



**RETURN BIDS TO:**

**Employment and Social Development Canada  
(ESDC)**

Attention: Lisa Plante  
[nc-solicitations-gd@hrsdcc.gc.ca](mailto:nc-solicitations-gd@hrsdcc.gc.ca)

***REQUEST FOR PROPOSAL***

***THE SIGNATURE INDICATES  
ACCEPTANCE OF THE TERMS AND  
CONDITIONS SET OUT HEREIN***

<b>Title:</b> Training Delivery for Project Scheduling with Microsoft Project Server 2010	
<b>Solicitation No.</b> 100004593	<b>Date</b> October 7, 2015
<b>File No. – N° de dossier</b>	
<b>Solicitation Closes</b> At 02 :00 PM / 14 h November 17, 2015	<b>Time Zone</b> Eastern Standard Time (EST)
<b>Address Inquiries to :</b> <a href="mailto:nc-solicitations-gd@hrsdcc.gc.ca">nc-solicitations-gd@hrsdcc.gc.ca</a> Maximum size limit – 13MB	
<b>Destination</b> See Herein	
<b>Name and address of Vendor/firm</b>	
<b>Telephone No.</b>	
<b>Name and title of person authorized to sign on behalf of Vendor/firm (type or print)</b>	
<b>Signature</b>	<b>Date</b>



## TABLE OF CONTENTS

### PART 1 - INFORMATION AND INSTRUCTIONS

1. Security Requirement
2. Statement of Work
3. Standard Instructions, Clauses and Conditions
4. Submission of Bids
5. Mandatory Certifications Precedent to Contract Award
6. Enquiries – Bid Solicitation
7. Evaluation Procedures
8. Applicable Laws
9. Debriefings

### PART 2 - RESULTING CONTRACT CLAUSES

1. Applicable Laws
2. Priority of Documents
3. Statement of Work
4. Standard Clauses and Conditions
5. Security Requirement
6. Period of Contract
7. Authorities
8. Basis of Payment
9. Method of Payment
10. Invoice Submission
11. Foreign Nationals (Canadian Contractor) (*if applicable*); or
11. Foreign Nationals (Foreign Contractor) (*if applicable*)
12. Proactive Disclosure of Contracts with Former Public Servants(*if applicable*)
13. Certifications
14. Taxes – Foreign-based Contractor (*if applicable*)

#### List of Annexes:

- |           |                                  |
|-----------|----------------------------------|
| Annex "A" | Statement of Work                |
| Annex "B" | Evaluation Criteria              |
| Annex "C" | Security Requirements Check List |



**TITLE:** Training Delivery for Project Scheduling with Microsoft Project

## **PART 1 - INFORMATION AND INSTRUCTIONS**

### **1. Security Requirement**

There is a security requirement associated with the requirement. For additional information, consult Part 1 - Information and Instructions, clause 7.4, Security Requirement, and Part 2 - Resulting Contract Clauses.

### **2. Statement of Work**

See Annex "A".

### **3. 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>) 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, with the exception of the following:

1. Replace references to 'Public Works and Government Services Canada' with 'Employment and Social Development Canada';
2. Delete Section 02, Procurement Business Number, in its entirety;
3. Revise Subsection 2d. of Section 05, Submission of Bids, to read:  
*"send its bid only to the physical or e-mail address specified on Page 1".*
4. Subsection 5.4 of Section 05 is amended as follows:  
Delete: sixty (60) days  
Insert: ninety calendar (90) days
5. Delete Subsections 1a. and 1b. of Section 12, Rejection of Bid, in their entirety.
6. Delete Subsection 2. of Section 20, Further Information, in its entirety.

### **4. Submission of Bids**

Bids must be received at the email address [nc-solicitations-gd@hrscd-rhdcc.gc.ca](mailto:nc-solicitations-gd@hrscd-rhdcc.gc.ca), by the time and date indicated on the cover page of this RFP document.



It is the Bidders responsibility to ensure their proposal and all associated documents are received in full and on time. It is advised that Bidders send the proposal in advance of the closing time to ensure confirmation of receipt. Bidders should ensure e-mails do not exceed 13MB to avoid problems with transmission.

Canada requests that bidders provide their full company name and address, e-mail address, as well as contact name, and telephone number.

