RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:

Bid Receiving - PWGSC / Réception des soumissions - TPSGC
11 Laurier St. / 11, rue Laurier
Place du Portage , Phase III
Core 0B2 / Noyau 0B2
Gatineau, Québec K1A 0S5
Bid Fax: (819) 997-9776

Request For Supply Arrangement - Demande pour un arrangement en matière d'approvisionnement

Offer to: Department of Public Works and Government Services

We hereby offer to provide to Canada, as represented by the Minister of Public Works and Government Services, in accordance with the terms and conditions set out herein or attached hereto, the goods, services, and construction detailed herein and on any attached sheets.

Offre au: Ministère des Travaux publics et des Services gouvernementaux

Nous offrons par la présente de fournir au Canada, représenté par le ministre des Travaux publics et des Services gouvernementaux, aux conditions énoncées ou incluses par référence dans la présente et aux annexes ci-jointes, les biens, services et construction énumérés ici et sur toute feuille ci-annexée.

Comments - Commentaires

Title - Sujet LEARNING SERVICES	
Solicitation No. - N° de l'invitation E60ZH-070003/I	**Date** 2016-02-23
Client Reference No. - N° de référence du client E60ZH-070003	**GETS Ref. No. - N° de réf. de SEAG** PW-$$ZH-125-29876
File No. - N° de dossier 125zh.E60ZH-070003	**CCC No./N° CCC - FMS No./N° VME**

Solicitation Closes - L'invitation prend fin
at - à **02:00 PM**
on - le **2016-04-04**

Time Zone
Fuseau horaire
Eastern Daylight Saving Time EDT

Delivery Required - Livraison exigée

See Herein

Address Enquiries to: - Adresser toutes questions à: Deslauriers, J-S	**Buyer Id - Id de l'acheteur** 107zh
Telephone No. - N° de téléphone (819)956-9160 ( )	**FAX No. - N° de FAX** (819)956-9235

Destination - of Goods, Services, and Construction:
Destination - des biens, services et construction:

DEPARTMENT OF PUBLIC WORKS AND GOVERNMENT SERVICES CANADA
AS PER RESULTING CALL-UPS
Canada

Security - Sécurité

This request for a Supply Arrangement does not include provisions for security.
Cette Demande pour un arrangement ne comprend pas des dispositions en matière de sécurité.

Instructions: See Herein

Instructions: Voir aux présentes

Vendor/Firm Name and Address
Raison sociale et adresse du fournisseur/de l'entrepreneur

Vendor/Firm Name and Address
Raison sociale et adresse du fournisseur/de l'entrepreneur

Telephone No. - N° de téléphone
Facsimile No. - N° de télécopieur

Issuing Office - Bureau de distribution

Training and Specialized Services Division/Division de la formation et des services spécialisés
11 Laurier St. / 11, rue Laurier
10C1, Place du Portage
Gatineau, Québec   K1A 0S5

Name and title of person authorized to sign on behalf of Vendor/Firm (type or print)
Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)

Signature   **Date**

LEARNING SERVICES BID SOLICITATION FOR SUPPLY ARRANGEMENTS

FOR

**ALL FEDERAL GOVERNMENT DEPARTMENTS AND AGENCIES AND
CROWN CORPORATIONS**

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COMPONENT 1 - REQUEST FOR ARRANGEMENT

PART 1 - GENERAL INFORMATION

1. Introduction

This solicitation has two components: a Request for Arrangement and a Supply Arrangement.

Component I - Request for Arrangement

The Request for Arrangement is divided into five parts plus attachments, as follows:

Part 1: General Information: provides a general description of the requirement;

Part 2: Supplier Instructions: provides the instructions applicable to the clauses and conditions of the request for arrangements;

Part 3: Arrangement Preparation Instructions: provides Suppliers with instructions on how to prepare their arrangement to address the evaluation criteria specified;

Part 4: Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria which must be addressed in the arrangement, the security requirement, and the basis of selection;

Part 5: Certifications: includes the certifications to be provided; and

The Attachments include:

Attachment A	Supplier Profile/Centralized Professional Services System (CPSS) Supplier Module - Enrollment
Attachment B	Supply Arrangement Technical Evaluation
Attachment C	Technical Response Template/CPSS Supplier Module - Data Collection Component (DCC)
Attachment D	Certifications /CPSS Supplier Module – Data Collection Component (DCC): Certifications

Component II - Supply Arrangement

The Supply Arrangement is divided into three parts plus annexes, as follows:

Part 6A: Supply Arrangement: includes the Supply Arrangement with the applicable clauses and conditions;

Part 6B: Bid Solicitation: includes the instructions for the bid solicitation process within the scope of the Supply Arrangement; and

Part 6C: Resulting Contract Clauses: includes general information for the conditions which will apply to any contract entered into pursuant to the Supply Arrangement.

The Annexes include:

Annex A	SA	Requirements for Services
Annex B	SA	Generic Security Requirement Check Lists
Annex C	SA	Insurance Requirements
Annex E	SA	Basis of Payment
Annex H	SA	SA Sample Quarterly Usage Report
Annex I	SA	Client Satisfaction Form

2.   SUMMARY

2.1   This solicitation is a tender for arrangements to satisfy the Government of Canada's requirement for the provision of Learning Services to locations throughout Canada, excluding any locations in areas subject to any of the Comprehensive Land Claims Agreements (the "Services").

The Learning Services method of supply (including both a Standing Offer and Supply Arrangement) is a government-wide procurement vehicle designed to provide access to pre-qualified Suppliers who can:

- create, update or convert government owned training courses including training material for:
    - o   Traditional Classroom based training;
    - o   ELearning / on-line training; and/or
    - o   Blended Learning
- Deliver government owned training

2.2   **Streams/Categories of Personnel**

The Services include the following Streams:

Stream 1 - Strategic Learning Advisory Service
Stream 2 - Instructional Design and Development Service
Stream 3 - Custom e-Learning Product Programming Service
Stream 4 - Rapid e-Learning Product Programming Service
Stream 5 - Quality Assurance Service
Stream 6 - Multimedia Design and Development Service
Stream 7 - Project Management Service
Stream 8 - Training Delivery

2.3 Clients / Identified Users

Any resulting instrument may be used by any Government Department, Departmental Corporation or Agency, or other body of the Government of Canada (including all those described in the Financial Administration Act, as amended from time to time) or any other party for which the Department of Public Works and Government Services has been authorized to act from time to time under section 16 of the Department of Public Works and Government Services Act (each a "Client" or "Identified User").

2.4 The Period of the Instruments

The period for awarding contracts under the Supply Arrangement begins on the start date of the Supply Arrangement to December 31, 2016.

2.5 Arrangement Solicitation

It is intended that this solicitation is to allow new suppliers to become pre-qualified under the appropriate Region, Metropolitan Area, Streams and/or Categories. An "Existing Supplier" is a supplier who has been pre-qualified: holds a Supply Arrangement at the submission date, is in good standing and whose profile and pre-qualified Streams/Categories are already in the Centralized Professional Services System for use by Federal Government Departments.

The Submission of a bid during this Learning Services quarterly Supply Arrangement refresh is optional. Existing Suppliers may submit an arrangement only if they wish to add to their current qualifications (ex: Regions, Metropolitan Areas, Streams and/or Categories). Suppliers may submit an arrangement for a Supply Arrangement at any time by responding to the most recent refresh terms and conditions posted on GETS.

Canada may issue supply arrangements to bidders who qualify throughout the entire period of the Supply Arrangement. Evaluations of such arrangements will be processed on a quarterly basis, with targeted schedules identifying the closing dates for each quarterly valuation cycle.

2.6 Trade Agreements

This requirement is subject to the provisions of the North American Free Trade Agreement (NAFTA), the Agreement on Internal Trade (AIT), the Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Columbia Free Trade Agreement (CColFTA), and the Canada-Panama Free Trade Agreement (CPanFTA) if it is in force.

2.7 Designation as Set Aside

Part of this procurement may be designated by one or more Identified Users as set-aside under the federal government's Procurement Strategy for Aboriginal Business (PSAB). In these specific cases, (i) the procurement is set aside from the international trade agreements under the provision each has for set-asides for small and minority businesses, and (ii) as per Article 1802 of the AIT, the AIT does not apply.

In order to be considered as an Aboriginal Business under the PSAB, Suppliers must complete and sign the certification contained in Attachment D of Component I.

3. Security Requirement

There is a security requirement associated with this solicitation. For additional information, see Part 4 - Evaluation Procedures and Basis of Selection, Part 6A - Supply Arrangement.

4. **Communications Notification**

As a courtesy, the Government of Canada requests that successful Suppliers notify the Arrangement Authority in advance of their intention to make public an announcement related to the issuance of a Supply Arrangement.

5. **Debriefings**

After issuance of all Supply Arrangements resulting from this solicitation, and also after each subsequent Supply Arrangement quarterly calendar year evaluation for which a Supplier has submitted an arrangement, a Supplier will be notified in writing regarding the outcome of their evaluation.   Suppliers should make a request for any additional debriefing to the Arrangement Authority within 15 working days of receipt of such written notification. The debriefing may be in writing, by telephone or in person.

PART 2 - SUPPLIER INSTRUCTIONS

1. **Standard Instructions, Clauses and Conditions**

All instructions, clauses and conditions identified in the Request for Supply Arrangements (RFSA) 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.

Suppliers who submit an arrangement agree to be bound by the instructions, clauses and conditions of the RFSA and accept the clauses and conditions of the Supply Arrangement and resulting contract(s).

The 2008 (2015-07-03) Standard Instructions - Request for Supply Arrangements - Goods or Services, are incorporated by reference into and form part of the RFSA.

Subsection 5.4 of 2008, Standard Instructions - Request for Supply Arrangements - Goods or Services, is amended as follows:

Delete: 60 days
Insert: 120 days

1.1 **Arrangement Participation**

Although this solicitation may result in a Supplier receiving a Supply Arrangement, a Supplier's arrangement must contain its response to all the requirements of this solicitation.   The arrangement may include an arrangement for some or all Regions, Metropolitan areas, Streams and/or Categories of Personnel; however, a Supplier may not submit a second arrangement for the same Regions, Streams and/or Categories of Personnel.

One legal entity may participate in the submission of:

     i.   one arrangement from the legal entity alone, or

ii. one arrangement from the legal entity and one arrangement submitted in a joint venture, or

iii. two arrangements submitted in joint venture. More than two arrangements generated from the same legal entity is not permitted in response to this solicitation. If a legal entity participates in more than two arrangements, Canada will choose in its discretion which two arrangements to consider. If a legal entity chooses to participate in two arrangements, each arrangement must be a physically separate document, clearly marked as a separate arrangement. Each arrangement will be evaluated independently without regard to other arrangements submitted and, therefore, every arrangement submitted must be complete.

2. **Submission of Arrangements**

Arrangements must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated on page 1 of the solicitation and electronically through the Data Collection Component of CPSS by the date and time as indicated on page one of the solicitation for the elements that must or may be submitted by electronic transmission.

3. **Enquiries - Request for Arrangements**

All enquiries must be submitted in writing to the Arrangement Authority no later than fifteen (15) calendar days before the solicitation closing date. Enquiries received after that time may not be answered.

Suppliers should reference as accurately as possible the numbered item of the solicitation to which the enquiry relates. Care should be taken by Suppliers 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 questions or may request that Suppliers do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all Suppliers. Enquiries not submitted in a form that can be distributed to all Suppliers may not be answered by Canada.

Where to direct enquiries: All enquiries and other communications with government officials relating to this quarterly refresh are to be directed ONLY to the following email address: ServicesApprentissageOCAMA-LearningServicesSOSA@tpsgc-pwgsc.gc.ca

4. **Applicable Laws**

A Supply Arrangement and any contract awarded under it, must be interpreted and governed, and the relations between the parties determined, by the laws in force in the Province of Ontario, Canada.

Suppliers may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their arrangement, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice in Attachment A to Component I - Supplier Profile. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Supplier.

PART 3 - ARRANGEMENT PREPARATION INSTRUCTIONS

1.   Arrangement Preparation Instructions

Canada requires that Suppliers provide their arrangement in hard copy and as electronic submission as identified in the Arrangement Submission Grid below.

Section I Technical Bid: Submitted through the Data Collection Component (DCC) of the Supplier's Module of the CPSS and one print copy and one soft copy on USB to the PWGSC Bid Receiving Unit, as detailed in Attachment C, Technical Response Template.

Section II Certification: For the Certifications as detailed in Component I, Part 5 and Attachment D, a Print copy of the Certification or submission through the DCC, as specified in the Arrangement Submission Grid at article 1.3 of Part 3 below.

Where information is required to be submitted in both Print copy and via the DCC, if there is a discrepancy between information received via the Data Collection Component and the Print (hard) copy, the Print copy will take precedence.

Canada requests that Suppliers follow the format instructions described below in the preparation of their arrangement.

> 1)   use 8.5 x 11 inch (216 mm x 279 mm) paper;
>
> 2)   use a numbering system that corresponds to that of the Request for Supply Arrangement.

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process, see the Policy on Green Procurement (http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html). To assist Canada in reaching its objectives, Suppliers should:

> 1)   use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
>
> 2)   use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.

1.1   Section I: Technical Arrangement

Suppliers must identify in their arrangement the Categories, Stream (s), Regions and Metropolitan area(s) for which they wish to be considered.

This solicitation will award Supply Arrangements based upon an evaluation that does not assess the personnel that may be provided by the Supplier after the issuance of a Supply Arrangement. As it does not require the submission of individual resources, resumes are not requested and should not be submitted with the arrangement.

1.2   Section II: Financial Bid

No financial evaluation of bids is required to be issued a Supply Arrangement.

1.3   Section III: Certifications

Suppliers should provide all the signed certifications required under Part 5.

1.4   Data Collection Component (DCC) of the Supplier's Module of the CPSS

In addition to submitting a print copy to the Bid Receiving Unit, Suppliers must submit their technical arrangements as specified in this Part 3 through the Data Collection Component of the Supplier's Module of CPSS.

To access the Data Collection Component:

1. Access the following CPSS link: http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spc-cps-eng.html
2. Enroll or login to the system. Suppliers must contact CPSS directly for enrollment questions or assistance.
3. Access this solicitation's Data Collection Component through the "Dashboard"
4. Enter all the required data into the Data Collection Component
5. Print the required parts of the Data Collection Component and submit with the hard copy of the arrangement by the closing date, time and location indicated on page one (1) of this solicitation. The Data Collection Component allows Suppliers to re-submit the electronic copy of the arrangement, replacing that Supplier's previous electronic copy of the arrangement up until the closing date and time of this solicitation.

