



**RETURN BIDS TO:
RETOURNER LES SOUMISSION À:**

aac@international.gc.ca

REQUEST FOR PROPOSAL

Offer to: Foreign Affairs, Trade and
Development Canada

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

DEMANDE DE PROPOSITION

Proposition aux: Affaires étrangères,
Commerce et Développement Canada

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

COMMENTS – COMMENTAIRES:

This document contains a security
requirement – Ce document contient une
exigence de sécurité

TITLE – SUJET Leadership Training for Middle-Managers	
SOLICITATION No. – NO DE L’INVITATION 15-94376	DATE AUGUST 17, 2015
SOLICITATION CLOSES – L’INVITATION PREND FIN On, September 28, 2015 at 14:00 hours Local Time in Ottawa, ON. Le, 28 septembre 2015 à 14:00h heure locale à Ottawa, ON.	
ADDRESS INQUIRIES TO – ADRESSER TOUTES QUESTION A Chantal Lafleur	
TELEPHONE 343-203-1326	EMAIL - COURRIEL Chantal.lafleur@international.gc.ca
DESTINATION OF GOODS/SERVICES – DESTINATION DES BIENS/SERVICES See Herein. Informations dans le document.	
VENDOR/FIRM NAME AND ADDRESS – RAISON SOCIALE ET ADRESSE DU FOURNISSEUR/DE L’ENTREPRENEUR Telephone No. - No de téléphone: Facsimile No. – No de télécopieur:	
NAME AND TITLE OF PERSON AUTHORIZED TO SIGN ON BEHALF OF THE VENDOR/FIRM NOM ET TITRE DE LA PERSONNE AUTORISÉ A SIGNER AU NOM DU FOURNISSEUR/DE L’ENTREPRENEUR	Corporate Seal
_____ Signature	
_____ Date	

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PART 1 - GENERAL INFORMATION

1. Introduction

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

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

The Annexes include the Statement of Work, the Basis of Payment, the Security Requirements Checklist, the Federal Contractors Program for Employment Equity - Certification, the Insurance Requirements, and any other annexes.

2. Summary

The purpose of this RFP is to select a supplier to enter into a contract with the Office of Centre of Learning for International Affairs and Management (CFSD) of the Department of Foreign Affairs, Trade and Development (DFATD) to provide services for the design and delivery of leadership training as described in the Statement of Work – Appendix A attached herein.

The work is to be performed from the contract award date (tentatively set for November 1, 2015) for a period of one (1) year. However, in the event of unusual circumstances, the contract could be awarded at a sooner or later date. There is also the potential of four (4) additional one year option periods under the same terms and conditions.

There is a security requirement associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, bidders should refer to the Canadian Industrial Security Directorate (CISD), Industrial and Security Program of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website”.

The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), and the Agreement on Internal Trade (AIT).

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 of receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone or in person.

PART 2 - BIDDER INSTRUCTIONS

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](#)

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(<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 5.4 of 2003, Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: sixty (60) days

Insert: one hundred and twenty (120) days

2. Submission of Bids

Bids must be submitted only to Foreign Affairs, Trade and Development Canada (DFATD) by the date, time and place indicated on page 1 of the bid solicitation.

Electronic proposals must have separate PDF files attached for each section as detailed in Part 3 – Bid Preparation Instructions. The subject line must be in the following format: Subject Line: Proposal for RFP# **15-94376**. Total email file size cannot exceed 7MB.

Please note: Electronic Proposals must not be copied to any other address or individual. Failure to comply will be grounds for disqualification and the proposal will not be evaluated.

Ensure name, address, Closing Date, and Solicitation Number are clearly identified.

Failure to comply with 2. will be grounds for disqualification and proposal will not be evaluated.

3. Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than eight (8) 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.

4. 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.

5. Improvement of Requirement During Solicitation Period

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Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reason for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority at least eight (8) days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

6. Basis for Canada's Ownership of Intellectual Property

The Department of Foreign Affairs, Trade and Development Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, on the following grounds: (6.5) where the material developed or produced consists of material subject to copyright, with the exception of computer software and all documentation pertaining to that software.

PART 3 - BID PREPARATION INSTRUCTIONS

1. Bid Preparation Instructions

Electronic proposals must be in PDF format and the total email file size cannot exceed 7MB. The subject line must be in the following format: Proposal for RFP #15-94376. Only proposals submitted by email will be accepted. Canada requests that bidders provide a separate PDF file for each Section, and titled as follows:

- Section I: Technical Bid
- Section II: Financial Bid
- Section III: Certifications
- Section IV: Additional Information

Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid. Electronic proposals must not be copied to any other address or individual. Failure to comply will be grounds for disqualification and the proposal may not be evaluated.

Ensure the name of the contracting authority, the closing date and the solicitation number are clearly identified in the body of the email. Failure to comply with the Bid Preparation Instructions will be grounds for disqualification and the proposal may not be evaluated.

Canada requests that bidders 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.

Canada will evaluate only the documentation provided with a bidder's bid. Canada will not evaluate information such as references to Web site addresses where additional information can be found, or technical manuals or brochures not submitted with the bid.

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Bidders are advised that only listing experience without providing any supporting information data such as: curriculum vitae, professional profile, credentials, references and/or reference letters, number of projects completed and in progress, the period of the work performed in number of months and years in past and present employment; and where, when and how such experience was obtained will not be considered to be “demonstrated” for the purpose of this evaluation.

Section II: Financial Bid

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.

Section III: Certifications

Bidders must submit the certifications required under Part 5.

Section IV: Additional Information

In Section IV of their bid, Bidders should provide:

1. their legal name;
2. their Procurement Business Number (PBN);
3. the name of the contact person (provide also this person’s mailing address, phone and facsimile numbers and email address) authorized by the Bidder to enter into communications with Canada with regards to their bid, and any contract that may result from their bid;
4. for Part 2, article 3, Former Public Servant, of the bid solicitation: the required answer to each question; and, if the answer is yes, the required information;
5. for Part 6, article 1, Security Requirement, of the bid solicitation:
 - a) the name of each individual who will require access to classified or protected information, assets or sensitive work sites.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures

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

1.1 Technical Evaluation

1.1.1 Mandatory Technical Criteria

The bid must meet the mandatory technical criteria specified below. The Bidder must provide the necessary documentation to support compliance with this requirement by bid closing.

Bids which fail to meet the mandatory technical criteria will be declared non-responsive. Each mandatory technical criterion should be addressed separately.