Canada requests that bidders provide their bid in separately bound sections, in two separate envelopes, when submitted in hard copy, and in two separate files, when in soft copy, as follows:

Section I: Technical Bid - 1 soft copy via e-mail

Section II: Financial Bid - 1 soft copy via e-mail

Section III: Certifications - 1 soft copy via e-mail

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

## **5. Mandatory Certifications Required Precedent to Contract Award**

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

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, if any certification made by the Bidder is found to be untrue whether 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 with this request will also render the bid non-responsive or will constitute a default under the Contract.

### **5.1 Declaration of Convicted Offences**

Pursuant to subsection Declaration of Convicted Offences of section 01 of the Standard Instructions, if requested by the Contracting Authority during the bid evaluation process, the Bidder must provide with its bid, a completed Declaration Form (<http://www.tpsgc-pwgsc.gc.ca/ci-if/formulaire-form-eng.html>), to the contracting officer, to be given further consideration in the procurement process.

#### **Integrity Provisions – List of Names**

Bidders who are incorporated, including those bidding as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Bidder.

Bidders bidding as sole proprietorship, as well as those bidding as a joint venture, must provide the name of the owner(s).

Bidders bidding as societies, firms or partnerships do not need to provide lists of names.

### **5.2 Former Public Servant Certification**



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 FPS, 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.
- e. "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.
- f. "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 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 ( )**

\* Bidder (For greater clarity, the "Bidder" means the vendor legal entity (e.g. not a resource of the vendor legal entity).

If so, the Bidder must provide the following information, for all FPS 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.

### **5.3 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.

### **5.4 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, 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.

### **5.5 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](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)" list ([http://www.labour.gc.ca/eng/standards\\_equity/eq/emp/fcp/list/inelig.shtml](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)) available from [Human Resources and 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.

## 6. Enquiries - Bid Solicitation

All enquiries must be submitted to the Contracting Authority no later than seven (7) calendar days before the bid closing date. Enquiries received after that time may not be answered.

## 7. Evaluation Procedures

Bids received will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria specified below:

### 7.1 Technical Evaluation

All bids must be completed in full and provide all of the information requested in the bid solicitation to enable full and complete evaluation. All mandatory technical criteria are identified specifically with the words "shall", "must", or "will".

Mandatory and point rated technical evaluation criteria are included in Annex "B".

### 7.2 Financial Evaluation

The price of the bid will be evaluated in Canadian dollars, Applicable Taxes excluded, FOB destination, Canadian customs duties and excise taxes included.

The financial bid MUST submit prices as requested in the Pricing Schedule at **ATTACHMENT 1 TO PART 1**. The total amount of Goods and Services Tax (GST) or Harmonized Sales Tax (HST), as applicable, must be shown separately, if applicable.

### 7.3 Basis of Selection - Highest Combined Rating of Technical and Price

1. To be declared responsive, a bid must:
  - a. comply with all the requirements of the bid solicitation; and
  - b. meet all mandatory criteria; and
  - c. obtain the required minimum of 75% overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 140 points.
2. Bids not meeting (choose "(a) or (b) or (c)") will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70 % for the technical merit and 30% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.



6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.
8. Tie Breaker: When two or more responsive proposals achieve the identical score, the proposal with the highest score in the Rated Criteria will be will be recommended for contract award..

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 70/30 ratio of technical merit and price, respectively. The total available points for technical score equal 135 and for price, 45 points, based on the lowest evaluated price of \$50,000.

Basis of Selection - Highest Combined Rating of Technical Merit (70%) and Price (30%)

10	Bidder 1	Bidder 2	Bidder 3
Overall Score for All the Point Rated Technical Criteria	OS1: 88/135	OS2: 82/135	OS3: 92/135
Bid Evaluated Price	P1: C\$60,000	P2: C\$55,000	P3: C\$50,000
Calculations	Technical Merit Score (OSi x 70)	Pricing Score ( LP/Pi x 40 )	Combined Rating
Bidder 1	$88/135 \times 70 = 45.62$	$50/60 \times 30 = 24.99$	70.61 (2 <sup>nd</sup> )
Bidder 2	$82/135 \times 70 = 42.51$	$50/55 \times 30 = 27.27$	69.78 (3 <sup>rd</sup> )
Bidder 3	$92/135 \times 70 = 47.70$	$50/50 \times 30 = 30.00$	77.70 (1 <sup>st</sup> )





#### 7.4 Security Requirement

1. 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 2 - 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 2 - 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;
2. In the case of a joint venture bidder, each member of the joint venture must meet the security requirements.
3. 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.