1.5   Arrangement Submission Grid

The purpose of the following grid is to assist Suppliers with their arrangement preparation and submission. As the status and circumstances of each Supplier is unique, it is the responsibility of each Supplier to read all documents related to this solicitation and to ensure that all mandatory criteria, Certifications and elements required for arrangement validity are met in their submission. Where in the Submission Grid the symbol "&" is used, it means that the Supplier must submit the information requested through both methods.

The following terms are used below:

DCC: Indicates that the Supplier must input information, as applicable, into the "Data Collection Component: Suppliers' Module of CPSS"

Print: Indicates that the Supplier must print and sign the certification and submit it with the hard copy of the arrangement to the Bid Receiving Unit by the submission due date.

ADD: Indicates that the additional documentation is required to be submitted with the hard copy of the arrangement to the Bid Receiving Unit no later than the closing date identified in the RFSA.

A	B	C	D
	New Learning Services Supplier	**Existing Learning Services Supplier (inactive or active)** ****The Supplier is NOT changing the Technical Arrangement already on file from any previous Learning Services solicitation**	**Existing Learning Services Supplier (inactive or active)** ****The Supplier IS applying for additional Regions, Streams and/or Categories of resources**
SECTION I TECHNICAL ARRANGEMENT			
Region & Metropolitan Area selection	DCC	N/A	DCC if adding additional Regions or Metropolitan Areas
Mandatory M.1	DCC & ADD	N/A	DCC
Mandatory M.2 (a)	DCC & ADD	N/A	DCC & ADD
Mandatory M.2 (b)	DCC & ADD	N/A.	DCC & ADD
Mandatory M.2 (c)	DCC & ADD	N/A	DCC & ADD
Mandatory M.2 (d)	DCC & ADD	N/A	DCC & ADD
Mandatory M.2 (e)	DCC & ADD	N/A	DCC & ADD
Mandatory M.2 (f)	DCC & ADD	N/A	DCC & ADD
Mandatory M.2 (g)	DCC & ADD	N/A	DCC & ADD
Mandatory M.2 (h)	DCC & ADD	N/A	DCC & ADD
SECTION II FINANCIAL ARRANGEMENT (N/A)			
Not applicable for RFSA	N/A	N/A	N/A
SECTION III CERTIFICATIONS			
Supplier's Statement	DCC & Print (Attachment D)	N/A	DCC & Print (Attachment D)
Grandfather Certification	N/A	N/A	N/A
FCP EE Certification	DCC	N/A	DCC
Work Force Reduction Program Certification	DCC	N/A	DCC
Former Public Servant Certification	DCC	N/A	DCC
Aboriginal Business Certification	DCC	N/A	DCC
Code of Conduct Certification	DCC	N/A	DCC
Current Security Clearance and current Document Safeguarding Clearance	DCC	N/A	DCC

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures

Arrangements will be assessed in accordance with the entire requirement of the solicitation including the technical evaluation criteria. There are several steps in the evaluation methodology, which are described below. Even though the evaluation and selection will be conducted in steps, the fact that Canada has proceeded to a later step does not mean that Canada has conclusively determined that the Supplier has successfully passed all the previous steps. Canada may conduct steps of the evaluation in parallel.

An evaluation team composed of representatives of Canada will evaluate the arrangements. Canada may hire any independent consultant, or use any Government resources, to evaluate any arrangement. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.

If Canada seeks clarification or verification from the Supplier about its arrangement, the Supplier will have two working days (or a longer period if specified in writing by the Supply Arrangement Authority) to provide the necessary information to Canada. Failure to meet this deadline will result in the arrangement being declared non-responsive, unless the Supply Arrangement Authority grants an extension in his or her sole discretion.

1.1. Technical Evaluation

The mandatory technical evaluation criteria for the provision of a Supply Arrangement are included in Attachment B, Supply Arrangement Technical Evaluation.

1.2 Financial Evaluation

There is no financial evaluation required to be issued a Supply Arrangement.

2. Basis of Selection

All elements of the solicitation that are mandatory requirements are identified specifically with the words "must" or "mandatory". Arrangements that do not comply with each and every mandatory requirement applicable to the Request for Supply Arrangement will be considered non compliant. The evaluation steps are as follows:

> **Step 1 – Technical Evaluation:** Each arrangement will be reviewed to determine if it contains an arrangement for a Supply Arrangement that meets the mandatory requirements of Attachment B, Supply Arrangement Technical Evaluation.
>
> An arrangement must comply with the requirements of the solicitation and meet all mandatory requirements of Attachment B to be declared compliant to the requirement for a Supply Arrangement.
>
> **Step 2 – Financial Evaluation:** N/A
>
> **Step 3 - Selection and Issuance of Supply Arrangements**:
>
> Each technically compliant arrangement will be recommended for the issuance of a Supply Arrangement on the terms stated in Component II.
>
> Where an Aboriginal Supplier qualifies for an Aboriginal and Non-Aboriginal Supply Arrangement, only one Supply Arrangement will be awarded.

3.   Security Requirement

Before issuance of a Supply Arrangement, the Supplier must hold a valid organization security clearance as indicated in Part 6A - Supply Arrangement.

Canada will not delay the issuance of any Supply Arrangement to allow Suppliers to obtain the required clearance; however, should a Supplier receive its required clearance while all other requirements of the solicitation have been met and its arrangement is still valid, Canada will consider awarding a Supply Arrangement to that Supplier.

Suppliers may request that the Supply Arrangement Authority consider security sponsorship of their candidacy to upgrade it to the next security level that is above the Supplier's current security level or to seek initial DOS clearance. Such sponsorship is only available for one level of upgrade at a time. This request may be made at any time before or after the solicitation closing date by sending the request via email to the attention of the Supply Arrangement Authority.

For additional information on security requirements, Suppliers should consult the "**Common Centralized Professional Services: Security Requirement Checklists (SRCLs)**" (http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/31-eng.html) document on the Departmental Standard Procurement Documents Web site.

4.   Financial Viability

4.1   The Supplier must be financially viable to fulfill this requirement. To determine the Supplier's financial viability, the Supply Arrangement Authority may, by written notice to the Supplier, require the submission of some or all of the financial information detailed below during the evaluation of arrangement. The Supplier must provide the following information to the Supply Arrangement Authority within fifteen (15) working days of the request or as specified by the Supply Arrangement Authority in the notice:

   a) Audited financial statements, if available, or the unaudited financial statements (prepared by the Supplier's outside accounting firm, if available, or prepared in-house if no external statements have been prepared) for the Supplier's last three fiscal years, or for the years that the Supplier has been in business if this is less than three years (including, as a minimum, the Balance Sheet, the Statement of Retained Earnings, the Income Statement and any notes to the statements).

   b) If the date of the financial statements in (a) above is more than five months before the date of the request for information by the Supply Arrangement Authority, the Supplier must also provide, unless this is prohibited by legislation for public companies, the last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement), as of two months before the date on which the Supply Arrangement Authority requests this information.

   c) If the Supplier has not been in business for at least one full fiscal year, the following must be provided:

      i.   the opening Balance Sheet on commencement of business (in the case of a corporation, the date of incorporation); and

      ii.   the last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement) as of two months before the date on which the Supply Arrangement Authority requests this information.

d) A certification from the Chief Financial Officer or an authorized signing officer of the Supplier that the financial information provided is complete and accurate.

4.2 If the Supplier is a joint venture, the financial information required by the Supply Arrangement Authority must be provided by each member of the joint venture.

4.3 If the Supplier is a subsidiary of another company, then any financial information in 4.1 (a) to (d) above required by the Supply Arrangement Authority must also be provided by the ultimate parent company.

4.4 Financial Information Already Provided to Public Works and Government Services Canada (PWGSC): The Supplier is not required to resubmit any financial information requested by the Supply Arrangement Authority that is already on file at PWGSC with the Contract Cost Analysis, Audit and Policy Directorate of the Policy, Risk, Integrity and Strategic Management Sector, provided that within the above-noted time frame:

a) the Supplier identifies to the Supply Arrangement Authority in writing the specific information that is on file and the requirement for which this information was provided; and

b) the Supplier authorizes the use of the information for this requirement.

It is the Supplier's responsibility to confirm with the Supply Arrangement Authority that this information is still on file with PWGSC.

4.5 Other Information: Canada reserves the right to request from the Supplier any other information that Canada requires to conduct a complete financial viability assessment of the Supplier. The Supplier also understands that a complete financial capability review of the Supplier may also be conducted at the time individual bid solicitations are issued under the Supply Arrangement.

4.6 Confidentiality: If the Bidder provides the information required above to Canada in confidence while indicating that the disclosed information is confidential, then Canada will treat the information in a confidential manner as permitted by the Access to Information Act, R.S., 1985, c. A-1, Section 20(1) (b) and (c).

5. Insurance Requirement

The bidder must provide a letter from an insurance broker or an insurance company licensed to operate in Canada stating that the bidder, if issued a Supply Arrangement as a result of the bid solicitation, can be insured in accordance with the Insurance Requirements specified in Annex "C".

PART 5 - CERTIFICATIONS

Suppliers must provide the required certifications and associated information to be issued a supply arrangement (SA).

The certifications provided by suppliers to Canada are subject to verification by Canada at all times. Canada will declare an arrangement non-responsive, or will declare a contractor in default in carrying out any of its obligations under any resulting contracts, if any certification made by the Supplier is found to be untrue whether made knowingly or unknowingly during the arrangement evaluation period, or during the period of any supply arrangement arising from this RFSA and any resulting contracts.

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

Joint Venture (JV) Arrangements: Except where expressly provided otherwise, any certifications required to be made by the Supplier must be made by the lead member on behalf of the JV.

1.   Certifications Precedent to Issuance of a Supply Arrangement

The following certification must be signed and submitted with the hard copy of the arrangement to the Bid Receiving Unit by the date, time, and location indicated on page one of this solicitation.

The Supplier's Statement (All Suppliers who bid for this quarterly refresh) - see Attachment D of this solicitation.

The following certifications should be provided through the Data Collection Component, but may be submitted afterwards either electronically or in hard copy. If any of these required certifications are not completed and submitted as requested, the Supply Arrangement Authority will so inform the Supplier and provide the Supplier with a time frame within which to meet the requirement. Failure to comply with the request of the Supply Arrangement Authority and meet the requirements within that time period will render the bid non-responsive.

1.1   Integrity Provisions - Associated Information

By submitting an arrangement, the Supplier certifies that the Supplier and its Affiliates are in compliance with the provisions as stated in Section 01 Integrity Provisions - Arrangement of the Standard Instructions. 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

By submitting an arrangement, the Supplier certifies that the Supplier, and any of the Supplier's members if the Supplier 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-Labour's website.

Canada will have the right to declare an arrangement non-responsive, or to set-aside a Supply Arrangement, if the Supplier, or any member of the Supplier, if the Supplier is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list at the time of issuing of a Supply Arrangement or during the period of the Supply Arrangement.

1.3 Set-Aside for Aboriginal Business

This procurement is set aside under the federal government's Procurement Strategy for Aboriginal Business, as detailed in Annex 9.4: Requirements for the Set-aside Program for Aboriginal Business, of the Supply Manual.

The Supplier:

   i.   certifies that it meets, and will continue to meet throughout the duration of any resulting contract, the requirements described in the above-mentioned annex.

   ii.   agrees that any subcontractor it engages under any resulting contract must satisfy the requirements described in the above-mentioned annex.

   iii. agrees to provide to Canada, immediately upon request, evidence supporting any subcontractor's compliance with the requirements described in the above-mentioned annex.

The Supplier must check the applicable box below:

   i.   ( ) The Supplier is an Aboriginal business that is a sole proprietorship, band, limited company, co-operative, partnership or not-for-profit organization.

OR

   ii.   ( ) The Supplier is either a joint venture consisting of two or more Aboriginal businesses or a joint venture between an Aboriginal business and a non-Aboriginal business.

The Supplier must check the applicable box below:

   i.   ( ) The Aboriginal business has fewer than six full-time employees.

OR

   ii.   ( ) The Aboriginal business has six or more full-time employees.

The Supplier must, upon request by Canada, provide all information and evidence supporting this certification. The Supplier must ensure that this evidence will be available for audit during normal business hours by a representative of Canada, who may make copies and take extracts from the evidence. The Supplier must provide all reasonably required facilities for any audits.

By submitting an arrangement, the Supplier certifies that the information submitted by the Supplier in response to the above requirements is accurate and complete.

If requested by the Supply Arrangement Authority, the Supplier must provide the following certification for each owner and employee who is Aboriginal:

1. I am _____ (insert "an owner" and/or "a full-time employee") of _____ (insert name of business), and an Aboriginal person, as defined in Annex 9.4 of the Supply Manual entitled "Requirements for the Set-Aside Program for Aboriginal Business".

2. I certify that the above statement is true and consent to its verification upon request by Canada.

_____

Printed name of owner and/or employee

_____

Signature of owner and/or employee

_____

Date

The Contractor warrants that its certification of compliance is accurate and complete and in accordance with the "Requirements for the Set-aside Program for Aboriginal Business" detailed in Annex 9.4 of the Supply Manual.

The Contractor must keep proper records and documentation relating to the accuracy of the certification provided to Canada. The Contractor must obtain the written consent of the Contracting Authority before disposing of any such records or documentation before the expiration of six (6) years after final payment under the Contract, or until settlement of all outstanding claims and disputes, under the Contract, whichever is later. All such records and documentation must at all times during the retention period be open to audit by the representatives of Canada, who may make copies and take extracts. The Contractor must provide all reasonably required facilities for any audits.

Nothing in this clause must be interpreted as limiting the rights and remedies which Canada may otherwise have pursuant to the Contract.

ATTACHMENT A

SUPPLIER PROFILE /
CENTRALIZED PROFESSIONAL SERVICES SYSTEM (CPSS) SUPPLIER MODULE ENROLLMENT

Suppliers must enter the "Company Information" in the Data Collection Component (DCC) of CPSS.