Item	Mandatory Criteria	Met / Not Met	Cross Reference to Proposal
M1	Education The proposed resource who will co-design and facilitate the four-day leadership courses for experienced managers and executives, the ten-day leadership Executive Programs and the Heads of Mission courses on Leadership at Mission must have a degree from a recognized university in education sciences, public or business administration, organizational development,		

	psychology, sociology, or social sciences. A photocopy of the diploma MUST be included in the proposal.		
M2	<p>Experience The proposed resource(s) who will co-design and facilitate the courses in the Leadership Program must (each) have an experience of:</p> <p>2.1 - Seventy (70) days (not necessarily consecutive) within the last six (6) years delivering leadership training sessions from the bid closing date of similar size and scope to the requirement in Appendix A, Statement of Work.</p> <ul style="list-style-type: none"> - twenty (20) of the seventy (70) days delivering leadership training to a target audience in the Government of Canada. - twenty (20) of the seventy (70) days delivering leadership training to a target audience of Executives <p>2.2 – Seventy (70) days within the last six (6) years from the bid closing date engaged in process facilitation, at the executive level. Bidders must demonstrate experience working with executives in the design and implementation of leadership and/or organizational development interventions in a group environment of similar scope and relevance to key topics covered in the SOW, including but not limited to, strategic planning and alignment, leading with vision and purpose, building motivation and momentum, change management, communication, decision-making, power and influence, performance management, strategic thinking, working in and managing teams, and personal and organizational resilience.</p> <p>-twenty (20) of the seventy (70) days engaged in process facilitation at the executive level to a target audience in the Government of Canada.</p>		

For M.2 and P.R. 2, Bidders must use the following Table 1 to clearly indicate, for each resource:

Table 1

	Start Date (mm-yy)	End Date (mm-yy)	Number of Delivery Days and Language of Delivery (EN or FR and/or Bilingual)	Profiles of Target Audiences	Training/Process Facilitation Topic(s) (max of 50 words)	Organization
# 1						
# 2						
# 3						
# 4						
# 5						

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Item	Mandatory Criteria	Met / Not Met	Cross Reference to Proposal
M3	<p>Language Bidders MUST demonstrate that they are able to offer services to DFATD in English and French. To fully comply with this mandatory requirement, Bidders must demonstrate in their response to Mandatory Criterion #2 (refer to above) that they are in compliance with either of the following scenarios:</p> <p style="padding-left: 40px;">a. that at least one (1) of their proposed (and qualified) Instructor resources is capable of delivering services bilingually (i.e. in both English and French).</p> <p>Note: DFATD will consider a resource as being <i>bilingual</i> only if that resource is capable of reading, writing and oral interaction in both languages together with the capability of delivery of a course to DFATD employees in either official language.</p> <p style="padding-left: 40px;">b. that at least one (1) of their proposed (and qualified) Instructor resources is capable of delivering services in English, AND at least one (1) of their proposed (and qualified) Instructor resources is capable of delivery services in French.</p>		

1.1.2 Point Rated Technical Criteria - Maximum: 190 points

Proposals having successfully met ALL of the mandatory criteria will be evaluated against each of the following point-rated criteria.

Proposals should identify the qualifications and experience of the firm and the proposed resource personnel to carry out the tasks by systematically addressing each of the requirements as detailed below.

Proposals should provide supporting information in number of years/projects consisting of detailed resume(s) that clearly describe the degree and nature of the knowledge/experience possessed by each proposed resource personnel including that of the firm. Supporting information should include the previous experience with respect to the factors listed below. Up to the number of points specified below will be awarded for each factor based on length and depth of experience. The points will then be totaled.

Proposals will be evaluated and point-rated against the criteria listed below, using the evaluation factors and weighing indicators indicated.

Bidders must receive at a minimum a total technical score of 70 percent (%) for the point-rated criteria PR1 to PR 4 to qualify to be called for an oral presentation (PR 5).

Any bid which fails to obtain the minimum total point-rated score of 70% will be declared non-compliant. Each point-rated technical criterion should be addressed separately.

Note: DFATD reserves the right to waive PR5 if only one bidder's overall score for PR1-PR4 is greater or equal to 70%.

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Summary of Point Rated Criteria

Number	Criteria	Maximum available points	Minimum Required
PR 1	Summary of projects	50	--
PR 2	Experience of the Bidder	50	--
PR 3	Coaching	30	--
PR 4	Experience as an Executive	10	--
Total PR1 – PR4		140	98 (70%)
PR 5	Facilitation of a training module (invitation will only be issued if the bidder's overall score for PR1-PR4 is greater or equal to 98)	50	35 (70%)
Total PR1-PR5		190	133 (70%)

PR1 - Project Summaries (50 points)

Bidders should provide a written summary of one (1) project related to leadership/management training that focusses on leadership issues. The project should be at the executive level (Ex-01 and above). The project will have been listed under the mandatory criteria (M2).

Bidders should also provide a written summary of one (1) project related to process facilitation at the executive level. Bidders should demonstrate experience working with executives in the design and implementation of leadership and/or organizational development interventions in a group environment. The project will have been listed under the mandatory criteria (M2).

The project summaries should be ones in which the Bidder's proposed resource was actively engaged in the design and delivery of a leadership training initiative or process facilitation intervention that are similar in scope and relevance to key topics covered in the SOW : e.g. strategic planning and alignment, leading with vision and purpose, building motivation and momentum, communication, feedback, decision-making, power and influence, performance management, strategic thinking, working in and managing teams, and personal and organizational resilience.

For each project, the Bidder should provide a detailed project summary in the format below:

Table 2

Project Name:	Customer/Client Organization:
Start date (mm-yy):	End date (mm-yy):
Summary Description of Leadership Training or Process facilitation Intervention (including objectives, challenges):	

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Purpose of Leadership Training or Intervention:	Description of Learners:
Number of Deliveries:	Number of Participants:
Description of Learning Approach, Methodology (including adult learning techniques and coaching used):	Self-assessment tools and instruments used (if applicable)
Customer/Client Reference: Name: Title: Telephone number: Email address:	

*DFATD reserves the right to contact the client project authorities to validate the information provided by Bidders.

*Each written project summary should be a max of three (3) pages (seven hundred and fifty (750) words) in length.

(a) The project summaries will be evaluated according to the following criteria:

Excellent (40-50 points)

Project provided demonstrates clearly high level of similarity/relevance to the SOW requirements (clientele/topics/ design/customization delivery/context).