#### 8. 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.

#### 9. Debriefings

After contract award, 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.



**ATTACHMENT 1 TO PART 1  
Pricing Schedule**

The bidder must complete this pricing schedule and include it in its Financial Bid.

Any estimated level of services specified in this pricing schedule is provided for bid evaluation price determination purposes only. Levels of efforts are provided as estimates only, and must not be construed as a commitment by ESDC to respect those estimates in any resulting contract.

<b>Course</b>	<b>Estimated quantity</b>	<b>Firm Price per course delivery</b>	<b>Total</b>
<b>Managing Projects with Project Server 2010</b>	10	\$	
<b>Refresher – Project Server 2010 and proper scheduling</b>	5	\$	
	<b>Total evaluated price</b>	-----	



## PART 2 - RESULTING CONTRACT CLAUSES

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

1. Applicable Laws
2. Priority of Documents
3. Statement of Work
4. Standard Clauses and Conditions
5. Security Requirement
6. Term of Contract
7. Authorities
8. Payment
9. Method of Payment
10. Invoice Submission
11. Foreign Nationals (Canadian Contractor) *(if applicable)*; or
11. Foreign Nationals (Foreign Contractor) *(if applicable)*
12. Proactive Disclosure of Contracts with Former Public Servants
13. Taxes – Foreign-based Contractor *(if applicable)*

### List of Annexes:

- Annex "A"      Statement of Work  
Annex "B"      Security Requirements Check List

#### 1. Applicable Laws

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

#### 2. 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 General Conditions 2029 - Goods or Services (Low Dollar Value (2015-07-03));
- (c) Annex "A", Statement of Work;
- (d) Annex "B", Security Requirements Check List
- (e) the Contractor's bid dated \_\_\_\_\_,

#### 3. Statement of Work

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

#### 4. 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.



Whenever 'Public Works and Government Services Canada' appears in any of the standard clauses or the General or Supplemental Conditions replace with "Employment and Social Development Canada".

#### 4.1 General Conditions

2029 (2015-07-03) General Conditions - Goods or Services (Low Dollar Value), apply to and form part of the Contract, with the following exceptions:

- 4.1.1 Delete reference to 'Client Reference Number (CRN)' and 'Procurement Business Number (PBN)' from Section 06, sub-section 2.a
- 4.1.2 Delete sub-sections 08
- 4.1.3 Delete sub-sections 09
- 4.1.4 Delete sub-sections 10

#### 5. Security Requirement

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer/Supply Arrangement, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
2. The Contractor/Offeror personnel requiring access to PROTECTED information, assets or sensitive work site(s) must EACH hold a valid **RELIABILITY STATUS**, granted or approved by CISD/PWGSC.
3. The Contractor/Offeror **MUST NOT** remove any PROTECTED information or assets from the identified work site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction.
4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
5. The Contractor/Offeror must comply with the provisions of the:
  - a. Security Requirements Check List and security guide (if applicable), attached at Annex B;
  - b. *Industrial Security Manual* (Latest Edition).

#### 6. Period of the Contract

The period of the Contract is from contract award to a period of one year later.

#### 7. Authorities

##### 7.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Lisa Plante Title: Sr. Procurement Specialist  
Employment and Social Development Canada  
Procurement and Contracting  
Address: 140 Promenade du portage, Gatineau, QC K1A-0J9  
Telephone: (819) 654-5934



E-mail address: lisa.plante@hrsdc-rhdcc.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.

**7.2 Project Authority**

The Project Authority for the Contract is: (To be inserted at contract award)

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.

**7.3 Contractor's Representative**

The Contractor's Representative for the Contract is: (To be inserted at contract award)

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_-\_\_\_\_-\_\_\_\_\_  
E-mail address: \_\_\_\_\_

**8. Payment**

**8.1 Basis of Payment**

**8.1.1 Fees**

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid all-inclusive rates as detailed in the table below. Customs duties are included and Applicable Taxes are extra.



Course	Estimated quantity	Firm Price per course delivery
Managing Projects with Project Server 2010	10	\$
Refresher – Project Server 2010 and proper scheduling	5	\$

## 8.2 Limitation of Expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed \$ *(insert amount at contract award)* \_\_\_\_\_. Customs duties are included and Applicable Taxes are extra.
2. 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.
3. 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.