To access CPSS, follow the link: http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spc-cps-eng.html

ATTACHMENT B
SUPPLY ARRANGEMENT TECHNICAL EVALUATION

	Description of Criteria	Bid Preparation Instructions
M.1	**Minimum years in business:** The Bidder must have carried on business as the same legal entity for a minimum of three (3) years as of the <u>bid closing date of the Solicitation</u>. In case of a joint venture, <u>at least one (1) member</u> of the joint venture must meet the minimum three-year requirement as of the closing date of the Solicitation.	The following information **must**, as a minimum, be provided: Legal documents (e.g. Incorporation certificate, business registration or tax returns) confirming the number of years the firm has been in business. If the Supplier legal entity has been incorporated or otherwise created less than 3 years before bid closing as the result of a corporate change under which it has, in law, assumed all of the assets, undertaking, operational capability, skills and resources of other legal entities, then Canada will consider the 3 year minimum requirement to be met if the Supplier legal entity demonstrates to Canada's satisfaction that: a) the Supplier legal entity has been incorporated or otherwise created as the result of a corporate change under which it has in law assumed all of the assets, undertaking, operational capability, skills and resources of other legal entities; b) each of the other legal entities carried on business, uninterrupted and in the normal course, for at least 3 years before the corporate change; c) the Supplier legal entity has carried on the business of all of the other legal entities in the normal course, uninterrupted from and after the date of the corporate change; d) the corporate change was solely for tax or other purposes unrelated to the business of the other legal entities and does not affect the ability of the Supplier legal entity to carry on the business that had been carried on by the other legal entities; and e) the Supplier legal entity, as of the date of bid closing, maintains the same assets, undertaking, operational capability, skills and resources as the other legal entities had maintained before the corporate change. In these circumstances, Canada may require from the Supplier an unqualified legal opinion from an independent law firm stating that the supplier legal entity meets all of the above requirements. Canada reserves the right to require other detail and material to verify that the above requirements

		are met. If Canada is not satisfied that the above requirements have been met, the Supplier legal entity's arrangement will be considered non-compliant. Canada reserves the right to request proof of any information provided by the Supplier. If the information cannot be validated, the Supplier's arrangement will be considered non-compliant.
M.2	**Streams of Service** For the stream(s) that the Supplier wants to provide services under, the Supplier must provide the following:	
M.2(a)	**Stream 1 – Strategic Learning Advisory Services**	
	The Supplier must have billed a total cumulative dollar value of $**150,000** (GST/HST excluded) in Strategic Advisory Services for Training similar in nature to those described in Annex "A" Requirements to Outside Clients** within the last five (5) years (as of bid posting). The following information **must**, as a minimum, be provided: Name of the Joint-venture member for the referenced project (if applicable); Name of Client Organization; Brief description of the Scope and Objective of the project to clearly show relevancy of the project; Start and End dates of the project (from-to dates in month/year). If the project was completed in the month/year that the RFSA is closing, provide day/month/year to demonstrate that the project is completed at the date of your bid or the bid closing date whichever comes first; and Project value – total amount invoiced in Instructional Design and Development costs for the project.	The following information **should,** as a minimum, be provided for each of the projects cited: Name of the client reference; and Telephone number, fax number, and e-mail address of the client reference.
M.2(b)	**Stream 2 - Instructional Design and Development Services**	
	The Supplier must have billed a total cumulative dollar value of **$300,000** (GST/HST excluded) in Instructional Design and Development Services of traditional learning and/or eLearning Products similar in nature to those described in Annex "A" Requirements to Outside Clients** within the last five (5) years (as of bid posting). The following information **must**, as a minimum, be provided:	The following information **should,** as a minimum, be provided for each of the projects cited: Name of the client reference; Telephone number, fax number, and e-mail address of the client reference. NOTE - For Stream 2, bidders are required to offer services for both Instructional Designer and Technical Writer. Bidders who do not offer both Categories will be deemed non-compliant. Subject Matter Expert is an optional Category under Stream 2 that does not require substantiation by project summary. Suppliers must be

	Name of the Joint-venture member for the referenced project (if applicable); Name of Client Organization; Brief description of the Scope and Objective of the project to clearly show relevancy of the project; Start and End dates of the project (from-to dates in month/year). If the project was completed in the month/year that the RFSA is closing, provide day/month/year to demonstrate that the project is completed at the date of your bid or the bid closing date whichever comes first; and Project value – total amount invoiced in Instructional Design and Development costs for the project.	deemed compliant in both Instructional Designer and Technical Writer and must request pre-qualification under the Subject Matter Expert category in order to be eligible to qualify under the Subject Matter Expert category.
	The Supplier must have billed a total cumulative dollar value of $**100,000** (GST/HST excluded) in Technical Writing services similar in nature to those described in Annex "A" Requirements to Outside Clients** within the last five (5) years (as of bid posting). The following information **must**, as a minimum, be provided: Name of the Joint-venture member for the referenced project (if applicable); Name of Client Organization; Brief description of the Scope and Objective of the project to clearly show relevancy of the project; Start and End dates of the project (from-to dates in month/year). If the project was completed in the month/year that the RFSA is closing, provide day/month/year to demonstrate that the project is completed at the date of your bid or the bid closing date whichever comes first; and Project value – total amount invoiced in Instructional Design and Development costs for the project.	The following information **should,** as a minimum, be provided for each of the projects cited: Name of the client reference; Telephone number, fax number, and e-mail address of the client reference.
M.2(c)	**Stream 3 – Custom Elearning Product Programming**	
	The Supplier must have billed a total cumulative value of **$300,000** (GST/HST excluded) in Elearning Product Programming Services similar in nature to those described in Annex "A" Requirements to Outside Clients** within the last five (5) years (as of bid posting).	The following information **should,** as a minimum, be provided for each of the projects cited: Name of the client reference; and Telephone number, fax number, and e-mail address of the client reference.

	The following information **must**, as a minimum, be provided: Name of the Joint-venture member for the referenced project (if applicable); Name of Client Organization; Brief description of the Scope and Objective of the project to clearly show relevancy of the project; Start and End dates of the project (from-to dates in month/year). If the project was completed in the month/year that the RFSA is closing, provide day/month/year to demonstrate that the project is completed at the date of your bid or the bid closing date whichever comes first; and Project value – total amount invoiced in Elearning Product Programming costs for the project.	
M.2(d)	**Stream 4 – Rapid eLearning Product Programming**	

	The Supplier must have billed a total cumulative value of **$150,000** (GST/HST excluded) in Rapid eLearning Product Programming Services similar in nature to those described in Annex "A" Requirements to Outside Clients** within the last five (5) years (as of bid posting).
	
	The following information **must**, as a minimum, be provided:
	
	  Name of the Joint-venture member for the referenced project (if applicable);
	 Name of Client Organization;
	  Brief description of the Scope and Objective of the project to clearly show relevancy of the project;
	 Start and End dates of the project (from-to dates in month/year). If the project was completed in the month/year that the RFSA is closing, provide day/month/year to demonstrate that the project is completed at the date of your bid or the bid closing date whichever comes first; and
	 Project value – total amount invoiced in eLearning Product Programming costs for the project.
		The following information **should,** as a minimum, be provided for each of the projects cited:
		
		Name of the client reference; and
		Telephone number, fax number, and e-mail address of the client reference.

M.2(e)	**Stream 5 – Quality Assurance**	
	The Supplier must have billed a total cumulative value of **$50,000** (GST/HST excluded) in Quality Assurance Services on eLearning Product(s) similar in nature	The following information **should,** as a minimum, be provided for each of the projects cited: Name of the client reference; and

	to those described in Annex "A" to Outside Clients** within the last five (5) years (as of bid posting). The following information **must**, as a minimum, be provided: Name of the Joint-venture member for the referenced project (if applicable); Name of Client Organization; Brief description of the Scope and Objective of the project to clearly show relevancy of the project; Start and End dates of the project (from-to dates in month/year). If the project was completed in the month/year that the RFSA is closing, provide day/month/year to demonstrate that the project is completed at the date of your bid or the bid closing date whichever comes first; and Project value – total amount invoiced in Quality Assurance on eLearning Product(s) costs for the project.	Telephone number, fax number, and e-mail address of the client reference.
M.2(f)	**Stream 6 - Multi-Media Design and Development**	
	The Supplier must have billed a total cumulative value of $300,000 (GST/HST excluded) in Multi-Media Design and Development Services for traditional learning and/or eLearning Products similar in nature to those described in Annex "A" to Outside Clients** within the last five (5) years (as of bid posting). The following information **must**, as a minimum, be provided: Name of the Joint-venture member for the referenced project (if applicable); Name of Client Organization; Brief description of the Scope and Objective of the project to clearly show relevancy of the project; Start and End dates of the project (from-to dates in month/year). If the project was completed in the month/year that the RFSA is closing, provide day/month/year to demonstrate that the project is completed at the date of your bid or the bid closing date whichever comes first; and Project value – total amount invoiced in Multi-media Design and Development Services costs for the project.	The following information **should,** as a minimum, be provided for each of the projects cited: Name of the client reference; Telephone number, fax number, and e-mail address of the client reference.
M.2(g)	**Stream 7 - Project Management**	

	The Supplier must have billed a total cumulative value of $150,000 (GST/HST excluded) in Project Management Services for traditional learning and/or eLearning Products similar in nature to those described in Annex "A" Requirement to Outside Clients within the last five (5) years (as of bid posting). The following information **must**, as a minimum, be provided: Name of the Joint-venture member for the referenced project (if applicable); Name of Client Organization; Brief description of the Scope and Objective of the project to clearly show relevancy of the project; Start and End dates of the project (from-to dates in month/year). If the project was completed in the month/year that the RFSA is closing, provide day/month/year to demonstrate that the project is completed at the date of your bid or the bid closing date whichever comes first; and i. Project value – total amount invoiced in Project Management Services costs for the project.	The following information **should,** as a minimum, be provided for each of the projects cited: Name of the client reference; and Telephone number, fax number, and e-mail address of the client reference.
M.2(h)	**Stream 8 – Training Delivery**	
	The Supplier must have billed a total cumulative value of $150,000 (GST/HST excluded) in providing Instructors, and/or Training Facilitators similar in nature to those described in Annex "A" Requirements to Outside Clients** within the last five (5) years (as of bid posting). The following information **must**, as a minimum, be provided: Name of the Joint-venture member for the referenced project (if applicable); Name of Client Organization; Brief description of the Scope and Objective of the project to clearly show relevancy of the project; Start and End dates of the project (from-to dates in month/year). If the project was completed in the month/year that the RFSA is closing, provide day/month/year to demonstrate that the project is completed at the date of your bid or the bid closing date whichever comes first; and	The following information **should,** as a minimum, be provided for each of the projects cited: Name of the client reference; and Telephone number, fax number, and e-mail address of the client reference.

	Project value – total amount invoiced in Instructing and/or Training Facilitation costs for the project.	

ATTACHMENT C
TECHNICAL RESPONSE TEMPLATE / CPSS SUPPLIER MODULE - DATA COLLECTION COMPONENT (DCC)

The Data Collection Component of CPSS can be accessed through the CPSS website:
Http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spc-cps-eng.html

In addition to submitting a print copy to the Bid Receiving Unit, Suppliers must submit their technical arrangements as specified in this Part 3 through the Data Collection Component of the Supplier's Module of CPSS.

Note to Suppliers:

The metropolitan areas and the regions are independent from one another and care should be taken when making a selection.

By selecting "all Regions and Metropolitan areas" in the DCC, the Supplier is selecting all possible regions and metropolitan areas including the Remote/Virtual Zone (formerly known as the "National Zone").

By selecting "Remote/Virtual Zone" in the DCC, the Supplier is not automatically selecting all Regions and/or Metropolitan Areas; the Supplier is only selecting the zone known as "Remote/Virtual Zone".

For example, when an Identified User of CPSS runs a search under the "Remote/Virtual Zone", they are indicating that the work is to be performed at the Contractor's location and is not required to be performed in any specific geographic location. One possible scenario is that the Identified User for whom the work is performed is in Halifax, while the Contractor could be located in Vancouver and no travel is required on the Contractor's behalf.

By selecting "Region" in the DCC, the Supplier is not automatically selecting the Metropolitan areas within that Region.

For example, if you wish to offer services in the Atlantic Region, including the metropolitan areas of Halifax and Moncton, then you must select all of them in the DCC (i.e.: the Atlantic Region, the Halifax metropolitan area, and the Moncton metropolitan area). A Supplier who indicates in the DCC that they want to provide services to the Atlantic Region but does not select Halifax or Moncton, will result in their company not appearing on any search result lists where the Identified User of CPSS runs the search under the metropolitan areas of Halifax or Moncton.

"Definitions of the Remote/Virtual Zone, Regions and Metropolitan Areas" can be found here:
http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/dznrrm-dnzrma-eng.html

ATTACHMENT D

**CERTIFICATION RESPONSE TEMPLATE /
CENTRALIZED PROFESSIONAL SERVICES SYSTEM (CPSS) SUPPLIER MODULE DATA
COLLECTION COMPONENT**

The relevant information for each Certification is located in Component I, Part 5 and in the CPSS Data Collection Component - Certifications.

SUPPLIER STATEMENT (ALL SUPPLIERS)

All Suppliers must sign and submit the following "Supplier's Statement" with the hard copy of their arrangement to the Bid Receiving Unit by the date and time of the date of bid submission:

We certify that all statements made with regard to these requirements are accurate and factual, and we are aware that the Department of Public Works and Government Services Canada reserves the right to verify any information provided in this regard. Untrue statements may result in the Supplier's arrangement being declared non-compliant in its entirety, current Learning Services SA Holders becoming ineligible to receive further solicitations, and any other action which Canada may consider appropriate.

SIGNATURE: _____ DATE: _____

Print Name: _____

Legal Name of Supplier: _____
(ALL SUPPLIERS: Print, sign, and submit this certification with the hard copy of your arrangement)

PART 6 - SUPPLY ARRANGEMENT AND RESULTING CONTRACT CLAUSES

A.   SUPPLY ARRANGEMENT

1.   Arrangement

The Supply Arrangement covers the Work described in Annex A Requirements for Services

2.   Security Requirement

The Supplier must meet the minimum security requirement as specified below, in order to remain a Supplier under the Supply Arrangement.   The Supply Arrangement authority may verify the Supplier's security clearance with the CISD, PWGSC at any time during the life of the Supply Arrangement.

SECURITY REQUIREMENT FOR CANADIAN SUPPLIER: PWGSC FILE COMMON-PS-SRCL#2

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 sensitive work site(s) must EACH hold a valid **RELIABILITY STATUS**, granted or approved by CISD/PWGSC.
3. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
4. The Contractor/Offeror must comply with the provisions of the:
    a. Security Requirements Check List and security guide (if applicable), attached at Annex _____;
    b. *Industrial Security Manual* (Latest Edition).

