

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

Proposal to / Propositions aux:
MACS-Bids@statcan.gc.ca

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

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

Solicitation No – N° de l'invitation :

1920-0017261

Solicitation closes – L'invitation prend fin

At – à : 14:00 EDT

On – le : September 14th, 2015

Name and title of person authorized to sign on behalf of vendor (type or print) – Nom et titre de la personne autorisée à signer au nom du fournisseur (caractère d'impression).

Name – Nom :

Title – Titre :

Date of Solicitation – Date de l'invitation:

August 5th, 2015

Address enquiries to – Adresser toute demande de renseignements à:

MACS-Bids@statcan.gc.ca

**Area code and Telephone No.
Code régional et N° de téléphone**

(613) 882-3151

**Facsimile No.
N° de télécopieur**

(613) 951-2073

Destination

MACS-Bids@Statcan.gc.ca

Instructions :

Municipal taxes are not applicable.

Unless otherwise specified herein by the Crown, all prices quotes are to be net prices in Canadian funds including Canadian customs duties, excise taxes, and are to be F.O.B., including all delivery charges to destination(s) as indicated. The amount of the Goods and Services Tax is to be shown as a separate item.

Instructions:

Les taxes municipales ne s'appliquent pas.

Sauf indication contraire, énoncée par la Couronne, dans les présentes, tous les prix indiqués sont des prix nets, en dollars canadiens, comprenant les droits de douane canadiens, la taxe d'accise et doivent être F.A.B., y compris tous frais de livraison à la (aux) destination(s) indiquée(s). La somme de la taxe sur les produits et services devra être un article particulier.

Vendor Name and Address – Raison sociale et adresse du fournisseur

Facsimile No – N° de télécopieur :

Telephone No – N° de téléphone :

Signature

Date



TABLE OF CONTENTS

PART 1 - GENERAL INFORMATION 3

1.1 INTRODUCTION 3

1.2 SUMMARY 3

1.3 DEBRIEFINGS 3

PART 2 - BIDDER INSTRUCTIONS 3

2.1 STANDARD INSTRUCTIONS, CLAUSES AND CONDITIONS 3

2.2 SUBMISSION OF BIDS..... 4

2.3 FORMER PUBLIC SERVANT 4

2.4 ENQUIRIES - BID SOLICITATION 5

2.5 APPLICABLE LAWS..... 5

PART 3 - BID PREPARATION INSTRUCTIONS..... 6

3.1 BID PREPARATION INSTRUCTIONS 6

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION 6

4.1 EVALUATION PROCEDURES 6

4.2 BASIS OF SELECTION 8

PART 5 - RESULTING CONTRACT CLAUSES..... 8

5.1 STATEMENT OF WORK..... 8

5.2 STANDARD CLAUSES AND CONDITIONS 9

5.3 SECURITY REQUIREMENTS..... 9

5.4 TERM OF CONTRACT 9

5.5 AUTHORITIES 9

5.6 PROACTIVE DISCLOSURE OF CONTRACTS WITH FORMER PUBLIC SERVANTS 10

5.7 PAYMENT 10

5.8 INVOICING INSTRUCTIONS 11

5.9 CERTIFICATIONS..... 11

5.10 APPLICABLE LAWS..... 11

5.11 PRIORITY OF DOCUMENTS..... 11

5.12 INSURANCE 12

5.13 CONTRACT CLAUSES - DISPUTE RESOLUTION SERVICES 12

5.14 CONTRACT CLAUSE - CONTRACT ADMINISTRATION 12

ANNEX “A” 13

STATEMENT OF WORK (SOW) 13

ANNEX “B” 15

BASIS OF PAYMENT 15

ANNEX “C” 16

TASK AUTHORIZATION FORM 16



PART 1 - GENERAL INFORMATION

1.1 Introduction

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

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

The Annexes include the Statement of Work, the Basis of Payment and the Task Authorization Form.

1.2 Summary

Statistics Canada requires a supplier to provide retirement planning training to its employee's.

The ever-growing rate of retirements is eventuating in rapid rate and STATCAN needs to offer its employees the tools necessary to prepare and plan for the future. The priority is for them to make appropriate decision that will lead to a successful transition to retirement. The course on retirement planning will:

- offer guidance any immediate issues with respect to retirement plans;
- provide a planning framework to help in planning long term goals; and
- provide specific information in the key area of lifestyle, pension, financial and estate planning.