Good (30-39 points)

Project clearly demonstrates a good evidence of similarity to the SOW requirements (clientele/topics/ design/customization delivery/context)

Satisfactory (20-29 points)

Project provided some evidence of similarity/relevance to the SOW requirements (clientele/topics/ design/customization delivery/context).

Limited (10-19 points)

Project provided limited evidence of similarity/relevance to the SOW requirements (clientele/topics/ design/customization delivery/context).

Minimal (0-9 points)

Project provided very little or no evidence of similarity/relevance to the SOW requirements (clientele/topics/ design/customization delivery/context).

PR 2 – Experience in Leadership Training and Process Facilitation (50 points)

Up to fifty (50) points will be awarded based on the Bidder's project experiences (Table 1). DFATD will evaluate and rate the breadth and depth of experience providing leadership training and design and process facilitation interventions that focus on leadership issues that are similar in scope and relevance to key topics covered in the SOW, beyond the mandatory minimum seventy (70) days of training and process facilitation. Points will be awarded as follows:

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Leadership Training	Process Facilitation in Leadership or Organizational Development in a Group Environment
(21-25 points) <ul style="list-style-type: none"> Information provided clearly demonstrates an in-depth expertise (more than one hundred and fifty (150 +) days in leadership training) 	(21-25 points) <ul style="list-style-type: none"> Information provided clearly demonstrates an in-depth expertise (more than one hundred and fifty (150 +) days in process facilitation)
(16-20 points) <ul style="list-style-type: none"> Information provided clearly demonstrates a good expertise (between 131 and 149 days in leadership training) 	(16-20 points) <ul style="list-style-type: none"> Information provided clearly demonstrates a good expertise (between 131 and 149 days in process facilitation)
(11-15 points) <ul style="list-style-type: none"> Information provided demonstrates experience (between 111 and 130 days in leadership training) 	(11-15 points) <ul style="list-style-type: none"> Information provided demonstrates experience (between 111 and 130 days in process facilitation)
(6-10 points) <ul style="list-style-type: none"> Information provided demonstrates some limited experience (between 91 and 110 days in leadership training) 	(6-10 points) <ul style="list-style-type: none"> Information provided demonstrates some limited experience (between 91 and 110 days in process facilitation)
(0-9 points) <ul style="list-style-type: none"> Information provided does not meet the criteria or demonstrates minimal experience (between 71 and 90 days in leadership training) 	(0-9 points) <ul style="list-style-type: none"> Information provided does not meet the criteria or demonstrates minimal experience (between 71 and 90 days in process facilitation)

PR3 Executive Coaching (30 points)

Bidders should provide written summaries of distinct executive coaching experiences related to leadership/management issues in the past three years in the format below:

The summaries should be ones in which the Bidder’s proposed resource was actively engaged in the coaching of executives on leadership/management issues.

Table 3 – Coaching experience

Start Date (mm-yy)	End Date (mm-yy)	Client Organization/Client Level	Description (max 50 words)	Total # of Coaching Days

Up to thirty (30) points will be awarded based on the Bidder’s summaries (Table 3). DFATD will evaluate and rate the breadth and depth of experience providing executive coaching on leadership/management issues:

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Excellent (22-30 points)

Information provided clearly demonstrates an in-depth expertise--certified executive coach and more than fifteen (15 +) interventions in executive coaching on leadership/management issues within the last three years

Good (10-21 points)

Information provided clearly demonstrates a good expertise--experience in executive coaching and more than eleven (11 +) interventions in executive coaching on leadership/management issues within the last three years

Minimal (0-9 points)

Information provided demonstrates minimal experience in executive coaching and less than ten (10) interventions in executive coaching on leadership/management issues within the last three years

PR 4 – Experience at the Executive Level

Bidder's proposed instructor resources(s) who have worked in positions of senior management at the Executive level as demonstrated in their curriculum vitae will be awarded a maximum of ten (10) points.

PR5- Oral Presentation (50 points)

Bidders attaining a minimum point-rated score of 70% or more overall on Point-Rated Criteria **PR 1** to **PR 4**, will be invited to have their proposed Instructor(s) to facilitate a 30 min session to an internal DFATD audience on a subject related to these courses e.g. how they would teach David Kantor's "Four Player Model" as part of a leadership course for managers OR executives. This will be done at DFATD premises in Ottawa, Ontario. DFATD will notify the Bidder of the date/time for the facilitation, at least 72 hours prior to the assigned presentation timeslot. Facilitation will take place in either official language, as determined by DFATD personnel.

Up to ten (10) points will be awarded for demonstration of each of the following factors:

- a) Clarity and confidence explaining the leadership model(s);
- b) Accurate use of leadership terminology;
- c) Quality of oral communication skills;
- d) Evidence of applied andragogy (adult learning) principles; and
- e) Ability to motivate the audience and establish a sense of importance and relevance for the subject;

The following rating scale will be used to evaluate each factor:

Excellent = 9-10 points/factor
Satisfactory = 6-8 points/factor
Minimal = 3-5 points/factor
Poor = 1-2 points/factor
Non-existent = 0 point/factor

For a total of 50 points for each resource

2. Basis of Selection

Highest Combined Rating of Technical Merit 60 % and Price 40 %

To be declared responsive, a bid must:

- (a) comply with all the requirements of the bid solicitation; and

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- (b) meet all the mandatory evaluation criteria; and
- (c) obtain the required minimum total of **70 percent for the** rated criteria.

Bids not meeting (a) or (b) or (c) will be declared non-responsive for the applicable resource.

The combined rating of technical merit and price for a resource will be determined by adding together the points for pricing and for technical merit for the resource.

The responsive bid for a resource with the highest combined rating of technical merit and price will be recommended for award of a contract for the applicable resource.

[The table below illustrates an example where the selection of the contractor is determined by a 60/40 ratio of the technical merit and price, respectively.] The total number of points that can be granted is 135, and the lowest evaluated price is \$45,000.00 (45).

Basis of Selection - Highest Combined Rating Technical Merit (60%) and Price (40%)

		Bidder 1	Bidder 2	Bidder 3
Overall Technical Score		115/135	89/135	92/135
Bid Evaluated Price		\$55,000.00	\$50,000.00	\$45,000.00
Calculations	Technical Merit Score	$115/135 \times 60 = 51.11$	$89/135 \times 60 = 39.56$	$92/135 \times 60 = 40.89$
	Pricing Score	$45/55 \times 40 = 32.73$	$45/50 \times 40 = 36$	$45/45 \times 40 = 40$
Combined Rating		83.84	75.56	80.89
Overall Rating		1st	3rd	2nd

* the lowest evaluated price (bidder C in this example)

** the respective bidders own bid price

*** the maximum price points available

PART 5 - CERTIFICATIONS

Bidders must provide the required certifications and associated information to be awarded a contract.