The requirements to be procured under this Supply Arrangement may be subject to a security requirement. The possible security requirements are identified within the Security requirement Check List (SRCL) at the following link http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/31-1-eng.html#srcl2 and as identified in Annex "B" to Component II.   Each bid solicitation will identify the SRCL that will apply to any resulting contract.

 In the case of Joint Ventures, for any given resulting contract the highest level of corporate security attainable through CISD is the lowest level held by any single member of the JV. For example: a Joint Venture with five (5) members is comprised of four members holding a valid Facility Security Clearance (FSC) at the Secret level and one member holding a valid Designated Organization Screening (DOS). The highest corporate security level for which the Joint Venture would be considered under this SA framework would be DOS, until such time as the member holding a valid DOS clearance has requested sponsorship via the Supply Arrangement Authority and obtained a valid FSC at the secret level issued by CISD.

3.   Standard Clauses and Conditions

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

3.1   General Conditions

2020 (2015-09-03) General Conditions - Supply Arrangement - Goods or Services, apply to and form part of the Supply Arrangement.

3.2 Supply Arrangement Reporting

The "Active" Supplier must compile and maintain records on its provision of services to the federal government under contracts resulting from the Supply Arrangement. This data must include all purchases paid for by a Government of Canada Acquisitions Card.

Canada will provide a report template (Annex H) which must be submitted at the end of each quarter. All data fields of the report must be completed as requested. If some data is not available, the reason must be indicated in the report. If no services are provided during a given period, the Supplier must still provide a "NIL" report.

The data must be submitted on a quarterly basis to the Supply Arrangement Authority. Electronic reports must be completed and forwarded to the Supply Arrangement Authority no later than 15 calendar days after the end of the quarterly period.

The Quarterly periods are defined as follows:

Quarter	Period to be Covered	Due on or before
1st	April 1 to June 30	July 15
2nd	July 1 to September 30	October 15
3rd	October 1 to December 31	January 15
4th	January 1 to March 31	April 15

Failure to provide fully completed reports in accordance with the above instructions may result in the setting aside of the Supply Arrangement and the application of a vendor performance corrective measure.

4. Term of Supply Arrangement

4.1 Period of the Supply Arrangement

The period for awarding contracts under the Supply Arrangement is from date of issuance of the SA to December 31, 2016.

5. Authorities

5.1 Supply Arrangement Authority

The Supply Arrangement Authority is:

Name: Jean-Sébastien Deslauriers
Title: Supply Team Leader
Department: Public Works and Government Services Canada
Branch: Acquisitions Branch
Directorate: Professional Services Procurement Directorate
Address: 11 Laurier Street
                        Gatineau, QC
                        K1A 0S5

Telephone: 819-934-1423
Facsimile: 819-956-2675
E-mail address: jean-sebastien.deslauriers@tpsgc-pwgsc.gc.ca

The Supply Arrangement Authority is responsible for the issuance of the Supply Arrangement, its administration and its revision, if applicable. Upon the issuance of a bid solicitation under the Supply Arrangement, that solicitation's Contracting Authority is responsible for any contractual issues relating to the contract solicited. Any changes to the Supply Arrangement must be authorized in writing by the Supply Arrangement Authority.

5.2 Supplier's Representative

This individual is the central point of contact within the Supplier for all matters pertaining to this Supply Arrangement. The Supplier confirms that this individual has the authority to bind the Supplier. It is the Supplier's sole responsibility to ensure that the information related to the Supplier Representative is correct and to inform the SA Authority of any change to it.

Name:
Title:
Telephone:
Facsimile:
Address:
Email:

[Note to Supplier: This information is as per your arrangement and is available to Clients via the Centralized Professional Services System (CPSS) website]

The Supplier's Representative may delegate to another individual to represent the Supplier for administrative and technical purposes under any contract resulting from this Supply Arrangement.

6. Identified Users

The Identified Users include any government department, agency or Crown Corporation listed in Schedules I, I.1, II, III, IV, and V of the Financial Administration Act, R.S., 1985, c. F-11 and any other party for which the Department of Public Works and Government Services has been authorized to act from time to time under section 16 of the *Department of Public Works and Government Services Act*.

Canada may, at any time, withdraw authority from any of the Identified Users to use the Supply Arrangement.

7. On-going Opportunity for Qualification

Evaluations of arrangements will start on a quarterly basis. Canada will endeavor to evaluate in each quarter those submissions received by the beginning of such quarter as identified below.

It is important to note that suppliers will not be eligible to bid each quarter. For example, if a supplier submits an arrangement in quarter 1, the supplier will not be eligible to bid in quarter 2 as their profile will be disabled in the data collection component while the bid is under evaluation. This will in no way impact the search results for an existing supplier's current arrangement.

A supplier may choose to submit a quarterly arrangement containing an entirely new arrangement, or may propose to modify its existing arrangement by adding or removing Categories. Participation in a quarterly evaluation is entirely optional and not required to maintain any Learning Services Arrangement.

All arrangements whether issued quarterly (refresh solicitation) or as the result of an arrangement submitted on the bid closing date of a renewal solicitation will be replaced when a renewal solicitation occurs.

Therefore, all Suppliers must submit an arrangement before the closing date of a renewal solicitation in order to continue to provide services under its resulting Supply Arrangement.

Suppliers should refer to the "Anticipated Solicitations" on the CPSS Dashboard for updates to the refresh schedule. https://sspc-fournisseur-cpss-supplier.tpsgc-pwgsc.gc.ca/VoirTableauDeBordPublique-ViewPublicDashboard-Eng

8. 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.

i. the articles of the Supply Arrangement;
ii. the general conditions 2020 (2015-09-03), General Conditions - Supply Arrangement - Goods or Services;
iii. Annex A, Requirements for Services;
iv. Annex B, Generic Security Requirement Check Lists;
v. Annex C, Insurance Requirements; and
vi. the Supplier's arrangement dated _____

9. Certifications

9.1 Compliance

Compliance with the certifications provided by the Supplier in the arrangement is a condition of the Supply Arrangement (SA) and subject to verification by Canada during the term of the SA and of any resulting contract that would continue beyond the period of the SA. If the Supplier does not comply with any certification or it is determined that any certification made by the Supplier in the arrangement untrue, whether made knowingly or unknowingly, Canada has the right to terminate any resulting contract for default and suspend or cancel the SA.

10. Applicable Laws

The Supply Arrangement (SA) and any contract resulting from the SA must be interpreted and governed, and the relations between the parties determined, by the laws in force in the Province of Ontario, Canada unless otherwise stipulated in the Supplier's arrangement in response to the RFSA.

11. Suspension or Cancellation of Qualification by Canada

In addition to the circumstances identified in 2020 (2015-09-03) 09, Canada may, by sending written notice to the Supplier, suspend or cancel the Supply Arrangement where the Supplier has made public any information that conflicts with the terms, conditions, pricing or availability of systems identified in this Supply Arrangement, or where the Supplier is in default in carrying out any of its obligations under this Supply Arrangement.

12. Vendor Performance

Canada may verify compliance with the conditions of the Supply Arrangement at any time during the Supply Arrangement and failure to meet any of these conditions constitutes grounds for the suspension and/or cancellation of this Supply Arrangement.

The following is not an exhaustive list of examples of situations which may result in the suspension and/or cancellation of this Supply Arrangement, which include:

(i)   Late deliveries;

(ii)   Failure to submit complete and accurate Quarterly Usage Reports within the required time frames;

(iii) Violation of any of the specific terms and conditions detailed in the Supply Arrangement (e.g. failure to meet the minimum RFSA requirements, failure to respect the contract, etc.);

(iv)   Canada has terminated any contract resulting from the Supply Arrangement for default;

(v)   Canada has imposed measures on the Supplier under the PWGSC Vendor Performance Policy (or such similar policy as may be in place from time to time);

(vi)   Distribution or publication of information that conflicts with any aspect of the terms and conditions, pricing, or availability of systems currently listed in this Supply Arrangement;

(vii) Canada has documented an instance of poor performance under contracts awarded issued against the Supply Arrangement. An instance of poor performance may include, but is not limited to, failed delivery of reports or services including the required number of skilled resources, lack of timely notification given to the PWGSC Supply Arrangement Authority of changes in the Supplier's Authorized Representative, insurance coverage or security status, or non-compliance with invoicing procedures.

Suspension or cancellation of the Supply Arrangement does not affect the right of Canada to pursue other remedies or measures that may be available.

The Supplier acknowledges that Canada may publish information regarding the status of the Supplier's Arrangement, including the suspension or cancellation of the Supplier's Supply Arrangement.

The Supplier acknowledges that Canada will implement an Assessment Framework for Learning Services Applicable to Identified Users and Suppliers which is part of the commitment of PWGSC to enhance the integrity, transparency and efficiency of the government contracting process, the use of automated procurement tools developed for Identified Users, which is subject to ongoing assessment. Results from an assessment could also lead to Sanctions, e.g. loss of access by an Identified User; or a Supply Arrangement is cancelled

13.   Aboriginal Business Certification (if applicable)

The Supplier warrants that its certification of compliance is accurate and complete and in accordance with the "Requirements for the Set-aside Program for Aboriginal Business" detailed in Annex 9.4 of the Supply Manual.

The Supplier must keep proper records and documentation relating to the accuracy of the certification provided to Canada. The Contractor must obtain the written consent of the Contracting Authority before disposing of any such records or documentation before the expiration of six (6) years after final payment under the Contract, or until settlement of all outstanding claims and disputes, under the Contract, whichever is later. All such records and documentation must at all times during the retention period be open to audit by the representatives of Canada, who may make copies and take extracts. The Supplier must provide all reasonably required facilities for any audits.

Nothing in this clause must be interpreted as limiting the rights and remedies which Canada may otherwise have pursuant to the Contract.

14.   Delivery Requirements outside a Comprehensive Land Claims Settlement Area

The resulting Supply Arrangement is not to be used for deliveries within a Comprehensive Land Claims Settlement Area (CLCSA). All requirements for delivery within a CLCSA are to be submitted to the Department of Public Works and Government Services for individual processing.

15. Insurance

The Supplier must comply with the insurance requirements specified in Annex C. The Supplier must maintain the required insurance coverage for the duration of the Supply Arrangement. Compliance with the insurance requirements does not release the Supplier from or reduce its liability under the Supply Arrangement.

The Supplier is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Supply Arrangement and to ensure compliance with any applicable law. Any additional insurance coverage is at the Supplier's expense, and for its own benefit and protection.

The Supplier must forward to the Supply Arrangement Authority within ten (10) days after the date of award of the Supply Arrangement, a Certificate of Insurance evidencing the insurance coverage and confirming that the insurance policy complying with the requirements is in force. Coverage must be placed with an Insurer licensed to carry out business in Canada. The Supplier must, if requested by the Supply Arrangement Authority, forward to Canada a certified true copy of all applicable insurance policies.

16. Environmental Considerations

As of April 2006, the Government of Canada issued a policy directing federal departments and agencies to take the necessary steps to acquire products and services that have a lower impact on the environment than those traditionally acquired. The environmental impact assessment of a product and/or service considers the whole life cycle of the product and/or service. Hence, in the near future, all government procurement will include more demanding environmental criteria to encourage product/service Suppliers to improve their operations to reduce their negative impact on the environment.

16.1 Environmental Properties Behaviour Recommended

- Provide and transmit draft reports, final reports and bids in electronic format. Should printed material be required, double sided printing in black and white format is the default unless otherwise specified by the Project Authority.
- Printed material is requested on minimum recycled content of 30% and/or certified as originating from a sustainably managed forest.
- Recycle unneeded printed documents (in accordance with Security Requirements). Travel requirements:
- Project Authority is encouraged to use video and/or teleconferencing where possible to cut down unnecessary travel.
- Use of Properties with Environmental Ratings: Contractors to the Government of Canada may access the PWGSC Accommodation directory, which includes Eco-Rated properties. When searching for accommodation, contractors can go to the following link and search for properties with Environmental Ratings, identified by Green Keys or Green Leafs that will honour the pricing for contractors: http://rehelv-acrd.tpsgc-pwgsc.gc.ca/rechercher-search-eng.aspx
- Use of public/green transit where feasible.

6B.   BID SOLICITATION

1.   Bid Solicitation Documents

Canada will use the Standard Procurement Templates available in buyandsell.gc.ca:
https://buyandsell.gc.ca/policy-and-guidelines/Standard-Acquisition-Clauses-and-Conditions-SACC-Manual/Standard-Procurement-Templates Manual based on the estimated dollar value and complexity of the requirement.

The bid solicitation will contain as a minimum the following:

  i.   security requirements (if applicable);
  ii. a complete description of the Work to be performed;
       2003, Standard Instructions - Goods or Services - Competitive Requirements; OR 2004, Standard Instructions - Goods or Services - Non-competitive Requirements;
  iii. bid preparation instructions;
  iv. instructions for the submission of bids (address for submission of bids, bid closing date and time);
  v.   evaluation procedures and basis of selection;
  vi. financial capability (if applicable);
  vii. Certifications;
  viii. conditions of the resulting contract.

2.   Bid Solicitation Process

Bids will be solicited for specific requirements within the scope of the Supply Arrangement (SA) from qualified active suppliers who have been issued a SA.

The bid solicitation will be posted on the Government Electronic Tendering Service (GETS) (or as applicable with a GoC web-based electronic procurement tool) or will be sent directly to supplier.

>   **Multiple Arrangements Exist:**
>
>   **Multiple Supply Arrangements have been issued for this requirement. Bids will be solicited in accordance with the processes described below within the specified monetary limitations. Each Contract issued as a result of a bid solicitation under the Supply Arrangement results in a separate contract between Canada and the Supplier.**

2.1   Generation of List of Eligible Suppliers

Identified Users will use the Government of Canada's search engine to produce a list of Eligible Suppliers (List) for their requirement using search criteria, such as: Regions, Metropolitan Areas, Security, Category of Personnel, and Level of Expertise. The List will include Suppliers meeting all the search criteria and possessing the necessary security clearance. The List will be available to the Identified User for Bid Solicitation issuance and may be revised over time to reflect changes in the status of any Supplier.

  (i) **Consolidation of Requirements:** Canada may consolidate requirements across Identified Users and issue Bid Solicitations and award Contracts on a periodic basis to receive best or better pricing.

  (ii) **Multiple Contracts**: Canada may issue bid solicitations where we will award more than one contract.

2.2   Overview of Bid Solicitation Process

Bid Solicitations: Bid solicitations will be issued using PWGSC Form 9400-3 or electronic document.