The estimated period of the requirement is from the date of contract award until March 31st 2016 with two (2) option periods of one (1) year.

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

1.3 Debriefings

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

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) issued by Public Works and Government Services Canada.



Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

The [2003](#) (2015-07-03) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

"Subsection 3 of Section 01, Integrity Provisions - Bid of Standard Instructions [2003](#) incorporated by reference above is deleted in its entirety and replaced with the following:

3. List of Names

- a. Bidders who are incorporated or who are a sole proprietorship, including those bidding as a joint venture, have already provided a list of names of all individuals who are directors of the Bidder, or the name of the owner(s), at the time of submitting an arrangement under the Request for Supply Arrangement (RFSA).
- b. These Bidders must immediately inform Canada in writing of any changes affecting the list of directors during this procurement process.

2.2 Submission of Bids

Bids must be submitted only to Statistics Canada Bid Receiving(STATCAN Unit by the date, time and place indicated on page 1 of the bid solicitation.

Due to the nature of the bid solicitation, bids transmitted by facsimile to STATCAN will not be accepted.

2.3 Former Public Servant

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPSs, bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

Definitions

For the purposes of this clause, "former public servant" is any former member of a department as defined in the [Financial Administration Act](#), R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

- a. an individual;
- b. an individual who has incorporated;
- c. a partnership made of former public servants; or
- d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"pension" means a pension or annual allowance paid under the [Public Service Superannuation Act](#) (PSSA), R.S., 1985, c.P-36, and any increases paid pursuant to the [Supplementary Retirement Benefits Act](#), R.S., 1985, c. S-24 as it affects thePSSA. It does not include pensions payable pursuant to



the [Canadian Forces Superannuation Act](#), R.S., 1985, c. C-17, the [Defence Services Pension Continuation Act](#), 1970, c. D-3, the [Royal Canadian Mounted Police Pension Continuation Act](#), 1970, c. R-10, and the [Royal Canadian Mounted Police Superannuation Act](#), R.S., 1985, c. R-11, the [Members of Parliament Retiring Allowances Act](#), R.S. 1985, c. M-5, and that portion of pension payable to the [Canada Pension Plan Act](#), R.S., 1985, c. C-8.

Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension? **Yes** () **No** ()

If so, the Bidder must provide the following information, for all FPSs in receipt of a pension, as applicable:

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

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with [Contracting Policy Notice: 2012-2](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

Work Force Adjustment Directive

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **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 adjustment program.

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including Applicable Taxes.

2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than five (5) calendar days before the bid closing date. Enquiries received after that time may not be answered.

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated and the enquiry can be answered to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

2.5 Applicable Laws

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



Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidders.

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

Canada requests that Bidders provide their bid in separately bound sections as follows:

Section I: Technical Bid (One (1) soft copy) (In pdf Format)

Section II: Financial Bid (One (1) soft copy) (In pdf Format)

Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.

Canada 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 format;
- (b) use a numbering system that corresponds to the bid solicitation.

Section I: Technical Bid

In their technical bid, Bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying out the work.

The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that Bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, Bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

Section II: Financial Bid

- 3.1.1** Bidders must submit their financial bid in accordance with the Basis of Payment in Annex "B". The total amount of Applicable Taxes must be shown separately.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

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



4.1.1 Technical Evaluation

4.1.2 Mandatory Technical Criteria

Mandatory technical criteria (MTC)		
Bidder's experience	Description of mandatory technical criteria and bid preparation instructions	
MTC 1 - Bidder's education, experience in course design and development	The bidder must demonstrate that is has three (3) years experience within the last five (5) years of providing retirement training courses to federal government employees	
Experience of the bidder's proposed training instructors	Description of mandatory technical criteria and bid preparation instructions	
MTC 2 - Course outline	<p>The bidder must propose a course that provides proper training of the following subjects</p> <ol style="list-style-type: none"> 1. PENSION, to include: <ol style="list-style-type: none"> a. Service buyback b. Supplementary Death Benefit Plan – Retirement benefits c. Cost of living d. CPP/QPP Coordination e. Survivor Benefits f. Pension Benefit Division 2. ESTATE PLANNING to include: <ol style="list-style-type: none"> a. Will requirements do's and dont's b. Role of the executor c. Role of the lawyer d. Problems of specific assets 3. FINANCIAL PLANNING to include: <ol style="list-style-type: none"> a. Life stages b. Tax saving strategies c. Severance packages d. Investment strategies e. Retirement goals f. Managing a secure retirement g. Working with a financial planner 4. PERSONAL RETIREMENT GOALS <ol style="list-style-type: none"> a. Transition stages b. Areas of your life c. Life without work d. Setting Goals e. Life action plan <p>For evaluation purposes the bidder must provide PDF files of the presentation as well as the participants manual in both official languages.</p>	