## 9. Method of Payment

### 9.1 Monthly Payment

Canada will pay the Contractor on a monthly basis for work performed during the month covered by the invoice in accordance with the payment provisions of the Contract if:

- a. an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all such documents have been verified by Canada;
- c. the Work performed has been accepted by Canada.



## 10. Invoice Submission

1. Invoices must be submitted in the Contractor's name. The Contractor must submit invoices for each delivery or shipment; invoices must only apply to the Contract. Each invoice must indicate whether it covers partial or final delivery.
2. Invoices must show:
  - a. the date, the name and address of the client department, item or reference numbers, deliverable/description of the Work, contract number, Procurement Business Number (PBN), if applicable, and financial code(s);
  - b. details of expenditures (such as item, quantity, unit of issue, unit price, fixed time labour rates and level of effort, subcontracts, as applicable) in accordance with the Basis of Payment, exclusive of Applicable Taxes;
  - c. deduction for holdback, if applicable;
  - d. the extension of the totals, if applicable; and
  - e. if applicable, the method of shipment together with date, case numbers and part or reference numbers, shipment charges and any other additional charges.
3. Applicable Taxes must be specified on all invoices as a separate item along with corresponding registration numbers from the tax authorities. All items that are zero-rated, exempt or to which Applicable Taxes do not apply, must be identified as such on all invoices.
4. By submitting an invoice, the Contractor certifies that the invoice is consistent with the Work delivered and is in accordance with the Contract.

### 10.1. T1204 Information Reporting by Contractor

1. Pursuant to paragraph 221 (1)(d) of the [Income Tax Act](#), R.S. 1985, c.1 (5<sup>th</sup> Supp.), payments made by departments and agencies to contractors under applicable services contracts (including contracts involving a mix of goods and services) must be reported on a T1204 Government Service Contract Payments slip.
- 2.

*Note to Bidders: Either this clause or the one that follows, whichever applies (based on whether the successful bidder is a Canadian Contractor or Foreign Contractor), will be included in any resulting contract*

### 11. Foreign Nationals (Canadian Contractor)

The Contractor must comply with Canadian immigration requirements applicable to foreign nationals entering Canada to work temporarily in fulfillment of the Contract. If the Contractor wishes to hire a foreign national to work in Canada to fulfill the Contract, the Contractor should immediately contact the nearest Service Canada regional office to enquire about Citizenship and Immigration Canada's requirements to issue a temporary work permit to a foreign national. The Contractor is responsible for all costs incurred as a result of non-compliance with immigration requirements.

OR

### 11. Foreign Nationals (Foreign Contractor)



The Contractor must comply with Canadian immigration legislation applicable to foreign nationals entering Canada to work temporarily in fulfillment of the Contract. If the Contractor wishes to hire a foreign national to work in Canada to fulfill the Contract, the Contractor should immediately contact the nearest Canadian Embassy, Consulate or High Commission in the Contractor's country to obtain instructions, information on Citizenship and Immigration Canada's requirements and any required documents. The Contractor is responsible to ensure that foreign nationals have the required information, documents and authorizations before performing any work under the Contract in Canada. The Contractor is responsible for all costs incurred as a result of non-compliance with immigration requirements.

## 12. 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

## 13. Certifications

### 13.1 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.

## 13. Taxes – Foreign-based Contractor *(if applicable)*

Unless specified otherwise in the Contract, the price includes no amount for any federal excise tax, state or local sales or use tax, or any other tax of a similar nature, or any Canadian tax whatsoever. The price, however, includes all other taxes. If the Work is normally subject to federal excise tax, Canada will, upon request, provide the Contractor a certificate of exemption from such federal excise tax in the form prescribed by the federal regulations.

Canada will provide the Contractor evidence of export that may be requested by the tax authorities. If, as a result of Canada's failure to do so, the Contractor has to pay federal excise tax, Canada will reimburse the Contractor if the Contractor takes such steps as Canada may require to recover any payment made by the Contractor. The Contractor must refund to Canada any amount so recovered.