The Identified User may cancel the bid solicitation process at any time and reissue the same or a similar bid solicitation process thereafter.

Issuance of Contracts: Contracts will be issued using PWGSC Form 9400-4 or electronic document.

Identification of Contract Authorities: Provided an Identified User has the legal authority to contract, it may choose to permit a procurement representative to award contracts under this SA in accordance with the Contract Limitations described below. It is anticipated that the majority of Tier 1 contracts will be managed by the Identified Users. It is anticipated that the majority of Tier 2 contracts will be managed by PWGSC.

2.3   Tier 1 Task Based Contract Limitations: Canada may compete work and award contracts to Qualified Active Suppliers in accordance with the following:

      i.   **Requirement valued below $25,000 (GST/HST included)**: For requirements under $25,000 (GST/HST inc), in accordance with Government Contracting Regulations Identified Users may direct a contract to an eligible Supplier

        Requirement valued up to the NAFTA threshold: Identified Users will select in accordance with the Government Contracting Regulations the number of suppliers to be invited and the number of calendar days the invited suppliers will have to provide a proposal in response to the bid solicitation. Suppliers may be invited using either e-mail or GETS.

      ii.   **Requirement valued greater than the NAFTA threshold but less than or equal to $2M**: A minimum of fifteen (15) Qualified Active Suppliers must be invited (using e-mail or GETS) to submit a proposal in response to a bid solicitation. A Notice of Proposed Procurement (NPP) will be posted on GETS for all requirements.

        The minimum 15 suppliers are to include: five (5) randomly selected Suppliers selected by the Centralized Professional Services System (CPSS).

        As a minimum, invited suppliers will be given a minimum of fifteen (15) calendar days to submit a proposal in response to a bid solicitation. The time limit for bidding may be extended based upon the complexity of the requirement.

2.4   Tier 2 Task Based Contract Limitations: Canada may compete work and award contracts to Qualified Active Suppliers in accordance with the following:

      i.   **Requirement valued greater than $2M (Tier 2):** Canada will invite all Qualified Active Suppliers (using e-mail or GETS) to submit a proposal in response to a bid solicitation. A Notice of Proposed Procurement (NPP) will be posted on GETS for all requirements.

      ii.   **Minimum Bidding Period**: As a minimum, each Tier 2 SA Bid Solicitation issued under this SA framework will provide Qualified Active Suppliers with a minimum of 20 days to respond. The time limit for bidding may be extended based upon the complexity of the requirement.

6C.   RESULTING CONTRACT CLAUSES

1.   General

The conditions of any contract awarded under the Supply Arrangement will be in accordance with the resulting contract clauses of the template used for the bid solicitation.

Contracts will be awarded using the Standard Procurement Templates.

The templates are set out in buyandsell.gc.ca (http://buyandsell.gc.ca/policy-and guidelines/Standard-Acquisition-Clauses-and-Conditions-SACC-Manual/Standard-Procurement-Templates) Manual issued by Public Works and Government Services Canada.

ANNEX "A"
REQUIREMENTS

1.0   Scope

1.1 Background

1.1.1   The Professional Services requested are intended to secure access to suppliers who are experienced at providing Learning services. This will be the prime vehicle used for the acquisition of Traditional Classroom Learning, Blended Learning, and eLearning product development services. This includes the development of new Learning requirements and for the updating and converting existing learning & eLearning products.

1.1.2   Learning development services includes any or all of the following services:

a. Stream 1 – Strategic Learning Advisory Services

b. Stream 2 – Instructional Design and Development Services
c. Stream 3 – Custom eLearning Product Programming
d. Stream 4 – Rapid eLearning Product Programming
e. Stream 5 – Quality Assurance
f. Stream 6 – Multi-Media Design and Development;
g. Stream 7 – Project Management;
h. Stream 8 – Training Delivery

1.2 Language Requirement

1.2.1   The Supplier will be requested to provide services in either the English or French language, or both, in accordance with each individual requirement.

2.0   Applicable Documents

2.1   The following documents form part of requirements to the extent specified herein, and are supportive of the Requirements when referenced in section   3 – Requirements. All other document references are to be considered supplemental information only.

a. Appendix1 - Description of Blended Learning and eLearning;

b. Appendix2 - Acronyms;
c. Shareable Content Object Reference Model (SCORM) ;
d. Common Look and Feel Guidelines (http://www.cio-dpi.gc.ca/clf-upe/index_e.asp);
e. Web Content Accessibility Guidelines (WCAG) http://www.w3.org/WAI/intro/wcag20.php

2.2   In addition to the documents specified in 2.1   above, the following documents form part of the requirements for requirements from the Department of National Defence where referenced in section   3.

a. DLN Content Development Guide (Current version will be provided with the call-up / contract);

b. Canadian Forces Individual Training and Education System (CFITES) Manuals http://cda-acd.mil.ca/DTE/engraph/ITEpolicy/keydocs_e.asp.

* Note for Suppliers: web link is only accessible by DND personnel. It is the responsibility of the

supplier to request a copy of the applicable documents for each DND requirement from

ncr.learningservicessosa@tpsgc-pwgsc.gc.ca.

2.3   Additional applicable documents may be included with individual requirements.

3.0   REQUIREMENTS

3.1   Stream 1 – STRATEGIC LEARNING ADVISORY SERVICES

3.1.1   Strategic Learning Advisor

3.1.1.1   Tasks of the Strategic Learning Advisor include, but are not limited to:

a. Research Services:

i.   Monitoring the latest developments in technology and providing recommended directions to support the appropriate technical solutions for the learning products being developed;

ii.   Determining what technology and tools are available, ready and useful, and that meet the learners needs and performance objectives;

iii. Researching and advising on suitability of new learning technologies for adoption;

iv. Developing standards and processes for new learning technologies;

v.   Performing Vendor Analysis;

vi. Researching and recommending implementation and evaluation strategies for introduction of new learning technologies.

b. Strategic Advisory Services:

i.   Conducting strategic analysis in support of learning initiatives, including gathering and consolidating relevant data / information through needs assessments and environmental scans

ii.   Analyzing existing capabilities and requirements, developing redesigned frameworks and recommending areas for improved capability;

iii. Developing and documenting statement of requirements for learning technologies;

iv. Developing standards and processes for learning products;

v.   Developing service and administration management strategies for learning products; and

vi. Performing eLearning and/or blended learning readiness studies.

3.1.1.2 Deliverables may include but are not limited to:

a. Research Services

i.   Needs Assessment
ii.   Technology Assessment
iii.   Market Scans and Vendor Analysis
iv.   New Technology Business Cases
v.   Standards and Processes Documents
vi.   Implementations Plans
vii.   Briefings / Presentations

b. Strategic Advisory Services

     i. Strategic Plans
     ii. Business Plans
     iii. Business Cases
     iv. Capability Assessments
     v. Statement of Requirements;
     vi. Readiness Reports;
     vii. Learning Technology Strategy Reports

3.1.1.3 OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS

A. SENIOR STRATEGIC LEARNING ADVISOR

No.	Description of Criteria
M.1	Must have a graduate university degree with a Major in one of the following fields: Education, Adult Learning, Distance Learning, or eLearning.
M.2	Must have a minimum of five (5) years experience as a Strategic Learning Advisor.
M.3	If eLearning is expected to be a part of the requirement, must have a minimum of two (2) years experience as a Strategic Learning Advisor where eLearning was part of the requirement.

OR

No.	Description of Criteria
M.1	Must have an undergraduate university degree with a Major in one of the following fields: Education, Adult Learning, Distance Learning, or eLearning.
M.2	Must have a minimum of seven (7) years experience as a Strategic Learning Advisor.
M.3	If eLearning is expected to be a part of the requirement, must have a minimum of two (2) years experience as a Strategic Learning Advisor where eLearning was part of the requirement.

OR

No.	Description of Criteria
M.1	Must have a college diploma (in any field) or university degree (in any field).
M.2	Must have a minimum of nine (9) years experience in instructional design.
M.3	If eLearning is expected to be a part of the requirement, must have a minimum of two (2) years experience as a Strategic Learning Advisor where eLearning was part of the requirement.

B.   INTERMEDIATE STRATEGIC LEARNING ADVISOR

No.	Description of Criteria
M.1	Must have a graduate university degree with a Major in one of the following fields: Education, Adult Learning, Distance Learning, or eLearning.
M.2	Must have a minimum of one (1) year experience as a Strategic Learning Advisor.
M.3	If eLearning is expected to be a part of the requirement, must have a minimum of one (1) year experience as a Strategic Learning Advisor where eLearning was part of the requirement.

OR

No.	Description of Criteria
M.1	Must have an undergraduate university degree with a Major in one of the following fields: Education, Adult Learning, Distance Learning, or eLearning.
M.2	Must have a minimum of three (3) years experience as a Strategic Learning Advisor.
M.3	If eLearning is expected to be a part of the requirement, must have a minimum of one (1) year experience as a Strategic Learning Advisor where eLearning was part of the requirement.

OR

No.	Description of Criteria
M.1	Must have a college diploma (in any field) or university degree (in any field).
M.2	Must have a minimum of five (5) years experience as a Strategic Learning Advisor.
M.3	If eLearning is expected to be a part of the requirement, must have a minimum of one (1) year experience as a Strategic Learning Advisor where eLearning was part of the requirement.

C.   JUNIOR STRATEGIC LEARNING ADVISOR

No.	Description of Criteria
M.1	Must have an undergraduate university degree (in any field).
M.2	Must have a minimum of one (1) year experience as a Strategic Learning Advisor.
M.3	If eLearning is expected to be a part of the requirement, must have a minimum of six (6) months experience as a Strategic Learning Advisor where eLearning was part of the requirement.

OR

No.	Description of Criteria
M.1	Must have a college degree (in any field).
M.2	Must have a minimum of three (3) years experience as a Strategic Learning Advisor.
M.3	If eLearning is expected to be a part of the requirement, must have a minimum of six (6) months experience as a Strategic Learning Advisor where eLearning was part of the requirement.

3.2.0   Stream 2 - Instructional Design & Development Services

3.2.1   Instructional Designer

3.2.1.1   Tasks of an Instructional Designer include, but are not limited to:

a. Conducting needs assessments in order to examine human performance issues IAW CFITES volume 2, or equivalent, including:

   i. Conducting performance analyses;

   ii. Conducting cause analyses; and

   iii. Identifying solutions and making recommendations.

b. Assisting in specifying the required training and education outcomes in terms of essential on-job performance IAW CFITES volume 3, or equivalent, including:

   i. Performing job task analysis;

   ii. Specifying performance/education/learning objectives (POs/EdOs/LOs); and

   iii. Producing Qualification Standards (QSs)/ Knowledge standards (KS).

c. Describing and/or selecting an instructional program IAW CFITES volume 4 and 7, and Defence Learning Network Courseware Development Guidelines, or equivalent including:

   i. Defining learner characteristics;

   ii. Performing instructional and learning paths analysis;

   iii. Preparing learning assessment plans;

   iv. Designing learning assessment instruments;

   v. Identifying and costing instructional/blended learning strategies;

   vi. Specifying instructional strategies;

   vii. Specifying learning content and lesson guidance; and

   viii. Producing lesson guidance documentation (design guidance documents and scripted storyboards).

d. Producing effective Learning instructional materials IAW CFITES volume 5, and Defence Learning Network Courseware Development Guidelines, or equivalent including:

   i. Identifying training/performance requirements and determining sources of Learning materials;

   ii. Making recommendations on the procurement of instructional materials;

   iii. Developing style guides;

   iv. Producing instructional Learning materials;

   v. Conducting beta testing and formative evaluations of Learning instructional material to ensure compliance with specified standards and client requirements, and revising as required;

   vi. Design of student evaluation must ensure correct level. Evaluation should consider level at which students will be required to perform and include level at appropriate level of Bloom's taxonomy;

   vii. Preparing Instructors for the use / implementation of Learning instructional materials into training programs; and

   viii. Recording development costs of Learning instructional materials.

e. Evaluating instructional materials for possibility of conversion to eLearning in whole or in part IAW Defence Learning Network Courseware Development Guidelines, or equivalent and provide cost estimates of level of effort to convert legacy courseware to eLearning.

3.2.1.2 Deliverables may include but are not limited to:

    i.   Needs Assessment Report;

    ii.   Qualification Standard (QS);
    iii.   Training Plan (TP) or curriculum;
    iv.   Design Guidance Document;
    v.   Final Scripted Storyboards;
    vi.   Style guides;
    vii.   Learning instructional materials; and
    viii. Evaluation Report.

3.2.1.3 <u>OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS</u>

    A.   **SENIOR INSTRUCTIONAL DESIGNER**

No.	Description of Criteria
M.1	Must have a graduate university degree with a Major in one of the following fields: Education, Adult Learning, Distance Learning, or eLearning.
M.2	Must have a minimum of five (5) years experience in instructional design.
M.3	If eLearning is part of the requirement, must have a minimum of two (2) years experience in the instructional design of eLearning product(s).

OR

No.	Description of Criteria
M.1	Must have an undergraduate university degree with a Major in one of the following fields: Education, Adult Learning, Distance Learning, or eLearning.
M.2	Must have a minimum of seven (7) years experience in instructional design.
M.3	If eLearning is part of the requirement, must have a minimum of two (2) years experience in the instructional design of eLearning product(s).

OR

No.	Description of Criteria
M.1	Must have a college diploma (in any field) or university degree (in any field).
M.2	Must have a minimum of nine (9) years experience in instructional design.

No.	Description of Criteria
M.3	If eLearning is part of the requirement, must have a minimum two (2) years experience in the instructional design of eLearning product(s).

B.   INTERMEDIATE INSTRUCTIONAL DESIGNER

No.	Description of Criteria
M.1	Must have a graduate university degree with a Major in one of the following fields: Education, Adult Learning, Distance Learning, or eLearning.
M.2	Must have a minimum of one (1) year experience in instructional design.
M.3	If eLearning is part of the requirement, must have a minimum of one (1) years experience in the instructional design of eLearning product(s).

OR

No.	Description of Criteria
M.1	Must have an undergraduate university degree with a Major in one of the following fields: Education, Adult Learning, Distance Learning, or eLearning.
M.2	Must have a minimum of three (3) years experience in instructional design.
M.3	If eLearning is part of the requirement, must have a minimum of one (1) years experience in the instructional design of eLearning product(s).