4.2 Basis of Selection

4.2.1 Mandatory Technical Criteria

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

PART 5 - RESULTING CONTRACT CLAUSES

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

5.1 Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex "A"

5.1.1 Task Authorization

The Work or a portion of the Work to be performed under the Contract will be on an "as and when requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract.

5.1.1.1 Task Authorization Process

1. The Project Authority will provide the Contractor with a description of the task using the "Task Authorization" form specified in Annex C.
2. The Task Authorization (TA) will contain the details of the activities to be performed, a description of the deliverables, and a schedule indicating completion dates for the major activities or submission dates for the deliverables. The TA will also include the applicable basis(bases) and methods of payment as specified in the Contract.
3. The Contractor must provide the Project Authority, within Five (5) calendar days of its receipt, the proposed total estimated cost for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract.
4. The Contractor must not commence work until a TA authorized by the Project Authority has been received by the Contractor. The Contractor acknowledges that any work performed before a TA has been received will be done at the Contractor's own risk.

5.1.2.2 Task Authorization Limit

The Project Authority may authorize individual task authorizations up to a limit of \$TBD, Applicable Taxes included, inclusive of any revisions.

Any task authorization to be issued in excess of that limit must be authorized by the Contracting Authority before issuance.

5.1.2.3 Minimum Work Guarantee - All the Work - Task Authorizations

1. In this clause,
"Maximum Contract Value" means the amount specified in the "Limitation of Expenditure" clause set out in the Contract; and
"Minimum Contract Value" means 20%.
2. Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with paragraph 3. In consideration of such obligation, the Contractor agrees to stand in readiness



throughout the Contract period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.

3. In the event that Canada does not request work in the amount of the Minimum Contract Value during the period of the Contract, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.
4. Canada will have no obligation to the Contractor under this clause if Canada terminates the Contract in whole or in part for default.

5.2 Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

5.2.1 General Conditions

[2035 \(2015-07-03\)](#), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

5.3 Security Requirements

There is no security requirement applicable to this Contract.

5.4 Term of Contract

5.4.1 Period of the Contract

The period of the Contract is from date of Contract award to March 31st, 2016, inclusive.

5.4.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to two (2) additional one (1) year periods under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

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

5.5 Authorities

5.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Caleb Wallace
Title: Contracting Advisor
Statistics Canada
Address: 150 Tunney's pasture Driveway

Telephone: 613-882-3151
E-mail address: Macs-Bids@statcan.gc.ca



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

5.5.2 Project Authority (To be completed at contract award)

The Project Authority for the Contract is:

Name: _____
Title: _____
Organization: _____
Address: _____

Telephone: ____-____-_____
Facsimile: ____-____-_____
E-mail address: _____

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

5.5.3 Contractor's Representative (To be completed at contract award)

Name: _____
Title: _____
Company: _____
Address: _____

Telephone: ____-____-_____
Facsimile: ____-____-_____
E-mail address: _____

5.6 Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a Public Service Superannuation Act (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada.

5.7 Payment

5.7.1 Basis of Payment

5.7.2 Basis of Payment – Limitation of Expenditure – Task Authorizations

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work specified in the authorized Task Authorization (TA), as determined in accordance with the Basis of Payment Annex “B” to the limitation of expenditure specified in the authorized TA.

Canada's liability to the Contractor under the authorized TA must not exceed the limitation of expenditure specified in the authorized TA. Customs duties are included and Applicable Taxes are extra.



No increase in the liability of Canada or in the price of the Work specified in the authorized TA resulting from any design changes, modifications or interpretations of the Work will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been authorized, in writing, by the Contracting Authority before their incorporation into the Work.