## ANNEX "A"

### STATEMENT OF WORK

#### 1.0 Title

##### Managing Projects with Project Server 2010

ESDC requires the Contractor to provide training to all project teams on the principles, methodology and processes required to develop sound project schedules for on-going and new projects. This will ensure consistency in all projects being managed and reported within the organization. There will be two trainings sessions for employees, one for new users of the product, the other a refresher for current project managers and schedulers.

- ESDC requires the Contractor to provide training to project teams on how to create forecast schedules using MS Project Professional 2010.
- ESDC requires the Contractor to provide training to project teams on how to use the Project Server team site functions, including risk, issue, change management and proper document storage.
- ESDC requires the Contractor to provide training to project teams, on the reporting functions in the Business Intelligence function.

The target audience for the Managing Projects with Project Server 2010 course are project managers and project schedulers in ESDC.

#### 2.0 Objectives

The primary objective of Managing Projects with Project Server 2010 using proper forecast scheduling techniques to increase project scheduling knowledge within the department to ensure proper schedules are in place for all approved projects.

This training will:

1. ESDC requires the Contractor to provide training to all project teams on the principles, methodology and processes required to develop sound project schedules for on-going and new projects. This will ensure consistency in all projects being managed and reported within the organization.
2. ESDC requires the Contractor to provide training to project teams on how to create forecast schedules using MS Project Professional 2010.
3. ESDC requires the Contractor to provide training to project teams on how to use the Project Server team site functions, including risk, issue, change management and proper document storage.
4. ESDC requires the Contractor to provide training to project teams, PMO's and Executives on the reporting functions in the Business Intelligence function.

This training will provide relevant information and explanations of.

1. General project management and project scheduled practice;



2. Project Forecast Scheduling Best Practices;
3. Scheduling with Microsoft Project 2010 using Project Server 2010;
4. Risk and Issue Management with Project Server 2010;
5. Reporting functions with Business Intelligence.

### **3.0 Background Statement**

Employment and Social Development Canada (ESDC) is in the process of enhancing its project management capacity to support departmental projects of varying degrees of risk and complexity. The department is reviewing current processes, tools and capacity levels to ensure it is well positioned to support successful project outcomes.

#### Enterprise Project Management Office

1. The Investment, Procurement and Project Management (IPPM) Office has established an Enterprise Project Management Office (EPMO) with the responsibility of:
  - Supporting departmental project governance;
  - Enhancing departmental Project Management capacity and developing a culture of continuous improvement;
  - Establishing and implementing departmental project management standards;
  - Monitoring and reporting on departmental project lifecycles and project benefits and outcomes, and
  - Monitoring compliance against project management policies and guidelines.
2. It is anticipated the EPMO will be operational by the end of 2016 calendar year
3. ESDC has in place a departmental Project Management Information System (PMIS) with a project dashboard which follows the Treasury Board standard and includes project information on the scope, budget, and schedule. It also highlights the escalated risks, issues, and any change requests that are currently being processed.
4. ESDC has converted all project schedules from the old enterprise system – Microsoft (MS) Project Server 2003 to MS Project Server 2010. Project Professional 2010 is the desktop enterprise project management program that is used with MS Project Server 2010.
5. All ESDC Dashboards will be produced using the PMIS which is currently MS Project Server 2010 and MS Project Professional 2010.
6. Effective 1 April 2014, ESDC has converted to a SAP Data Processing System for all financial management functions including project financial.

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ESDC has in place a departmental Project Management Information System (PMIS) with a project dashboard which follows the Treasury Board standard and includes project information on the scope, budget, and schedule. It also highlights the escalated risks, issues, and any change requests that are currently being processed.

ESDC has converted all project schedules from the old enterprise system – Microsoft (MS) Project Server 2003 to MS Project Server 2010. Project Professional 2010 is the desktop enterprise project management program that is used with MS Project Server 2010 and MS Project Web App.

## 4.0 Scope

### A. Scope: Session Structure and Content

#### 1. Managing Projects with Project Server 2010

Each and every session taught will cover all of the following topics, regardless of the delivery method and language. The total duration of each session will be no more than **22.5** hours. Contractor's facilitators will present each topic for the duration identified below.