The certifications provided by bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default in carrying out any of its obligations under the Contract, if any certification made by the Bidder is found to be

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untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority may render the bid non-responsive or constitute a default under the Contract.

1. Certifications Required Precedent to Contract Award

1.1 Integrity Provisions - Associated Information

By submitting a bid, the Bidder certifies that the Bidder and its Affiliates are in compliance with the provisions as stated in Section 01 Integrity Provisions - Bid of [2003](#). (2015-07-03) Standard Instructions - Goods or Services - Competitive Requirements The associated information required within the Integrity Provisions will assist Canada in confirming that the certifications are true.

1.2 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) available from [Employment and Social Development Canada \(ESDC\) - 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.

2. Additional Certifications Required Precedent to Contract Award

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 Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to comply with the request of the Contracting Authority and to provide the certifications within the time frame provided will render the bid non-responsive.

2.1 Status and Availability of Resources

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

If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

2.2 Education and Experience

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements,

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experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

2.3 Former Public Servant – Competitive Requirements

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 the PSSA. It does not include pensions payable pursuant to the [Canadian Forces Superannuation Act](#), R.S., 1985, c. C-17, the [Defence Services Pension Continuation Act](#), 1970, c. D-3, the [Royal Canadian Mounted Police Pension Continuation Act](#), 1970, c. R-10, and the [Royal Canadian Mounted Police Superannuation Act](#), R.S., 1985, c. R-11, the [Members](#), 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

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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.

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.

Name of Authorized Individual Date Signature

PART 6 - SECURITY AND INSURANCE REQUIREMENTS

1. Security Requirement

At the date of bid closing, the following conditions must be met:

- (a) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
- (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in Part 7 - Resulting Contract Clauses;
- (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;

For additional information on security requirements, bidders should refer to the [Canadian Industrial Security Directorate \(CISD\), Industrial Security Program](http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html) of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.

2. Insurance Requirements

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.

PART 7 - RESULTING CONTRACT CLAUSES

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

1. Statement of Work

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

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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.

2.1 General Conditions

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

2.2 Supplemental General Conditions

4007 (2010-08-16), Canada to Own Intellectual Property Rights in Foreground Information, apply to and form part of the Contract.

3. Security Requirement

The Offeror must, at all times during the performance of the Contract hold a valid Facility Security Clearance at the level of **RELIABILITY STATUS**, issued by the Industrial Security Program (ISP), Public Works and Government Services Canada (PWGSC).

The Offeror personnel requiring access to sensitive work site(s) must EACH hold a valid personnel security screening at the level of **SECRET and/or RELIABILITY STATUS**.

Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of DFATD.

The Offeror must comply with the provisions of the:

- a) Security Requirements Check List and security guide (if applicable), attached at Annex C;
- b) Industrial Security Manual (Latest Edition).

4. Term of Contract - Period of the Contract

The period of the Contract is from _____ to _____ inclusive. **[To be entered at contract award]**

4.1 Option to Extend the Contract

The Offeror grants to Canada the irrevocable option to extend the term of the Contract by up to four (4) additional one year periods under the same conditions. The Offeror 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 Offeror at least ten (10) calendar days before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

5. Authorities

5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Chantal Lafleur
Title: Contracting Officer
Foreign Affairs, Trade and Development Canada
Address: 125 Sussex Drive, Ottawa, Ontario K1A 0G2
Telephone: 343-203-1326
E-mail address: chantal.lafleur@international.gc.ca

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

5.2 Project Authority

[To be entered at contract award]

The Project Authority for the Contract is:

Name: _____
 Title: _____
 Organization: _____
 Address: _____
 Telephone: ____-____-_____
 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.

5.3 Contractor's Representative

[To be entered at contract award]

Name: _____
 Title: _____
 Telephone: ____-____-_____
 E-mail address: _____

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.

7. Payment

7.1 Basis of Payment

The Offeror will be reimbursed for the costs reasonably and properly incurred in the performance of the Work, as determined in accordance with the Basis of Payment in Annex B.

7.2 Limitation of Expenditure

Canada's total liability to the Contractor under the Contract must not exceed \$ [To be entered at contract award]. Customs duties are included and Applicable Taxes are extra.

No increase in the total liability of Canada or in the price of the Work 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 approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:

- a. when it is 75 percent committed, or
- b. four (4) months before the contract expiry date, or
- c. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work, whichever comes first.

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If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

7.3 SACC Manual Clauses

A9117C (2007-11-30), T1204 Direct Request by Customer Department
C0711C (2008-05-12), Time Verification

8. Invoicing Instructions

The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.

Each invoice must be supported by:

- a. a copy of time sheets to support the time claimed;
- b. a copy of the release document and any other documents as specified in the Contract;
- c. a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
- d. a copy of the monthly progress report.

Invoices must be distributed as follows:

- a. The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.
- b. One (1) copy must be forwarded to the Project Authority identified under the section entitled "Authorities" of the Contract.

9. Certifications - Compliance

The continuous compliance with the certifications provided by the Contractor in its bid and the ongoing cooperation in providing associated 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 associated 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.

10. Applicable Laws

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

11. Non-Disclosure Agreement

The Contractor must obtain from its employee(s) or subcontractor(s) the completed and signed non-disclosure agreement, attached at Annex D, and provide it to the Project Authority before they are given access to information by or on behalf of Canada in connection with the Work.

12. 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) the supplemental general conditions 2003 (2015-07-03), Standard Instructions – Goods or Services – Competitive Requirements;

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- (c) the supplemental general conditions 4007 (2010-08-16), Canada to Own Intellectual Property Rights in Foreground Information;
- (d) the general conditions 2035 (2015-07-03) Higher Complexity Services;;
- (e) Annex A, Statement of Work;
- (f) Annex B, Basis of Payment;
- (g) Annex C, Security Requirements Check List;
- (h) the Contractor's bid dated _____ **[To be entered at contract award]**.