5.7.3 Method of Payment

H1008C (2008-05-12) Monthly Payment

5.8 Invoicing Instructions

- a. The Contractor must submit invoices in accordance with the information required in the General Conditions.
- b. The Contractor's invoice must include a separate line item for each subparagraph in the Basis of Payment provision, and must show all applicable Task Authorization numbers.
- c. By submitting invoices the Contractor is certifying that the goods and services have been delivered and that all charges are in accordance with the Basis of Payment provision of the Contract, including any charges for work performed by subcontractors.
- d. Invoices must be distributed as follows:
 - i. One (1) copy (paper or electronic) must be forwarded to the address below for certification and payment.

Financial and Administrative Services Division (FASD)

RH Coats Building, Finance Counter (RHC7A)
100 Tunney's Pasture Driveway, Ottawa, ON K1A 0T6
Financecounter@statcan.gc.ca

- ii. One (1) copy (paper or electronic) must be forwarded to the Contracting Authority and the Project Authority identified under the section entitled "Authorities" of the Contract.

5.9 Certifications

5.9.1 Compliance

The continuous compliance with the certifications provided by the Contractor in its bid and the ongoing cooperation in providing additional information are conditions of the Contract. Certifications are subject to verification by Canada during the entire period of the Contract. If the Contractor does not comply with any certification, fails to provide the additional information, or if it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

5.10 Applicable Laws

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

5.11 Priority of Documents

If there is a discrepancy between the wording of any documents that appear on the list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

- (a) The Articles of Agreement;
- (b) [2035 \(2015-07-03\)](#), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.
- (c) Annex A, Statement of Work;



- (d) Annex B, Basis of Payment;
- (e) Annex C, Task Authorization Form
- (f) The Contractor's bid dated _____,

5.12 Insurance

SACC Manual clause [G1005C](#) 2008-05-12 Insurance

5.13 Contract Clauses - Dispute Resolution Services

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1(1) of the Department of Public Works and Government Services Act will, on request, and consent of the parties, to participate in an alternative dispute resolution process to resolve any dispute between the parties respecting the interpretation or application of a term and condition of this contract and their consent to bear the cost of such process, provide to the parties a proposal for an alternative dispute resolution process to resolve their dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at boa.opo@boa.opo.gc.ca.

5.14 Contract Clause - Contract Administration

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1 (1) of the Department of Public Works and Government Services Act will review a complaint filed by [the supplier or the contractor or the name of the entity awarded this contract] respecting administration of this contract if the requirements of Subsection 22.2(1) of the Department of Public Works and Government Services Act and Sections 15 and 16 of the Procurement Ombudsman Regulations have been met, and the interpretation and application of the terms and conditions and the scope of the work of this contract are not in dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at boa.opo@boa.opo.gc.ca.



**ANNEX “A”
STATEMENT OF WORK (SOW)**

SOW.1.0 TITLE

Delivery of retirement planning courses

SOW.2.0 BACKGROUND

Statistic Canada requires a supplier to provide retirement planning training to its employees.

The ever-growing rate of retirements is eventuating in rapid rate and STATCAN needs to offer its employee the tools necessary to prepare and plan for the future. The priority is for employees to make appropriate decision that will lead to a successful transition to retirement. The course on retirement planning will:

- offer guidance any immediate issues with respect to retirement plans;
- provide a planning framework to help in planning long term goals; and
- provide specific information in the key area of lifestyle, pension, financial and estate planning.

SOW.3.0 OBJECTIVES

Statistics Canada’s Employee Development and Wellness Division (EDWD) requires training experts to submit proposals for the design, preparation and delivery of Retirement planning training course.

SOW.4.0 PROJECT REQUIREMENTS

SOW.4.1 Tasks, deliverables, milestones and tentative timeframes

Tasks	Services	Deliverables and acceptance criteria
CONTRACT PERIOD NO. 1 (Contract Award to March 31, 2016)		
1.	Delivery of training (TA required)	
1.1	Delivery of six (6) estimated courses, subject to change (the language of each course will be determined based on demand).	. Delivery of the Retirement Planning course to a group of 18 to 24 participants/session.
CONTRACT PERIOD NO. 2 – Optional Period 1 (April 1, 2016 to March 31, 2017)		
2.	Delivery of training (TA required)	
2.1	Delivery of twelve (12) estimated courses (the language of each course will be determined based on demand).	Delivery of the Retirement Planning course to a group of 18 to 24 participants/session.
CONTRACT PERIOD NO. 3 – Optional Period 2 (April 1, 2017 to March 31, 2018)		
3.	Delivery of training (TA required)	
3.1	Delivery of twelve (12) estimated courses (the language of each course will be determined based on demand).	Delivery of the Retirement Planning course to a group of 18 to 24 participants/session.