- **Project Scheduling** – Provides information on Project Scheduling. The estimated duration is **22.5 hours**, in class interactive training.
  - Setting up new projects
  - Entering the Work Breakdown Structure
  - Entering Estimates
  - Entering Dependencies, Entering Deadlines, Constraints and Task Calendars
  - Entering Resources and Assignments
  - Optimizing your schedule
  - Keeping your schedule up to date
- **Project Server 2010 (6 hours)**
  - Project Web App
    - Project Details Page
  - SharePoint
    - Project Site usage and customization abilities
    - Risk and Issue Management
      - How to enter Risks and Issues
      - How to assign tasks to risks
  - Project Professional 2010 (see forecast scheduling above)
  - IM procedures (Document Storage)
    - Use of Knowledge and Lessons Learned Repository
- **Reporting (1.5 hours)**
  - Creating reports for Stakeholders
  - Project Reports, Portfolio Reports

#### 2. Refresher – Project Server 2010 and proper scheduling

The total duration of each session will be no more than **7.5** hours. Contractor's facilitators will present each topic for the duration identified below.

- **Project Scheduling (4 hours)**
  - Entering the Work Breakdown Structure



- Entering Estimates
- Entering Dependencies, Entering Deadlines, Constraints and Task Calendars
- Entering Resources and Assignments
- Optimizing your schedule
- Keeping your schedule up to date
- **Project Server 2010 (2 hours)**
  - Project Web App
    - Project Details Page
  - SharePoint
    - Project Site usage and customization abilities
    - Risk and Issue Management
      - How to enter Risks and Issues
      - How to assign tasks to risks
  - Project Professional 2010 (see forecast scheduling above)
  - IM procedures (Document Storage)
  - Use of Knowledge and Lessons Learned Repository
- **Reporting (1.5 hours)**
  - Creating reports for Stakeholders
  - Project Reports, Portfolio Reports

## B. Scope: Languages

The Contractor will provide materials in either of the two official languages and facilitators must be able to communicate fluently in either of the two official languages (i.e. French or English) to match the language of the training session. The Project Authority estimates that **100 percent** of the courses will be in English.

## C. Scope: Facilitators

The Contractor will provide a specialist facilitator and ensure they meet the minimum qualifications listed below. The Project Authority will approve all individual facilitators before each teaches his or her first session under the contract, and request replacements if required. If a facilitator meets all minimum criteria for multiple topics, he or she may deliver those multiple topics.

### Project Scheduling with Microsoft Project Professional 2010, Microsoft Project Server 2010 Refresher

- Federal security clearance: **Reliability**
- Professional certification or number of years' experience:
  - **Microsoft MVP**
  - **PMI – PMP Certification**
  - **5 years' experience on Microsoft Project 2010**
  - **10 years' experience providing Project Professional and Project Server training session**
  - **10 years' experience with developing courses on Microsoft Project**



Each facilitator must present information in a clear and concise manner, explaining the content to ensure all learners understand the key topics listed in this document.

### Facilitator scheduling

The Contractor will ensure that all facilitators are at the scheduled location and ready to present at the scheduled date and time.

## D. Scope: Logistics and Review

### All Sessions

- a. Accommodations for special needs: To better serve learners who require special accommodations, the Project Authority and the Contractor will work together to develop options to help the individual learn and participate effectively. The Project Authority, consulting with the Contractor, will choose the best course of action for the specific need. The Project Authority will assume all financial responsibility for implementing its decision. The Contractor will contribute its best efforts and the resources of its organization to implement the decision.
- b. Session evaluations: The Project Authority is responsible for all session evaluations. The Project Authority will collect participant session evaluations and will review the evaluations it collects from participants and, when necessary, provide its feedback to the Contractor.
- c. Auditing of sessions: The Project Authority reserves the right to audit any sessions held, assess the session content and review facilitator performance.

### In-Person Sessions

- a. Session timeframes: In-person sessions are to take place during business hours (between 8:00 am and 5:30 pm) in the time zone where the session occurs, for a total of **7.5 hours per day, including a 15-minute morning break, 45 minutes for lunch and a 15-minute afternoon break.** The total time is not to exceed **7.5 hours (7.5 hours per day, 3 days).**
- b. Minimum classroom requirements: Be capable of training up to **25** participants. The room will be suitable for training, including proper seating and tables. The room will have a computer, a projector and a screen, for use of any necessary media and the Internet during training. **Each computer will be set up with Project Professional 2010 and access to the Project Server training environment.**
- c. Estimated frequency: The Project Authority estimates it will require approximately:

**Managing Projects with Project Server 2010:**

- Comprehensive course on project management and forecast scheduling:  
10 in-person sessions each year, depending on circumstances.