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ANNEX “A” - STATEMENT OF WORK

A1. TITLE

“Leadership the DFATD Way --for Experienced Managers and Executives”

A2. OBJECTIVES

Foreign Affairs, Trade and Development Canada (DFATD) requires services for the design and delivery of leadership training:

- Up to four (4) offerings of a four (4) day on-site course entitled *Leadership the DFATD Way --for Executives*
- Up to five (5) offerings of a four (4) day on-site course entitled *Leadership the DFATD Way--for Experienced Managers* (supervisor and deputy director levels)
- To be determined up to three (3) deliveries of a ten (10) day on-site course entitled *Executives Perspectives Program* offered in four phases over a period of six to nine months
- To be determined up to two (2) deliveries of a three (3) day on-site course in leadership for Heads of Mission (HOMs).

These services will include:

- a) Co-design of leadership training that is customized to the particular context and needs of DFATD managers and executives;
- b) Course facilitation in French and English;
- c) Course revisions/ adjustments as requested by the Project Authority and in response to participant evaluations; and as needed to be current with industry standards;
- d) Coaching of participants prior to the training and post-training.

A3. BACKGROUND

Foreign Affairs, Trade and Development Canada (DFATD) is a Government of Canada department with approximately 10,000 employees. About half of the employees work in over 170 missions outside of Canada. The Department’s activities require specialized skills and expertise that largely must be developed and fostered internally.

The Canadian Foreign Service Institute (CFSI) offers high calibre and timely courses, programs and services in the areas of international affairs and corporate accountability to DFATD personnel. It has established a leadership program targeted to managers at the supervisor, deputy-director, and executive levels. The CFSI Leadership Program aims at developing and maximizing the leadership skills necessary to thrive in the Department’s current leadership context and to prepare managers for new and future responsibilities in a global, rotational and intercultural work environment.

In the *Leadership the DFATD Way --for Experienced Managers*, DFATD case-studies are interwoven throughout the design and topics include: leadership at DFATD, communication, feedback, decision-making, performance management, change management, working in and managing teams, and personal and organizational resilience. In the *Leadership the DFATD Way--for Executives*, DFATD case-studies are interwoven throughout the design and topics include: leadership at DFATD, leading with vision and purpose, building motivation and momentum, communication, feedback, decision-making, power and influence, performance management, change management, strategic thinking, working in and managing teams, and personal and organizational resilience.

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In the Executive Perspectives Program, topics covered are similar to those in the four-day Leadership course for executives. In addition, relevant DFATD projects are assigned to learners by the Department's senior executives. Group and individual coaching are offered throughout the program, as groups work together on the projects assigned in between the four phases. The design of the three-day course offered to the Heads of Mission will draw on key leadership models and include case-studies that are mission-specific.

A4. SCOPE

CFSD has developed most of the new curriculum for the Leadership Program at DFATD. Three critical principles guide the design of the program and its courses. These three principles are:

- 1) Take responsibility (e.g. how can you tell if you, or others are taking responsibility for your actions?)
- 2) Make decisions (e.g. how do you know when a decision is a decision?)
- 3) Manage the tensions (e.g. how do you hold, manage and resolve tension?)

These principles support the development of insightful and compassionate leaders. The Leadership Program at DFATD is a progressive, cumulative and reliable development path that builds resilient, competent and graceful leaders across the department.

In consultation with the Project Authority, the Contractor shall contribute to the program design, update as needed to keep it current with industry standards regarding leadership competencies and within the context of DFATD.

Should the Project Authority request adjustments to the course in response to participant feedback, the Contractor will implement the requested revisions.

The contractor will allow departmental experts (e.g. Learning Advisors and Course Evaluators) and/or other subject-matter expert(s) to be present in the classroom during the course delivery in order for them to evaluate the course content and methodology and/or provide participants with additional information, if applicable.

Business Volume and Scheduling:

- a) The Contractor will facilitate/deliver the courses, in English, French or bilingually, to cohorts of between 12 and 20 participants. The groups of learners will be largely composed of rotational officers from all streams (i.e. Commercial /Economic, Political/Economic, Development and Management and Consular officers).
- b) The Contractor will facilitate up to :
 - 1) Up to four (4) offerings of a four (4) day on-site course entitled *Leadership the DFATD Way-- for Executives*
 - 2) Up to five (5) offerings of a four (4) day on-site course entitled *Leadership the DFATD Way-- for Experienced Managers* (supervisor and deputy director levels)
 - 3) (TBD) Up to three (3) deliveries of a ten (10) day on-site course entitled *The Executive Perspectives Program* offered in four phases over a period of six to nine months.
 - 4) (TBD) Up to two (2) offerings of a three (3) day on-site course for Heads of Mission (HOMs).
- c) The Project Authority will communicate to the Contractor, in advance, the particulars of each cohort including the dates, language of delivery, and number of participants.
- d) As per the Contract, the Department has the option to extend the term of the Contract by up to four additional one year periods.
- e) During the initial contract period it is expected that up to fourteen (14) courses will be scheduled. Should one or more of the option years be exercised, the Contractor will

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deliver the course to 1 to 14 cohorts in any given option year. Should all options be exercised, it is estimated the Contractor will deliver fifty six (56) courses in total for the option years. The exercise of option years in addition to the contracted first year of the contract will be formalized through contract amendments extending the duration and increasing the financial commitment of the initial contract.

- f) Delivery of the courses are expected between the months of *October (2015) through June (2016)*. Specific dates for all courses will be confirmed with the contractor upon contract award.
- g) Session dates are subject to change with a minimum of 7 days' notice:
 - 1) The Courses will be scheduled during normal working hours (i.e. 09:00 to 17:00) with allocation for breaks, lunch and personal administration. Any changes to established schedules require prior approval of the Project Authority.
- h) The Department may cancel or reschedule a course delivery without a fee. The Department endeavours to provide five working days' notice of any cancellation or reschedule.
- i) Each of the four-day course offerings will include 1.5 hours in individual follow-up coaching which will be optional for the participants.
- j) Each of the ten-day course offerings will include up to 1.5 days of group coaching and up to three (3) days of individual executive leadership coaching over a period of six to nine months.