OR

No.	Description of Criteria
M.1	Must have a college diploma (in any field) or university degree (in any field).
M.2	Must have a minimum of five (5) years experience in instructional design.
M.3	If eLearning is part of the requirement, must have a minimum of one (1) years experience in the instructional design of eLearning product(s).

C.   JUNIOR INSTRUCTIONAL DESIGNER

No.	Description of Criteria

M.1	Must have an undergraduate university degree (in any field).
M.2	Must have a minimum of one (1) year experience in instructional design.
M.3	If eLearning is part of the requirement, must have a minimum of six (6) months experience in the instructional design of eLearning product(s).

<div align="center">OR</div>

No.	Description of Criteria
M.1	Must have a college degree (in any field).
M.2	Must have a minimum of three (3) years experience in instructional design.
M.3	If eLearning is part of the requirement, must have a minimum of six (6) months experience in the instructional design of eLearning product(s).

3.2.2 Content Subject Matter Expert (SME)

3.2.2.1 Tasks of the Content Subject Matter Expert include, but are not limited to:

a. Verifying the scope of the content requirements;

b. Identifying the content, including identifying source material and reference items, such as books, articles, videotapes, and static media;

c. Editing and proofreading the content before and after implementation;

d. Reviewing the design documents, scripts, and the final deliverable to verify content accuracy.

3.2.2.2 Deliverables may include but are not limited to:
a. Subject Matter Content.

3.2.2.3 <u>OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS</u>

A. SENIOR CONTENT SUBJECT MATTER EXPERT

No.	Description of Criteria
M.1	Must have a minimum of ten (10) years experience in the content area related to the requirement.

B. INTERMEDIATE CONTENT SUBJECT MATTER EXPERT

No.	Description of Criteria
M.1	Must have a minimum of seven (7) years experience in the content area related to the requirement.

C. JUNIOR CONTNET SUBJECT MATTER EXPERT

No.	Description of Criteria
M.1	Must have a minimum of five (5) years experience in the content area related to the requirement.

3.2.3 Technical Writing

3.2.3.1 Tasks of the Technical Writer include, but are not limited to:

a. Verifying scope of the content;
b. Performing and end user analysis;
c. Conducting research and analysis of the information provided;
d. Writing theoretical and procedural content based;
e. Editing copy
f. Creating manuals;
g. Reviewing, editing and proofreading material;
h. Reviewing accuracy and usability of written material

3.2.3.2 Deliverables may include but are not limited to:

a. Student Manuals
b. User Manuals
c. Guidebooks

3.2.3.3 OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS

A.   SENIOR TECHNICAL WRITER

No.	Description of Criteria
M.1	Must have a college diploma (in any field) or university degree (in any field).
M.2	Must have a minimum of **nine (9)** years experience as a Technical Writer.

B.   INTERMEDIATE TECHNICAL WRITER

No.	Description of Criteria
M.1	Must have a college diploma (in any field) or university degree (in any field).
M.2	Must have a minimum of **five (5)** years experience as a Technical Writer.

C.   JUNIOR TECHNICAL WRITER

No.	Description of Criteria
M.1	Must have a college diploma (in any field) or university degree (in any field).
M.2	Must have a minimum of **three (3)** years experience as a Technical Writer.

3.3.0   Stream 3 – Custom eLearning Product Programming

3.3.1   Tasks of a Custom eLearning Product Programmer include, but are not limited to:

a. Reviewing, analyzing and making recommendations with respect to programming issues on project documentation including:

    i. Coding standard(s) chosen;

    ii. Client Needs Assessment; and

    iii. Infrastructure topology.

b. Developing advanced project components, including:

    i. A User Interface in accordance with the Style Guide;

    ii. Pseudo-code and metadata templates;

    iii. Advanced JavaScript course elements;

    iv. All course elements and related assets;

    v. SCO and Asset Metadata documents;

    vi. SCORM® conformance and usability testing;

    vii. Quality assurance testing; and

    viii. A Maintenance Guide that provides information relevant to modifying and maintaining the end products.

c. Coding / programming eLearning product elements in accordance with the Instructional Design Document(s), including:

    i. Multi-Media elements;

    ii. Interactive elements;

    iii. Instruction content elements;

    iv. Shareable Content Objects (SCOs);

    v. Assessment instruments; and

    vi. Evaluation instruments.

d. Designing and Developing data structure, including:

    i. Designing database structures and relationships; and

    ii. Documenting database implementation including connection details.

e. Implementing quality assurance and test plans;

f. Providing technical guidance including:

    i. Recommending best practices;

    ii. Making recommendations regarding eLearning product development;

    iii. Identifying and recommending solutions to identified coding issues;

    iv. Reviewing test documentation; and

    v. Documenting solutions or work-arounds to identified issues.

3.3.2   **Deliverables may include but are not limited to:**

a. User Interface;

b. Prototype SCO for testing with SCORM Test Logs;

c. XML, XSLT, and XHTML based templates;

d. Alpha, Beta, and Final versions of eLearning Products

e. SCORM conformant course w/SCORM Test Logs

f. Maintenance Guide that provides detailed instructions on maintenance and modification of eLearning products; and

g. Interactive Multimedia Objects.

3.3.3   <u>OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS</u>

A.   SENIOR CUSTOM ELEARNING PRODUCT PROGRAMMER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of seven (7) years experience in programming web-based applications using Java, C-based language, or a scripting language, as well as, database and/or file structured back-ends.
M.3	Must have developed and packaged a minimum of four (4) CBT and/or WBT courses within the last four (4) years.
M.4	Must have optimized for performance including Multi-Media assets audio, video, or still images for a minimum of four (4) eLearning products.
M.5	If SCORM is required as part of the requirement, then must have developed SCORM Conformant content (any version, including content packages and metadata) for a minimum of nine (9) SCORM courses within the last three (3) years.

B.   INTERMEDIATE CUSTOM ELEARNING PRODUCT PROGRAMMER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of three (3) years experience in programming web-based applications using Java, C-based language, or a scripting language, as well as, database and/or file structured back-ends.
M.3	Must have developed and packaged a minimum of two (2) CBT and/or WBT courses within the last three (3) years.
M.4	Must have optimized for performance including Multi-Media assets audio, video, or still images for a minimum of (2) eLearning products; and
M.5	If SCORM is required as part of the requirement, then must have developed SCORM Conformant content (any version as specified by the client, including content packages and metadata files) for a minimum of two (2) SCORM courses within the last three (3).

C.   JUNIOR CUSTOM ELEARNING PRODUCT PROGRAMMER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of one (1) year experience in programming web-based applications using Java, C-based language, or a scripting language, as well as, database and/or file structured back-ends.

No.	Description of Criteria
M.3	Must have developed and packaged a minimum of one (1) CBT or WBT course within the last three (3) years.
M.4	Must have optimized for performance including Multi-Media assets audio, video, or still images for a minimum of one (1) eLearning products.
M.5	If SCORM is required as part of the requirement, then must have developed SCORM Conformant content (any version as specified by the client, including content packages and metadata files) for a minimum of one (1) SCORM courses within the last three (3) years.

OR

No.	Description of Criteria
M.1	Must have a Secondary School diploma.
M.2	Must have a minimum of three (3) years experience in programming web-based applications using Java, C-based language, or a scripting language, as well as, database and/or file structured back-ends.
M.3	Must have developed and packaged a minimum of one (1) CBT or WBT course within the last three (3) years.
M.4	Must have optimized for performance including Multi-Media assets audio, video, or still images for a minimum of one (1) eLearning products.
M.5	If SCORM is required as part of the requirement, then must have developed SCORM Conformant content (any version as specified by the client, including content packages and metadata files) for a minimum of one (1) SCORM courses within the last three (3) years.

3.4 Stream 4 – Rapid eLearning Product Programming

3.4.1 Rapid eLearning Product Programmer

3.4.1.1 Tasks of a Rapid eLearning Product Programmer resource include, but are not limited to:

a. Creating multimedia animation using images, sound, and video;

b. Using authoring software to assemble eLearning content and publish the course in accordance with the Instructional Design Document(s);

c. Designing and creating interactions that are packaged in a rapid eLearning software;

d. Troubleshooting and resolving online course interactions that are not publishing correctly or reporting correctly to a Learning Management system;

e. Working with instructional designers to develop the content based on storyboards;

f. Providing advice on the suitable interaction and also on the limits of certain applications;

g. Creating reusable online content;

3.4.1.2 Deliverables may include but are not limited to:

a. Alpha, Beta, and Final versions of eLearning Products;
b. SCORM conformant course; and
c. Maintenance Guide that provides detailed instructions on maintenance and modification of eLearning products.

3.4.1.3 <u>OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS</u>

A.   SENIOR RAPID ELEARNING PRODUCT PROGRAMMER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have developed a minimum of five (5) eLearning courses in the last two (2) years using rapid eLearning tools (as specified by the client, such as Adobe Illustrator, Adobe Photoshop, Adobe Captivate, Adobe Dreamweaver, Adobe Contribute, HTML, CSS, Adobe Flash and/or Articulate by Techsmith)
M.3	If SCORM is required as part of the requirement, then must have developed SCORM Conformant content (any version as specified by the client, including content packages and metadata files) for a minimum of three (3) SCORM courses within the last two (2) years.

B.   INTERMEDIATE RAPID ELEARNING PRODUCT PROGRAMMER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have developed a minimum of four (4) eLearning courses in the last two (2) years using rapid eLearning tools (as specified by the client, such as Adobe Illustrator, Adobe Photoshop, Adobe Captivate, Adobe Dreamweaver, Adobe Contribute, HTML, CSS, Adobe Flash and/or Articulate by Techsmith)
M.3	If SCORM is required as part of the requirement, then must have developed SCORM Conformant content (any version as specified by the client, including content packages and metadata files) for a minimum of two (2) SCORM courses within the last two (2) years.

C.   JUNIOR RAPID ELEARNING PRODUCT PROGRAMMER

No.	Description of Criteria
M.1	Must have a minimum of Secondary School Diploma.
M.2	Must have developed a minimum of three (3) eLearning courses in the last two (2) years using rapid eLearning tools (as specified by the client, such as Adobe Illustrator, Adobe Photoshop, Adobe Captivate, Adobe Dreamweaver, Adobe Contribute, HTML, CSS, Adobe Flash and/or Articulate by Techsmith)
M.3	If SCORM is required as part of the requirement, then must have developed SCORM Conformant content (any version as specified by the client, including content packages and metadata files) for a minimum of one (1) SCORM course within the last two (2) years.

3.5.0   Stream 5 - Quality Assurance

3.5.1 **Tasks of a Quality Assurance resource include, but are not limited to:**

a. Developing a Quality Assurance (QA) plan, including:

    i. Quality standards, methodologies, procedures and tools for performing the quality assurance activities

    ii. Resources, schedule and responsibilities for conducting the QA activities; and

    iii. Selected activities and tasks for supporting processes, such as verification, validation, joint review, audit and problem resolution

b. Developing quality assurance test plan(s), including alpha, beta and pilot testing;

c. Implementing Quality Assurance test plan(s), including:

    i. Testing eLearning programs for conformity to client approved design documents, instructional standards, guidance and specifications, scripts and storyboards;

    ii. Testing the eLearning program for interactivity, functionality and programming bugs;

    iii. Assuring grammatical and spelling accuracy in English, French, or both languages in accordance with the requirement;

    iv. Ensuring consistency throughout the Learning product in presentation and style including use of colors, fonts, formats, navigation architecture & strategy, modularization, consistency between English and French versions;

    v. Ensuring consistency with guidelines, conventions, taxonomies and / or best practice in the use of metadata; and

    vi. Testing for SCORM conformance in an approved LMS/LCMS testing environment;

    vii. Performing testing of eLearning programs to ensure they function as planned in the client LMS/LCMS environment; and

    viii. Recording the results of all QA interventions and making them available to the Technical Authority.

d. Writing reports based upon the results of the QA Test Plan.

3.5.2 **Deliverables may include but are not limited to:**

a. QA Plan

b. Product QA tests and test plans

c. Product QA test reports

3.5.3 <u>OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS</u>

A. **QUALITY ASSURANCE SPECIALIST**

No.	Description of Criteria
M.1	Must have a minimum of three (3) years of experience in developing QA policies, plans, procedures and metrics.
M.2	Must have a minimum of three (3) years of experience in developing software development standards.
M.3	Must have a minimum of three (3) years of experience in managing the QA process.

B. **SENIOR TESTER**

No.	Description of Criteria
M.1	Must have a minimum of four (4) years of experience with eLearning products in conducting testing in accordance with Test Plans.

No.	Description of Criteria
M.2	Must have a minimum of four (4) years of experience with eLearning products in supervision of testing.
M.3	Must have a minimum of four (4) years of experience with eLearning products in management of test plans derived by the QA process.
M.4	Must have a minimum of four (4) years of experience with eLearning products in establishing testing procedures.
M.5	Must have a minimum of four (4) years of experience with eLearning products in development of test scenarios and test scripts.
M.6	Must have a minimum of four (4) years of experience with eLearning products in establishing a validation and verification capability.
M.7	If SCORM is required as part of the requirement, then must have tested SCORM Conformant content (any version, including content packages and metadata files) for a minimum of six (6) SCORM courses within the last three (3) years.

C.   JUNIOR TESTER

No.	Description of Criteria
M.1	Must have a minimum of two (2) years of experience with eLearning products in conducting testing in accordance with Test Plans.
M.2	Must have a minimum of two (2) years of experience with eLearning products in supervision of testing.
M.3	Must have a minimum of two (2) years of experience with eLearning products in developing test plans.
M.4	Must have a minimum of two (2) years of experience with eLearning products in development of test scenarios and test scripts.
M.5	Must have a minimum of two (2) years of experience with eLearning products in establishing a validation and verification capability.
M.6	If SCORM is required as part of the requirement, then must have tested SCORM Conformant content (any version, including content packages and metadata files) for a minimum of three (3) SCORM courses within the last three (3) years.

3.6.0   Stream 6 - Multi-Media Design & Development

3.6.1   Graphic Design

3.6.1.1   Tasks of a Graphic Designer include, but are not limited to:

a. Determine the best way to achieve the desired graphics either through the use of existing stock, development of new material, or combination of both;

b. Consulting with clients to establish the overall look and graphical elements;

c. Reviewing the Presentation Design Document and/or the Scripted Storyboards and making recommendations to the Instructional Designer(s) and/or client; including:

   i.   Consulting the clients regarding associated costs;

   ii.   Validating that the design is engaging and meets the client requirements.

d. Create designs, concepts, and sample layouts of graphical elements in accordance with the Presentation Design Documents and the Scripted Storyboards.

e. Determine size and arrangement of illustrative material and copy, and select style and size of type;

f. Create new images using computer software;

g. Mark up, paste, and assemble final layouts

h. Digitizing images

3.6.1.2 Deliverables may include but are not limited to:

a. Graphic Concepts

b. Graphics

c. Sample Layouts

d. Final Layouts

e. Multimedia Graphic Objects

3.6.1.3 <u>OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS</u>

A.   SENIOR GRAPHICS DESIGNER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of three (3) years of experience within the last five (5) years as a Graphic Designer.