**Project Server 2010 Refresher:**

- 5 in-person sessions each year, depending on circumstances.



## Course Material

The Contractor is responsible for providing all course textbook and/or training material to be supplied to all course attendees on day one of the training course.

All course material will be approved by the Contact Authority and must be provided 2 weeks in advance of the 1<sup>st</sup> course date for approval.

### 5.0 Anticipated Locations

National Capital Region of Canada. **Cities: Ottawa/Gatineau**

ESDC will host approximately **100 percent** of the in-person training sessions in its own facilities **[in the NHQ region]**. The Project Authority will be responsible to book ESDC training rooms.

### 6.0 Contact Period

The contract period is estimated to be from the date of contract award until a period of one year later.

### 7.0 Deadlines

Requirement	Timeline
<b>Project Authority to contact Contractor, in writing, to request a session</b>	At least <b>15</b> business days before the requested session start date
<b>Project Authority to submit Participant List, in writing, to Contractor (the Project Authority will aim for a minimum of 10 and maximum of 20 participants per session)</b>	At least <b>5</b> business days before scheduled session start date
<b>Project Authority to notify Contractor, in writing, to cancel a scheduled course session.</b>	At least <b>10</b> business days before scheduled session start date, with no charge whatsoever.
<b>Contractor to send course materials electronically to all registered Participants (to match the delivery language of the session)</b>	At least <b>2</b> business days before the scheduled session start date
<b>Contractor to e-mail to the Project Authority a copy of the Attendance List</b>  <b>(must include training title, session dates, Contractor name, participant names and</b>	Not more than <b>2</b> business days after the end of the session



Requirement	Timeline
<b>participant signatures)</b>	
<b>Project Authority can send request to Contractor, in writing, for a replacement facilitator</b>	At any time during the contract, with at least <b>10</b> business days' notice for the requested facilitator change to take effect
<b>Contractor can ask to introduce a new facilitator, by sending a written request for approval to the Project Authority</b>	At any time during the contract, with at least <b>10</b> business days' notice for the Project Authority to respond to the request
<b>Project Authority to notify Contractor, in writing, of the exact needs of any special accommodations learner</b>	At least <b>5</b> business days prior to the scheduled session start date that the learner requiring the special accommodations will attend
<b>Contractor to address concerns (from Session Evaluations/Audits) as submitted in writing by Project Authority, to Project Authority's satisfaction</b>	Before the next scheduled session begins



**ANNEX B**

**EVALUATION CRITERIA**

**Section A Mandatory Technical Criteria**

ID #	Mandatory Criteria	Submission Requirements	MET/NOT MET
M1	<p><b>Qualifications</b></p> <p>The bidding firm must be a certified Registered Education Provider (REP) approved by PMI (Project Management Institute) to issue professional development units (PDUs) for its project management training courses.</p>	<p>The bidder must provide a copy of the certification with the bidder's proposal.</p>	
M2	<p><b>Personnel Qualifications</b></p> <p>All resources proposed as Course Developers, Trainers or Scheduling Coaches must possess a PMP (Project Management Professional) certification.</p> <p><b>Note to Bidders:</b> The same resource may be proposed for more than one category of personnel as long as the individual proposed meets the criteria for that category.</p>	<p>For each proposed resource the bidder must provide the following information:</p> <ul style="list-style-type: none"> <li>• Name of the proposed resource</li> <li>• Category of personnel (i.e. Course Developer, Trainer and/or Scheduling Coach)</li> <li>• Proof of certification from the PMI (Project Management Institute).</li> </ul>	
M3	<p><b>Experience in Project Management</b></p> <p>The bidder must have experience, within the last 5 years from the date of issue of this RFP, providing project management training to a federal government department or agency.</p>	<p>The bidder must provide the following information:</p> <ul style="list-style-type: none"> <li>• The federal department or agency for whom the work was carried out</li> <li>• The Project Management course outline for the course delivered</li> <li>• a sample of the project management course material used to successfully deliver the training</li> <li>• When the work was carried out</li> <li>• The name, telephone number, regular and email addresses for a client representative who can confirm the information provided.</li> </ul>	
M4	<p><b>Experience teaching MS Project Professional 2010 and MS Project Server 2010</b></p> <p>All resources proposed as Trainers for Article 4.0 of the SOW must have 5 years' experience with MS Project Server 2010, and 10 years' experience with Microsoft Project and Project Server from date of issue of this RFP, delivering training in the</p>	<p>The Bidder must provide the following information:</p> <ul style="list-style-type: none"> <li>• The name of the proposed resource</li> <li>• A description of the training provided</li> <li>• When the work was carried out</li> </ul>	