A5. DELIVERABLES

The following items constitute the deliverables:

- a) Each course delivery
- b) Each updated version of the course material and or PowerPoint presentation (one document in English, one in French, for each delivery) and a one-page report summarizing the updates
- c) Each lesson plan in English and in French
- d) Each 48h debriefing report (emailed to Project Authority within 48 hours post-training)

A6. DESCRIPTION OF SERVICES TO BE PROVIDED

A6.1. Design

- a) In consultation with the Project Authority, the Contractor will design and/or update the course material before each course delivery.
- b) The leadership courses must focus on improving leadership skills to prepare current leaders to assume new and increasingly challenging responsibilities within DFATD.
- c) The course content must be linked to the public service priorities, departmental priorities, the current key leadership competencies (<http://www.tbs-sct.gc.ca/tal/kcl/intro-eng.asp>) and the new key leadership competencies.
- d) The course content must be informed by management of human resources in the federal public service and is aligned with the Values and Ethics Code for the Public Service.
- e) The courses must incorporate a variety of learning activities and tools: case studies, simulations, experiential learning, multimedia resources, social media, etc.
- f) The courses will be aligned with the training approach and methodology determined by the Project authority, and use models and tools that have been approved by the Project Authority.
- g) The course and associated materials must be provided in both French and English to the standard described in A9 LANGUAGE REQUIREMENT.
- h) The Project Authority will collect course feedback from participants through a formal confidential evaluation process, and share the outcomes of the evaluation with the Contractor. If need be, the Project Authority will discuss with the Contractor the need

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for further tailoring/customization to better meet the work context of DFATD participants.

- i) The Contractor will provide a one-page report to the Project Authority each time the course material is updated.

A6.2. Delivery

- a) The Contractor will facilitate up to nine (9) four-day classroom courses, customized to the context and needs of the Department's managers and executives.
- b) The Contractor will deliver two (2) customized courses as part of the nine 4-day courses that meet the specific needs and requirements of managers and executives at DFATD. The two customized courses are:
 - 1) *Leadership at DFATD for New Executives*
 - 2) *Leadership at Mission for Management and Consular Officers*
- c) TBD, up to three (3) 10-day courses, the Executives Perspectives Program, with individual and group coaching throughout.
- d) TBD, up to two (2) offerings of three (3)-day courses in leadership for Heads of Mission.
- e) The Contractor must provide the course material electronically in both official languages to the Project Authority at least 5 working days before each delivery, and conform to the specifications listed in A8 COURSE MATERIAL.
- f) The Contractor will provide a 48h debriefing report following each course offering. The Project Authority will provide the report template.

A6.3. Coaching

- a) The four day course for Managers and the four day course for Executives include optional follow-up individual coaching sessions of up to 1.5 hours per participant. We expect up to 20 participants per course delivery.
- b) The 10 day Executive Perspective Course also includes optional individual executive coaching of up to 3 hours per participant. Participants will also have access to a coach during the group work that is expected to be completed as part of a project. Four groups of 5 participants will be formed. Each group has up to 2 hours of coaching.

A7. ROLES AND RESPONSIBILITIES

A7.1. Contractor's Responsibilities

- a) To provide the deliverables and services indicated in this Statement of Work.
- b) To ensure a consistent high quality of course facilitation and delivery – as evaluated by the Project Authority and agreed upon prior to contract.
- c) To ensure a consistent high quality of the translation of any course documents and language of instruction in keeping with standard federal government terminology.
- d) To prepare and/or update the course material (in MS Word format).
- e) To review the verbal interviews (informal 360 self-assessment) that participants obtain and will share in writing with the facilitator prior to each course delivery.
- f) To communicate to the Project Authority any suggestions for improvements and changes to the design and/or facilitation of the course in order to keep current with industry standards, and obtain the Project Authority's agreement to deliver the updated course to DFATD participants.
- g) To arrive at the training location at least 45 minutes before the class starts.
- h) To ask participants to fill out the attendance list for each half-day of the course.
- i) While interacting with course participants, the Contractor will represent CFSI and not his/her company.

A7.2. Responsibilities of DFATD

For the course delivery:

- a) To act as a conduit between the Contractor and all program participants.
- b) To share and explain to the Contractor the key elements that must define the design of the course.

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- c) To task the Contractor with revisions to the course and accompanying materials in response to participant evaluations and/or evolving context and standards.
- d) To work in collaboration with the Contractor to establish a definitive calendar. Specific dates will be determined once the contract has been awarded.
- e) To inform the Contractor of the language of delivery of upcoming sessions.
- f) To prepare a list of participants for the Contractor to keep track of attendance each half-day of the course.
- g) To ensure that an appropriate room and technical equipment are booked for the dates of the training.
- h) In case of cancellation of the training, to inform the Contractor at least 5 working days before the beginning of the training.

A8. COURSE MATERIAL

- a) The course material will be aligned with the training approach and methodology recommended by the Project authority.
- b) The course contents will be designed in consultation with the Project authority.
- c) The Contractor will send the course material by email to the Project Authority at least 5 working days before each course delivery.
- d) The Contractor may **not** insert her/his name, corporate identifier or company logo on any course material, including the PowerPoint.
- e) The course material will consist of two MS Word documents (2007+), one in French, one in English. Each document will use:
 1. Heading styles (required for screen readers and to generate a table of contents)
 2. "Normal" text in font Calibri 11 or Arial 10, or equivalent
 3. "Normal" text in black to ensure better contrast
 4. Page numbers on all pages except for the cover page
 5. A dynamic table of contents (including text formatted as Heading 1 to Heading 3)
 6. Appropriate list styles (bulleted or numbered)
 7. Captions for all images and diagrams
 8. Active hyperlinks for all URLs
 9. **Bold or italic** text to display emphasis (underlined text is only for hyperlinks)
 10. A file not exceeding 2 Megabytes in size (one for the French version, one for the English version)
- f) The Project Authority will provide DFATD identifiers for the Contractor to use in the preparation of the course material.

A9. LANGUAGE REQUIREMENT

- a) Courses and course material must be offered in English and French.
- b) Some courses will be requested in English, some in French and some in a bilingual format. Oral and written language proficiency at Level 4+ is required.*

* Advanced Professional Proficiency, plus (4+):

Speaking: Speaking proficiency is regularly superior in all respects and is usually equivalent to that of a well-educated, highly articulate native speaker. Speaks effortlessly and smoothly on all topics. Understands all forms and styles of speech and shows strong sensitivity to social and cultural references. Language usage and ability to function are fully successful. There may be an occasional non-native slip.

Writing: Able to write the language precisely and accurately in a wide variety of prose styles pertinent to a variety of audiences and professional needs. Varied use of stylistic devices and flexibility within a style. Can both write and edit formal and informal correspondence, official

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reports and documents, and professional articles, including writing for special purposes which might include legal, technical, educational, literary and colloquial writing. The writer employs a very wide range of stylistic devices.

http://www.international.gc.ca/ifait-iaeci/test_levels-niveaux.aspx?lang=eng

A10. MEETINGS

- Communication with the Project Authority would mostly be via email and telephone, but occasionally face to face at CFSI's offices in Gatineau.
- CFSI will prepare a one-day workshop on course design and methodology for the contractor upon contract award.
- TBD the contractor will observe the pilot of *Leadership the DFATD Way --for Executives* in October 2015.

