SIGINT) <input type="checkbox"/>		TRÈS SECRET (SIGINT) <input type="checkbox"/>



**PART C - (continued) / PARTIE C - (suite)**

For users completing the form manually use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.  
Les utilisateurs qui remplissent le formulaire manuellement doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form online (via the Internet), the summary chart is automatically populated by your responses to previous questions.  
Dans le cas des utilisateurs qui remplissent le formulaire en ligne (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

**SUMMARY CHART / TABLEAU RÉCAPITULATIF**

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

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?  
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?  No / Non  Yes / Oui
- If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".**  
**Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.**
12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?  
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?  No / Non  Yes / Oui
- If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).**  
**Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).**