ID #	Mandatory Criteria	Submission Requirements	MET/NOT MET
	development of project schedules.	<ul style="list-style-type: none"> <li>The name, telephone number, regular and email addresses for a client representative who can confirm the information provided.</li> </ul>	
<b>M5</b>	<b>Security Clearance</b>  All proposed resources must hold a valid Government of Canada security clearance at the level of RELIABILITY upon contract award.	For each proposed resource the Bidder must provide the relevant individual's security file number and date of expiration.	
<b>M6</b>	<b>Personnel Qualifications</b>  All resources must be a certified Microsoft MVP on Project.	The Bidder must provide the following information: <ul style="list-style-type: none"> <li>The name of the proposed resource</li> <li>The year of the Microsoft MVP certification</li> </ul>	

**Section B**      **Rated Technical Criteria**

#	Point Rated Criteria	Maximum Score	Scoring / Scale	Bidder Response and Self Score (explain how points are obtained and reference location in bid)	Evaluation team Scoring and comments**	
					Score	Comments**
R1	The Bidder should demonstrate that the proposed Trainer has experience developing and delivering the use of MS Project Server 2013, 2010, 2007 or MS Project Professional suite of products within the <u>last 3 years</u> . The bidder should provide up to five (5) written project* summaries that each include the following details: 1) Name of client	60 Points Maximum	Up to 10 points per project, in accordance with the scales below.  <b>Project Server (5 points per training course)</b> <b>5 points:</b> Microsoft Project Server 2013, <b>5 points:</b> Microsoft Project Server 2010, <b>3 points:</b> Microsoft Project Server 2007 <b>2 points:</b> Microsoft	<Trainer Name> <Course Description> <Client Organization> <Timeframe, # days>  <b>TOTAL Project Server Points:</b> <b>TOTAL Project Professional Points:</b>		



#	Point Rated Criteria	Maximum Score	Scoring / Scale	Bidder Response and Self Score (explain how points are obtained and reference location in bid)	Evaluation team Scoring and comments**	
					Score	Comments**
	organization 2) Name of client contact and contact information 3) Description of training 4) Duration of training		Project Server 2007  <b>Project Professional Server (5 points per training)</b> <b>5 points:</b> Microsoft Project Professional 2013 <b>5 points:</b> Microsoft Project Professional 2010 <b>3 points:</b> Microsoft Project Professional 2007 <b>2 points:</b> Microsoft Project Professional 2003			
R2	The Bidder should demonstrate that the proposed Trainer has experience developing and delivering in class training courses on Project Scheduling practice as listed <u>last 3 years</u> . The bidder should provide up to five (5) written project* summaries that each include the following details: 1) Name of client organization 2) Name of client contact and contact information 3) Description of training 4) Duration of training	60 Points Maximum	Up to 10 points per course, in accordance with the scales below. <b>Project Management (5 points per training course)</b> <b>5 points:</b> Project Scheduling (WBS, Project Lifecycle, Activity identification, dependencies, duration and resourcing.	<Trainer Name> <Course Description> <Client Organization> <Timeframe, # days>  <b>TOTAL Project Server Points:</b> <b>TOTAL Project Professional Points:</b>		
R3	The Bidder should demonstrate that the proposed Trainer has experience developing and delivering in class training courses on	20 Points Maximum	5 points per training session.	<Trainer Name> <Course Description> <Client Organization> <Timeframe, # days> <b>TOTAL Points:</b>		



#	Point Rated Criteria	Maximum Score	Scoring / Scale	Bidder Response and Self Score (explain how points are obtained and reference location in bid)	Evaluation team Scoring and comments**	
					Score	Comments**
	Project Scheduling practice in French.					
<b>Total Maximum score</b>		<b>140</b>		<b>Total Score</b>		<b>Pass Mark of 75% (105) must be obtained.</b>



## ANNEX "C"

### Security Requirements Check List

[Common PS SRCL#6](#)