A11. TRAVEL

There will be no reimbursement of travel incurred by the Contractor in the performance of the contracted services.

A12. TERM OF CONTRACT

Initial Contract and Plan for Options

- Up to five (5) cohorts for *Leadership the DFATD Way --for Experienced Managers*
- Up to four (4) cohorts for *Leadership the DFATD Way -- for Executives*
- TBD, up to three (3) cohorts for *The Executives Perspectives Program*
- TBD, up to two (2) cohorts for the course for Heads of Mission are planned for June 2016
- DFATD reserves the option to extend the contract for up to four (4) additional one year periods, as indicated in the Contract. The extensions will be enacted via formal contract amendments.

A13. COURSE DELIVERY DATES

- a) Course delivery dates will be detailed once the contract is signed. The Project Authority and the Contractor will agree on dates, language of delivery and other particulars as the case may be.

A14. LOCATION OF WORK

The course will be delivered at a DFATD building in the National Capital Region (Ottawa-Gatineau). Meetings with the Project Authority will take place at a DFATD building in the NCR or virtually.

A15. NUMBER OF PARTICIPANTS PER COURSE/PROGRAM

The number of participants per course delivery will be a minimum of 12 and up to a maximum of 20.

A16. CONSTRAINTS

Training sessions will be given on consecutive week days during normal office hours, excluding statutory holidays.

A17. COPYRIGHT

DFATD reserves the right to film and/or record any training session conducted under this contract and to use written materials and/or recorded material for further educational training purposes for its employees.

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ANNEX "B" - BASIS OF PAYMENT

- 1.1 The Offeror must complete this pricing schedule and include it in its financial proposal. **Pricing must only be contained in the financial proposal.** A price breakdown must be provided for the firm all inclusive rates.
- 1.2 Offerors shall quote in Canadian dollar (CAD), firm prices/rates as indicated in the tables below that include all costs necessary to perform the work. GST, HST or VAT must be indicated separately, as applicable. Failure to provide pricing for an item will render the bid non-responsive.
- 1.3 The prices given below for the services will remain in force for the entire duration of the contract including the four (4) extension periods of one year if they are exercised.
- 1.4 The volumetric (estimated usage) data is provided in good faith and does not represent a commitment on the part of Canada. Canada's actual usage may be higher or lower.

SECTION 1: INITIAL CONTRACT PERIOD ONE (12 MONTHS)

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

PRICING SCHEDULE 1 – INITIAL CONTRACT PERIOD					
	Category	Resource Name	Firm All-Inclusive Hourly rate	Estimated No. of Hours	Sub Total (in CAD)
			A	B	C = A x B
1	Course Design – 4 day leadership for managers		CAD_____	Up to 75	CAD _____
2	Course Delivery – 4 day leadership for managers (Up to 5 sessions)		CAD_____	Up to 150	CAD _____
3	Coaching – 4 day leadership for managers (Up to 5 sessions)		CAD_____	Up to 150	CAD _____
4	Course Design – 4 day leadership for executives.		CAD_____	Up to 60	CAD_____
5	Course Delivery – 4 day leadership for executives (Up to 4 sessions)		CAD_____	Up to 120	CAD_____
6	Coaching – 4 day leadership for executives (Up to		CAD_____	Up to 120	CAD_____

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	4 sessions)				
7	Course Design – 10 day leadership for executives		CAD_____	Up to 150	CAD_____
8	Course Delivery – 10 day leadership for executives (Up to 3 sessions)		CAD_____	Up to 225	CAD_____
9	Coaching – 10 day leadership for executives (up to 3 sessions)		CAD_____	Up to 213.75	CAD_____
10	Course Design – 3 day course for HOMs		CAD_____	Up to 22.5	CAD_____
11	Course Delivery – 3 day course for HOMs (Up to 2 sessions)		CAD_____	Up to 45	CAD_____
Pricing Schedule 1 Total (TAX excluded):					CAD_____

PRICING SCHEDULE 2: OPTION PERIOD ONE (12 MONTHS)

This section is only applicable if the option to extend the Standing Offer is exercised by Canada.

During the extended period of the Standing Offer specified below, the Offeror will be paid as specified below to perform all the Work in relation to the Standing Offer extension.

PRICING SCHEDULE 2 – OPTION PERIOD ONE					
	Category	Resource Name	Firm All-Inclusive Hourly rate	Estimated No. of Hours	Sub Total (in CAD)
			A	B	C = A x B
1	Course Design – 4 day leadership for managers		CAD_____	Up to 75	CAD _____
2	Course Delivery – 4 day leadership for managers (Up to 5 sessions)		CAD_____	Up to 150	CAD _____
3	Coaching – 4 day leadership for		CAD_____	Up to 150	CAD _____

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	managers (Up to 5 sessions)				
4	Course Design – 4 day leadership for executives.		CAD_____	Up to 60	CAD_____
5	Course Delivery – 4 day leadership for executives (Up to 4 sessions)		CAD_____	Up to 120	CAD_____
6	Coaching – 4 day leadership for executives (Up to 4 sessions)		CAD_____	Up to 120	CAD_____
7	Course Design – 10 day leadership for executives		CAD_____	Up to 112.5	CAD_____
8	Course Delivery – 10 day leadership for executives (Up to 3 sessions)		CAD_____	Up to 225	CAD_____
9	Coaching – 10 day leadership for executives (up to 3 sessions)		CAD_____	Up to 213.75	CAD_____
10	Course Design – 3 day course for HOMs		CAD_____	Up to 22.5	CAD_____
11	Course Delivery – 3 day course for HOMs (Up to 2 sessions)		CAD_____	Up to 45	CAD_____
Pricing Schedule 2 Total (TAX excluded):					CAD_____

PRICING SCHEDULE 3: OPTION PERIOD TWO (12 MONTHS)

This section is only applicable if the option to extend the Standing Offer is exercised by Canada.

During the extended period of the Standing Offer specified below, the Offeror will be paid as specified below to perform all the Work in relation to the Standing Offer extension.