B.   INTERMEDIATE GRAPHICS DESIGNER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of three (3) years of experience within the last five (5) years as a Graphic Designer.

C.   Junior Graphics Designer

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of one (1) year of experience within the last five (5) years as a Graphic Designer.

OR

No.	Description of Criteria
M.1	Must have a Secondary School diploma.
M.2	Must have a minimum of three (3) years of experience within the last five (5) years as a Graphic Designer.

3.6.2   Photography

3.6.2.1 Tasks of a Photographer include, but are not limited to:

a. Determine the best way to achieve the desired Photographs either through the use of existing stock, development of new material, or combination of both;

b. Use traditional or digital cameras to take pictures either in a studio or on location;

c. Adjust apertures, shutter speeds, and camera focus based on a combination of factors such as lighting, field depth, subject motion, film type, and film speed;

d. Determine desired images and picture composition; and select and adjust subjects, equipment and/or lighting to achieve desired result;

e. Scan photographs into computers for editing, storage, and/or electronic transmission;

f. Measure light levels, distances, and numbers of exposures needed;

g. Manipulate and enhance scanned and/or digital images to create desired effects, using computers and specialized software.

h. Reviewing the Presentation Design Document and/or the Scripted Storyboards and making recommendations to the Instructional Designer(s) and/or client; including:

    i. Consulting the clients regarding associated costs;

    ii. Validating that the design is engaging and meets the client requirements.

3.6.2.2 Deliverables may include but are not limited to:

a. High quality photos;

b. Web-ready photos and thumbnails;
c. Panoramic photos;
d. Virtual spaces;

3.6.2.3 <u>OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS</u>

A. PHOTOGRAPHER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of three (3) years of experience within the last six (6) years as a Photographer.

OR

No.	Description of Criteria
M.1	Must have a Secondary School diploma.
M.2	Must have a minimum of five (5) years of experience within the last eight (8) years as a Photographer.

3.6.3 Animator

3.6.3.1 Tasks of an Animator include, but are not limited to:

a. Determine the best way to achieve the desired animation either through the use of existing stock, development of new material, or combination of both;

b. Design and create two-dimensional and three-dimensional images depicting objects in motion and/or illustrating a process, using computer animation or modelling programs;

c. Make objects or characters appear lifelike by manipulating light, colour, texture, shadow, and transparency to give the illusion of motion;

d. Create Storyboards that show the flow of the animation and map out key scenes and/or characters;

e. Reviewing the Presentation Design Document and/or the Scripted Storyboards and making recommendations to the Instructional Designer(s) and/or client; including: Create Storyboards that show the flow of the animation and map out key scenes and/or characters;

    i. Consulting the clients regarding associated costs;

    ii. Validating that the design is engaging and meets the client requirements.

3.6.3.2 Deliverables may include but are not limited to:

a. 2D and 3D animations;

b. Serious gaming objects, such as avatars, systems, and landscapes;

3.6.3.3 <u>OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS</u>

A. SENIOR ANIMATOR

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of five (5) years of experience within the last eight (8) years as an Animator.

B. INTERMEDIATE ANIMATOR

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College Diploma (in any field).
M.2	Must have a minimum of three (3) years of experience within the last six (6) years as an Animator.

C. JUNIOR ANIMATOR

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of one (1) year of experience within the last six (6) years as an Animator.

OR

No.	Description of Criteria
M.1	Must have a Secondary School diploma.
M.2	Must have a minimum of three (3) years of experience within the last six (6) years as an Animator.

3.6.4 Video Production

3.6.4.1 Tasks of a Video Producer include, but are not limited to:

a. Determine the best way to achieve the desired video either through the use of existing stock, development of new material, or combination of both;

b. Cut shot sequences to different angles at specific points in scenes in order to make individual cuts fluid and seamless;
c. Edit video to insert music, dialogue, and/or sound effects;
d. Select and combine scenes to form a logical and smoothly running story;
e. Determine the specific audio and visual effects, and/or music necessary to complete the video;
f. Reviewing the Presentation Design Document and/or the Scripted Storyboards and making recommendations to the Instructional Designer(s) and/or client; including:

    i.   Consulting the clients regarding associated costs;

    ii.   Validating that the design is engaging and meets the client requirements.

3.6.4.2   Deliverables may include but are not limited to:

a. High quality video;

b. Web-ready video;

3.6.4.3.   <u>OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS</u>

A.   **VIDEO PRODUCER**

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of three (3) years of experience within the last six (6) years as a Video Producer.

OR

No.	Description of Criteria
M.1	Must have a Secondary School diploma.
M.2	Must have a minimum of five (5) years of experience within the last eight (8) years as a Video Producer.

3.6.5   **Audio Production**

3.6.5.1   Tasks of an Audio Producer include, but are not limited to:

a. Determine the best way to achieve the desired audio, sound bite, music, sound effects, and/or audio clip either through the use of existing stock, development of new material, or combination of both;

b. Record speech, music, and other sounds

c. Regulate volume level and sound quality during recording sessions;

d. Mix and edit voices, music, sound effects;

e. Separate instruments, vocals, and other sounds, then combine later during the mixing or post production stage;

f. Synchronize and equalize pre-recorded dialogue, music, and sound effects with animation, video, and/or into the learning product;

g. Reviewing the Presentation Design Document and/or the Scripted Storyboards and making recommendations to the Instructional Designer(s) and/or client; including:

    i.   Consulting the clients regarding associated costs;

    ii.   Validating that the design is engaging and meets the client requirements.

3.6.5.2 Deliverables may include but are not limited to:

    a. High quality audio;

    b. Web-ready audio;

3.3.5.3 <u>OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS</u>

    A.   **AUDIO PRODUCER**

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of three (3) years of experience within the last six (6) years as an Audio Producer.

<div align="center">OR</div>

No.	Description of Criteria
M.1	Must have a Secondary School diploma.
M.2	Must have a minimum of five (5) years of experience within the last eight (8) years as an Audio Producer.

3.6.6   **Multimedia Director**

3.6.6.1 Tasks of a Multimedia Director include, but are not limited to:

    a. Determine the best way to achieve the desired audio, sound bite, music, sound effects, and/or audio clip either through the use of existing stock, development of new material, or combination of both;

    b. Coordinate the work of camera and/or audio resource(s);

    c. Coordinate with Video and/or Audio Producers during the post-production process;

    d. Plan details such as framing, composition, camera movement, sound, and actor movement for each shot or scene;

    e. Establish pace of programs and sequences of scenes according to time requirements and cast and set accessibility;

    f. Select settings and locations for Video and determine how scenes will be shot in those settings;

    g. Coordinate rehearsals and communicate the "approach, characterization, and movement" needed for each scene

    h. Reviewing the Presentation Design Document and/or the Scripted Storyboards and making recommendations to the Instructional Designer(s) and/or client; including:

        i.   Consulting the clients regarding associated costs;

        ii.   Validating that the design is engaging and meets the client requirements.

3.6.6.2 Deliverables may include but are not limited to:

    a. Production ready storyboards;

    b. A finished multimedia eLearning product.

3.6.6.3 <u>OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS</u>

    A.   **MULTIMEDIA DIRECTOR**

No.	Description of Criteria
M.1	Must have a University degree (in any field) or College diploma (in any field).
M.2	Must have a minimum of one (1) year of experience within the last six (6) years as a Multimedia Director.

OR

No.	Description of Criteria
M.1	Must have a Secondary School diploma.
M.2	Must have a minimum of three (3) years of experience within the last six (6) years as Multimedia Director.

3.6.7   Narration

3.6.7.1   Tasks of a Narrator include, but are not limited to:

a. Performing the voice dialogue of scripted storyboards whereby the narrator communicates directly to the reader.
b. Performing the voice-over presentation to the audience (also known as off-camera or off-stage commentary).
c. Performing voice-acting activities, not limited to, animated characters for short films, video games, instructional videos, singing, etc.

3.6.7.2 Deliverables may include but are not limited to:

a. Sample audio recordings;
b. Final audio recordings;
c. Sample voice dialogue recordings;
d. Final voice dialogue recordings;

3.6.7.3 OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS

A.   NARRATOR

No.	Description of Criteria
M.1	Must have a minimum of a Secondary School diploma, College diploma (in any field) or a University Degree (in any field).
M.2	Must have a minimum of one (1) year of experience within the last three (3) years as a Narrator.

3.7.0   Stream 7 - Project Management

3.7.1   Tasks of a Project Manager include, but are not limited to:

a. Managing the scope of the projects and products, budget and schedule;

b. Developing and updating the work breakdown structure and detailed project plans;
c. Tracking project plans and managing resources;
d. Managing the change control process;
e. Maintaining communication with government stakeholders and other project managers and reports progress of the project on an ongoing basis and at scheduled points in the life cycle;
f. Managing risks and implementing problem resolutions;
g. Planning, organizing, directing and controlling quality assurance throughout the project; and
h. Supporting the release, implementation and delivery of products.

3.7.2   Deliverables may include but are not limited to:

a. Work Breakdown Structure;

b. Project Plan; and
c. Project Status Reports.

3.7.3   OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS

A.   SENIOR PROJECT MANAGER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or a College Diploma (in any field) or a Project Management Professional (PMP) certification from the Project Management Institute. www.pmi.org
M.2	Must have a minimum of six (6) years experience as a Project Manager, including three (3) years experience in managing training projects.
M.3	If eLearning is part of the requirement, then the Project Manager must have a minimum of three (3) years experience in managing eLearning and/or software projects, including a minimum of one (1) year of experience in managing eLearning projects.

B.   INTERMEDIATE PROJECT MANAGER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or a College Diploma (in any field) or a Project Management Professional (PMP) certification from the Project Management Institute. www.pmi.org
M.2	Must have a minimum of four (4) years experience as a Project Manager, including two (2) years experience in managing training projects.
M.3	If eLearning is part of the requirement, then the Project Manager must have a minimum of two (2) years experience in managing eLearning and/or software projects, including a minimum of one (1) year of experience in managing eLearning projects.

C.   JUNIOR PROJECT MANAGER

No.	Description of Criteria
M.1	Must have a University degree (in any field) or a College Diploma (in any field) or a Project Management Professional (PMP) certification from the Project Management Institute. www.pmi.org
M.2	Must have a minimum of two (2) years experience as a Project Manager, including a minimum of one (1) year experience in managing training projects.
M.3	If eLearning is part of the requirement, then the Project Manager must have a minimum of two (2) years experience in managing eLearning and/or software projects, including a minimum of one (1) year of experience in managing eLearning projects.

3.8.0   Stream 8 – Training Delivery

3.8.1 Instructor

3.8.1.1 Instructors may be used to teach government owned training in any of the subject areas identified below. Subject areas are based upon the content and not the target population.

a. Human Resources;
b. Finance;
c. Management Skills;
d. Leadership Development;
e. Change Management;
f. Project Management;
g. Career Counselling;
h. Environment;
i. Energy Management;
j. Military Occupation Training;
k. Public Safety;
l. Health & Safety;
m. Information Technology;
n. Health Services
o. General (subject area to be identified in the resulting call-up or bid solicitation).

3.8.1.2 Tasks of the Instructors include, but are not limited to:

a. Deliver the training in accordance with the course Lesson Plan, using appropriate Adult Education techniques
b. Setting up the classroom prior to the start of the scheduled start time;
c. Provide administrative briefing to participants at the beginning of the course outlining location of fire exits, washrooms, restaurant facilities, lunchroom area, and course outline.
d. Distribute attendance list to participants for their signature;
e. Evaluate tests and/or assignments;
f. Distribute course certificates to participants;
g. Distribute course evaluations to participants.
h. Provide any feedback and recommendations to the Project Authority regarding the course;
i. Set-up the online environment in accordance with the training plan.

3.8.1.3 Deliverables may include but are not limited to:

a. Course Feedback Report

3.8.1.4 <u>OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS</u>

A.   SENIOR INSTRUCTOR

No.	Description of Criteria
M.1	Must have a minimum of one hundred and twenty (120) training days within the last three (3) years in Instructing in the identified subject area.
M.2	Must have a minimum of one (1) year experience (not as an Instructor) in the identified subject area.

B.   INTERMEDIATE INSTRUCTOR

No.	Description of Criteria

M.1	Must have a minimum of sixty (60) training days within the last three (3) years in Instructing in the identified subject area.
M.2	Must have a minimum of one (1) year experience (not as an Instructor) in the identified subject area.

C.   JUNIOR INSTRUCTOR

No.	Description of Criteria
M.1	Must have a minimum of thirty (30) training days within the last three (3) years in Instructing in the identified subject area.

3.8.2   **Training Facilitator**

a.   Training Facilitators may be used to facilitate any government owned training that is delivered as in-person training facilitation (e.g. classroom), online facilitation, and for blended training facilitation (e.g. classroom and online).

3.8.2.1 **Definition of Online Facilitation**

a.   Online Facilitation involves managing learners and learning through an online medium such as virtual classroom applications. It also refers to the management of online communication between learners by a facilitator. In this regard, online facilitation is moving from an emphasis on web content to a more interactive structure that recognizes the social and interactive elements of knowledge construction, and to pedagogical approaches that enable learner centred, rather than facilitator driven learning.

b.   There are two main types of online facilitation:

   i.   **Asynchronous** – communications such as discussion forums, electronic bulletin boards and e-groups in which the facilitator acts as a moderator reviewing contributors message offline and posting administrative messages; and

   ii. **Synchronous** – events in which the facilitator works in real time, leading or assisting in the delivery of instruction to learners within a virtual classroom application though lecture, discussion, interactive exercises, use of slides, whiteboard, application sharing and document review, and other tools and techniques commonly associated with virtual classroom applications.'

c.   Means of online facilitation include, but are not limited to the following:

   i.   Virtual Classroom application software;
   ii.   Static Text;
   iii. Threaded or unthreaded discussion boards;
   iv.   Instant Messaging (IM) or Chat;
   v.   Live voice or video;
   vi.   Provision of links to other materials or lists of materials;
   vii. E-mail; and
   viii. Non-virtual means, such as phone support.