SOW.4.2 Method and Source of Acceptance

All deliverables and services rendered under any contract are subject to inspection by the Project Authority. The Project Authority shall have the right to reject any deliverables that are not considered satisfactory, or require their correction before payment will be authorized.

SOW.4.3 Technical, Operational and Organizational Environment

The course will be given in a classroom of 18 to 24 participants that comprises a computer equipped with Microsoft software and is not connected to Statistics Canada’s internal network. The classroom also has a projector as well as flipcharts and markers.



SOW.5.0 OTHER TERMS AND CONDITIONS OF THE SOW

SOW.5.1 Contractor's Obligations

The contractor is responsible for

- having the teaching materials or any other materials relating to this contract translated therefore available in both official languages and that the two versions are of equal quality;
- providing Statistics Canada with all instructional materials (training expert's manual, resources, teaching tools and PowerPoint presentations in the appropriate language) in electronic format at least five (5) working days before the start of the course;
- provide Statistics Canada with appropriate number of participant's manuals/binders five (5) days prior to the start of the course;
- contacting the training administrators to inform them of the required set-up and transmit instructions specific to the course at least 10 working days before the course is scheduled;
- modifications to the course material can be requested by STATCAN following feedback received by participants. Contractor is responsible to modify course material and manuals accordingly at no extra cost;
- during the course delivery, the instructor must follow/utilize the same manual as the one provided to the participants;
- manuals and course material must be kept up-to-date and current. Any required changes are the contractor's responsibility;
- must supply instructors for the course with at least 2 years experience instructing the course.

SOW.5.2 Statistics Canada Obligations

Statistics Canada will be responsible for

- providing rooms and audiovisual equipment for all training sessions;
- setting up the classroom and managing participant registration;
- access to a staff member who will be available to coordinate activities;
- provide other assistance or support.

SOW.5.3 Location of Work, Work Site and Delivery Point

The courses will be delivered on Statistics Canada's premises in Ottawa from 8:30 a.m. to 4:00 p.m. Training instructors must arrive at least 30 minutes before the scheduled start time of the course to be issued a visitor pass and signed in by an employee of Statistics Canada's Employee Development and Wellness Division (EDWD). Statistics Canada will not cover the travel and living costs incurred by the contractor when delivering the sessions.

SOW.5.4 Language of work

All the work must be conducted in both official languages, English and French.

SOW.5.5 Special Requirements

Statistics Canada has the right to cancel or reschedule courses. Statistics Canada must notify the contractor of any changes by e-mail at least 10 business days prior to the first day of the course. There will be no charge to Statistics Canada for course cancellations or reschedules when done under these conditions.

EDWD learning specialists will randomly be sitting in on course offerings for evaluation purposes. Course feedback will be monitored by STATCAN and modifications to the course material can be requested by STATCAN following comments received by participants. Contractor is responsible to modify course material and manuals accordingly at no extra cost.

SOW.6.0 REQUIRED RESOURCES OR TYPES OF ROLES TO BE PERFORMED

Statistics Canada requires the following resources and services:

- Training delivery:
 - delivering the training in accordance with the course Lesson Plan, using appropriate Adult Education techniques;
 - distributing attendance list to participants for their signature;
 - providing any feedback and recommendations to the Project Authority regarding the course.



ANNEX "B"
BASIS OF PAYMENT

1 Basis of Payment

The Bidder must submit firm, all inclusive prices for the services, as described in Annex A - Statement of Work. Prices submitted must be inclusive of all activities, personnel, equipment, and materials to prepare for delivery, customs and duties included, Harmonized Sales Tax excluded. Prices are to be inclusive of shipping costs.

Period	All-inclusive fixed Per course rate (18-24 attendees)	Estimated number of courses	Total estimated price per year
Contract award until March 31 st 2016		6	
OPTION #1: April 1 st , 2016 to March 31 st , 2017		12	
OPTION #2: April 1 st , 2017 to March 31 st , 2018		12	
Evaluated Price (Applicable Taxes excluded):			\$ _____
Estimated Applicable Taxes			\$ _____



ANNEX "C"
TASK AUTHORIZATION FORM

(To be completed at contract award)