PRICING SCHEDULE 3 – OPTION PERIOD TWO					
	Category	Resource Name	Firm All-Inclusive Hourly rate	Estimated No. of Hours	Sub Total (in CAD)

			A	B	C = A x B
1	Course Design – 4 day leadership for managers		CAD _____	Up to 75	CAD _____
2	Course Delivery – 4 day leadership for managers (Up to 5 sessions)		CAD _____	Up to 150	CAD _____
3	Coaching – 4 day leadership for managers (Up to 5 sessions)		CAD _____	Up to 150	CAD _____
4	Course Design – 4 day leadership for executives.		CAD _____	Up to 60	CAD _____
5	Course Delivery – 4 day leadership for executives (Up to 4 sessions)		CAD _____	Up to 120	CAD _____
6	Coaching – 4 day leadership for executives (Up to 4 sessions)		CAD _____	Up to 120	CAD _____
7	Course Design – 10 day leadership for executives		CAD _____	Up to 112.5	CAD _____
8	Course Delivery – 10 day leadership for executives (Up to 3 sessions)		CAD _____	Up to 225	CAD _____
9	Coaching – 10 day leadership for executives (up to 3 sessions)		CAD _____	Up to 213.75	CAD _____
10	Course Design – 3 day course for HOMs		CAD _____	Up to 22.5	CAD _____
11	Course Delivery – 3 day course for HOMs (Up to 2 sessions)		CAD _____	Up to 45	CAD _____
Pricing Schedule 3 Total (TAX excluded):					CAD _____

PRICING SCHEDULE 4: OPTION PERIOD THREE (12 MONTHS)

This section is only applicable if the option to extend the Standing Offer is exercised by Canada.

During the extended period of the Standing Offer specified below, the Offeror will be paid as specified below to perform all the Work in relation to the Standing Offer extension.

PRICING SCHEDULE 4 – OPTION PERIOD THREE					
	Category	Resource Name	Firm All-Inclusive Hourly rate	Estimated No. of Hours	Sub Total (in CAD)
			A	B	C = A x B
1	Course Design – 4 day leadership for managers		CAD_____	Up to 75	CAD _____
2	Course Delivery – 4 day leadership for managers (Up to 5 sessions)		CAD_____	Up to 150	CAD _____
3	Coaching – 4 day leadership for managers (Up to 5 sessions)		CAD_____	Up to 150	CAD _____
4	Course Design – 4 day leadership for executives.		CAD_____	Up to 60	CAD_____
5	Course Delivery – 4 day leadership for executives (Up to 4 sessions)		CAD_____	Up to 120	CAD_____
6	Coaching – 4 day leadership for executives (Up to 4 sessions)		CAD_____	Up to 120	CAD_____
7	Course Design – 10 day leadership for executives		CAD_____	Up to 112.5	CAD_____
8	Course Delivery – 10 day leadership for executives (Up to 3 sessions)		CAD_____	Up to 225	CAD_____
9	Coaching – 10 day leadership for executives (up to 3 sessions)		CAD_____	Up to 213.75	CAD_____

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10	Course Design – 3 day course for HOMs		CAD _____	Up to 22.5	CAD _____
11	Course Delivery – 3 day course for HOMs (Up to 2 sessions)		CAD _____	Up to 45	CAD _____
Pricing Schedule 4 Total (TAX excluded):					CAD _____

PRICING SCHEDULE 5: OPTION PERIOD FOUR (12 MONTHS)

This section is only applicable if the option to extend the Standing Offer is exercised by Canada.

During the extended period of the Standing Offer specified below, the Offeror will be paid as specified below to perform all the Work in relation to the Standing Offer extension.

PRICING SCHEDULE 5 – OPTION PERIOD FOUR					
	Category	Resource Name	Firm All-Inclusive Hourly rate	Estimated No. of Hours	Sub Total (in CAD)
			A	B	C = A x B
1	Course Design – 4 day leadership for managers		CAD _____	Up to 75	CAD _____
2	Course Delivery – 4 day leadership for managers (Up to 5 sessions)		CAD _____	Up to 150	CAD _____
3	Coaching – 4 day leadership for managers (Up to 5 sessions)		CAD _____	Up to 150	CAD _____
4	Course Design – 4 day leadership for executives.		CAD _____	Up to 60	CAD _____
5	Course Delivery – 4 day leadership for executives (Up to 4 sessions)		CAD _____	Up to 120	CAD _____
6	Coaching – 4 day leadership for executives (Up to 4 sessions)		CAD _____	Up to 120	CAD _____
7	Course Design – 10 day leadership		CAD _____	Up to 112.5	CAD _____

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	for executives				
8	Course Delivery – 10 day leadership for executives (Up to 3 sessions)		CAD_____	Up to 225	CAD_____
9	Coaching – 10 day leadership for executives (up to 3 sessions)		CAD_____	Up to 213.75	CAD_____
10	Course Design – 3 day course for HOMs		CAD_____	Up to 22.5	CAD_____
11	Course Delivery – 3 day course for HOMs (Up to 2 sessions)		CAD_____	Up to 45	CAD_____
Pricing Schedule 5 Total (TAX excluded):					CAD_____

PRICING SCHEDULE 6: SUMMARY PRICING SCHEDULE

SUMMARY PRICING SCHEDULE	
Total Evaluated Price - Sum of Schedules 1, 2, 3, 4 and 5 (VAT excluded) =	CAD_____

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ANNEX "C" - SECURITY REQUIREMENTS CHECK LIST

See attached SRCL.

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ANNEX “D” – NON-DISCLOSURE AGREEMENT

I, _____, recognize that in the course of my work as an employee or subcontractor of _____, I may be given access to information by or on behalf of Canada in connection with the Work, pursuant to Contract Serial No. _____ between Her Majesty the Queen in right of Canada, represented by the Minister of Foreign Affairs, Trade and Development Canada and _____, including any information that is confidential or proprietary to third parties, and information conceived, developed or produced by the Contractor as part of the Work. For the purposes of this agreement, information includes but not limited to: any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form, recorded electronically, or otherwise and whether or not labeled as proprietary or sensitive, that is disclosed to a person or that a person becomes aware of during the performance of the Contract.

I agree that I will not reproduce, copy, use, divulge, release or disclose, in whole or in part, in whatever way or form any information described above to any person other than a person employed by Canada on a need to know basis. I undertake to safeguard the same and take all necessary and appropriate measures, including those set out in any written or oral instructions issued by Canada, to prevent the disclosure of or access to such information in contravention of this agreement.

I also acknowledge that any information provided to the Contractor by or on behalf of Canada must be used solely for the purpose of the Contract and must remain the property of Canada or a third party, as the case may be.

I agree that the obligation of this agreement will survive the completion of the Contract Serial No.: _____

Signature

Date