3.8.2.2 Tasks of a Training Facilitator include, but are not limited to:

   a. Becoming familiar with the course content prior to course delivery;
   b. Attending train-the-training sessions, dry run and pilot tests;
   c. Contribute suggestions towards course improvements or revisions;

d. Deliver training by:

i. Guiding learners through course materials and specific activities (e.g. problem solving, information sharing), and focusing on critical points;
ii. Critiquing work / thinking in a supportive fashion;
iii. Promoting interactivity and discussions;
iv. Maintaining a pace suitable to the course schedule;
v. Creating and fostering a collaborative and safe environment for participants;
vi. Motivating learners to take responsibility for their own learning;
vii. Catering to different learning preferences and learner needs, finding the optimal balance between private e-mail and public discussions, and encouraging collaborative work and learner-learner or group discussions;
viii. Moderating and/or managing discussions, encouraging and gently guiding the discussion, planting ideas or starting new topics, and managing differences of opinion or perspectives effectively
ix. Sharing information and resources with the group;
x. Answering participants' questions and provide help when required.

e. Helping learners make the transition from private one-on-one e-mail to group participation;
f. Assisting learners to become comfortable with systems and software;
g. Scanning for copyrighted material that shouldn't be posted without permission of the author.

3.8.2.3 Deliverables may include but are not limited to:

a. Course Feedback Reports

3.8.2.4 <u>OCCUPATIONAL MINIMUM MANDATORY QUALIFICATIONS</u>

A.   SENIOR TRAINING FACILITATOR

No.	Description of Criteria
M.1	Must have delivered a minimum of one hundred and twenty (120) training days within the last three (3) years as a Training Facilitator
M.2	If online training facilitation is part of the requirement, then must have delivered a minimum of ninety (90) training hours within the last three (3) years as an Online Training Facilitator.

B.   INTERMEDIATE TRAINING FACILITATOR

No.	Description of Criteria
M.1	Must have delivered a minimum of sixty (60) training days within the last three (3) years as a Training Facilitator
M.2	If online training facilitation is part of the requirement, then must have delivered a minimum of sixty (60) training hours within the last three (3) years as an Online Training Facilitator.

C.   JUNIOR TRAINING FACILITATOR

No.	Description of Criteria
M.1	Must have delivered a minimum of thirty (30) training days within the last three (3) years as a Training Facilitator.
M.2	If online training facilitation is part of the requirement, then must have delivered a minimum of thirty (30) training hours within the last three (3) years as an Online Training Facilitator.

4.0   Deliverables - General

4.1   All documentation is to be provided in hard and/or soft copy, in the language of English or French, or both and in the format in specified with call-up / contract.

4.2   Call-ups / Contracts that specify that the eLearning products will be delivered by a LMS, must be tested and proved functional by the Offeror / Supplier prior to acceptance.

5.0   Management Requirements

5.1   Quality Assurance and Control Processes

5.1.1   As a minimum, the Offeror / Supplier must implement the Quality Assurance (QA) Plan, in order to ensure the quality of the services provided by the Offeror / Supplier. The following lists represent the acceptable criteria for eLearning products.

Level	Description
5 – System Level CATASTROPHIC	The entire application or system is unusable, catastrophic failure, usually requires restart or re-initialization or reboot.
4 – Sub-system / Module Level CRITICAL	A sub-system or module becomes unusable.
3 – Feature / Function Level SERIOUS	Feature or function does not work at all or aborts.
2 – Sub-Feature Level MINOR	A particular aspect of a function / feature does not function properly, but the overall feature / function is still usable.
1 – Formatting / Cosmetic SIMPLE	The layout or format of data, reports, messages, screens and other cosmetic issues require changing; no impact on usability. If there is an impact on usability, then the error may need to be reclassified at a higher level.

Acceptance Testing	
Validation Testing	No Level 5 errors by the start of System Testing
System Testing	No Level 4 errors by the start of Alpha Testing
Alpha Testing	No Level 3 errors by the start of Beta Testing
Release	Only Level 2 and Level 1 errors remain

5.2 Project Management

5.2.1   The Offeror / Supplier must provide status report(s) to the Technical Authority as and when requested and on the date(s) specified in the requirement, which must include as a minimum:

a. A summary of the work accomplished to date, using a Gantt chart. This summary must include the identification of personnel, and hours expended on each task, the progress report must highlight:

       i.   Tasks completed;

     ii.   Effort expended thus far;

    iii.   Estimate of additional work needed to complete the deliverable/task;

    iv.   Details of issues/problems encountered with proposed solutions;

    v.   Proposed changes to the work plan with reasons;

    vi.   Issues must be identified by one of three level indicators:

          §   GREEN - on schedule,

          §   YELLOW - minor issue that will not affect the deliverable date, and

          §   RED - major issues which may impact deliverables.

    b. The Offeror / Supplier must schedule status meetings on a regular basis as defined during the project kick-off meeting.

6.0   Work Location

6.1   Unless specified otherwise in any resultant call-up / Contract, the Work will be performed at the Offeror / Supplier's own place of business or offices and the Offeror / Supplier must provide adequate work space, office equipment and must furnish its own test and development hardware and software prior to implementation, to ensure the uninterrupted flow of contracted services and related deliverables at no additional cost to Canada. The Client Department will provide access (if available) to the Pre-Production / Test environment to the Offeror / Supplier.

7.0   Location of Meetings

7.1 In the event that meetings are required under a project, they must be conducted at facilities provided by Canada or the Offeror / Supplier. In the latter case, the Offeror / Supplier must provide all facilities and resources required for the conduct of the meeting, at no additional cost to Canada.

8.0   Network Access and Security

8.1 While working on any Government of Canada computer, server, or network, the Offeror / Supplier's personnel must abide by Internet and network access policies and codes of conduct (as provided at the time of any resultant call-up / contract). All requests for access to the network must be approved by Canada. The Offeror / Supplier must not modify user access or security settings without prior written authorization from the Client Department's network administrators.

Appendix 1 to Annex A

1.0   Description of Blended Learning and eLearning

1.1   Blended Learning and eLearning

1.1.1   Blended Learning usually combines traditional classroom based learning with more modern technology enabled methods and may include various types of eLearning products.

1.2   eLearning Products

1.2.1   Canada focuses on the broadest view of eLearning products that includes stand-alone, self-directed eLearning products to integrated, blended and hybrid approaches that combine a variety of delivery methods, tools, learning events and learning models, including:

1. CBT (not Web based, files reside on PC or CD-ROM);
2. Self-directed Web Based CBT (Running through web-browser, files reside on PC or CD-ROM);
3. Self-directed Web-based Training (Browser-based, files reside on server, runs over Internet and/or Intranet);
4. Synchronous / Virtual Classroom / Webinar. Design and development aspect, but not delivery aspect;
5. Asynchronous online discussions/learning. Design and development aspect, but not delivery aspect;
6. Hybrid (face to face classroom and online training). Design and development aspect, but not the delivery aspect;
7. Electronic Performance Support (EPS);
8. Online Communities of Practice;
9. Blogs, wikis;
10. Podcasts, webcasts;
11. E-Library (online interactive manuals, references, etc);
12. Serious gaming products;
13. Synthetic environments (2D and/or 3D);
14. Simulations;
15. Multi-Media portions of traditional classroom-based courses; and
16. M-learning (mobile learning).

1.3   Learning Product Characteristics

1.3.1   Learning products have the following characteristics:

a.   Interactive (learner to learner, learner to instructor, learner to mentor, learner to coach, learner to information database);
b.   Based on formal instructional design incorporating research-based learning models or products to support learning such as job aides and knowledge repositories depending on requirements. Incorporating a variety of instructional approaches, including examples, problems, presentation and demonstration, practice and feedback, scenarios, case studies, role-play, simulation, assessment etc;
c.   Integrated within a strategic learning and/or eLearning framework;
d.   ELearning may be developed to SCORM specifications depending on requirements; and

1.4   ELearning Product Delivery Methods

1.4.1   ELearning solutions may be provided to Canada via the following channels:

    a.   Intranet, Internet, and/or CD-ROM;
    b.   Government owned or contracted legacy LMS/LCMS;
    c.   an asynchronous/synchronous tool; or as a
    d.   stand-alone product.

1.5   Multi-Media Integration

1.5.1   ELearning products will require integration of a variety of Multi-Media/interactive elements depending on requirements, which may include one or more of the following:

    a.   Text, graphics, video, sound,
    b.   Pop-up boxes and roll-overs,
    c.   Navigation features (forward, back, return to main menu, exit, book-marking),
    d.   Changing content organization depending on results of pre-assessment tests,
    e.   Drag-and-drop exercises,
    f.   Multiple choice and true/false questions,
    g.   Feedback on questions linked to area in courseware with the answer,
    h.   Exploratory functions - hot areas on screen,
    i.   Text entry for simple word recall, longer answer responses, or gather user information such as passwords,
    j.   Sliders - to allow user to select a choice or range of choices on a linear scale,
    k.   Timers - indicate passing time as user completes an exercise,
    l.   Simple simulations such as demonstrating sequence of keystrokes to perform basic commands in a software application,
    m.   Basic animations,
    n.   Testing, scoring, course management (tracking and reporting), and
    o.   Operational support (help, search (full-text and keyword based on metadata), glossary, dialogue boxes).

Delivery Platform Independence

1.6.1   ELearning products must be able to be delivered through multiple mechanisms (e.g. CBT, WBT). The solution must allow the ability to choose delivery mechanisms.

1.7   Dynamic Content and Flexible Architecture

1.7.1   Unless stated otherwise in any resultant call-up / contract,

    a.   ELearning solutions must accommodate dynamic content. The solutions must permit changes to the underlying information (text and graphics/illustrations) while minimizing changes to the product.

    b.   ELearning solutions must accommodate changes to the overall architecture (beyond the information itself) in that new modules or components will need to be added and existing modules or components changed or discarded.

1.8   Easy to Navigate and Maintain Information Structures

1.8.1   Information structures must be easily and intuitively navigable by novice users. The information and navigation structures must be easy to maintain.

1.9   **Media and Delivery Mechanisms**

1.9.1   The internet/intranet using browser technology will be used as the delivery environment. The product must support the applicable browser(s) as stated in the resulting call-up / contract. Unless stated otherwise in any resultant call-up / contract, plug-ins will not be permitted.

1.10   **Reusability**

1.10.1   The Offeror / Supplier must design with re-usability in mind. Content must be designed as reusable information objects that can be used as modular building blocks for larger learning structures such as lessons (Reusable Learning Objects). The use of metadata tags to describe information and learning objects facilitate rapid updating, searching, and management of content.

1.11   **Performance Tracking and Assessment**

1.11.1   The approach and extent of performance data collected will be a function of eLearning product requirements and the IM/IT infrastructure.

1.11.2   Performance Tracking and Assessment functionality may be required to conform to SCORM as identified in any resultant call-up / contract. Use of API calls falling under SCORM conformance must only be used if required by the client.

1.11.3   Performance Tracking and Assessment functionality may include any or all of the following:

  a.   Performance assessment in a learning context;
  b.   Basic student survey technique, collecting subjective data;
  c.   Advanced forms of data collection including the use of a database;
  d.   Collection of objective data, such as completion rates and times; and
  e.   Ability to track the student's progress, to help them keep track of test scores and evaluations.

1.12   **Searching**

1.12.1   The approach and extent of eLearning product search functionality will be a function of the eLearning product requirements and the IM/IT infrastructure.

1.12.2   Searching capabilities can range from full-text searching within a product or directory, to field-based searching using metadata at the module, topic, sub-topic and keyword levels.

Appendix 2 to Annex A

ACRONYMS

ADDE	- Analysis Design Development Evaluation
ADL	- Advanced Distributed Learning
ADM	- Assistant Deputy Minister
AICC	- Aviation Industry CBT Committee
API	- Application Programming Interface
CBT	- Computer-based training
CF	- Canadian Forces
CFITES	- Canadian Forces Individual Training and Education System
CLF	- Common Look and Feel
DLN	- Defence Learning Network
DND	- Department of National Defence
EPS	- Electronic Performance Support
FoB	- Freight on Board
GoC	- Government of Canada
GPNet	- General Purpose Network
HPI	- Human Performance Improvement
HPT	- Human Performance Technology
HR	- Human Resources
IAW	- In Accordance With
IM	- Information Management
IMS	- Instructional Management System
IP	- Intellectual Property
IT	- Information Technology
LCC	- Learning and Career Centers
LCMS	- Learning Content Management System
LMS	- Learning Management System
MA	- Managing Authority
NCR	- National Capital Region
O/S	- Operating System
PC	- Personal Computer
PMI	- Project Management Institute
PMO	- Project Management Office
PMP	- Project Management Professional
PoC	- Proof of Concept
PS	- Public Service
QA	- Quality Assurance
RFSO	- Request for Standing Offer
ROI	- Return on Investment
SCO	- Shareable Content Object
SCORM	- Shareable Content Object Reference Model
SOW	- Statement of Work
WBT	- Web-based training
WCAG	- Web Content Accessibility Guidelines

ANNEX B
GENERIC SECURITY REQUIREMENTS CHECKLISTS

The list and details of the 31 pre-approved SRCL's for professional services is available for download from the CPSS website: http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/31-eng.html

ANNEX C
INSURANCE REQUIREMENTS

A. The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than $2,000,000 per accident or occurrence and in the annual aggregate.

B. The Commercial General Liability Insurance policy must include the following:

1. Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.

2. Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.

3. Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.

4. Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.

5. Cross Liability/Separation of Insured: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.

6. Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.

7. Employees and, if applicable, Volunteers must be included as Additional Insured.

8. Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)

9. Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.

10. Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.

11. If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.

12. Non-owned Automobile Liability - Coverage for suits against the Contractor resulting from the use of hired or non-owned vehicles.

ANNEX E
BASIS OF PAYMENT
(SUPPLY ARRANGEMENT (SA))

Basis of Payment identifies, at time of issuance of the Supply Arrangement, the qualified Categories by Region, Metropolitan area and level of expertise.

ANNEX H
SAMPLE QUARTERLY USAGE REPORT
(SUPPLY ARRANGEMENT (SA))

See Attached

ANNEX I
CLIENT SATISFACTION FORM
(SUPPLY ARRANGEMENT (SA))

The Client Satisfaction Form is available for download from the CPSS website:
http://publiservice.tpsgc-pwgsc.gc.ca/acquisitions/text/spc-cps/saannexi-saannexi-e.html