



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

**SOLICITATION AMENDMENT
MODIFICATION DE L'INVITATION**

The referenced document is hereby revised; unless otherwise indicated, all other terms and conditions of the Solicitation remain the same.

Ce document est par la présente révisé; sauf indication contraire, les modalités de l'invitation demeurent les mêmes.

Comments - Commentaires

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

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

Title - Sujet RETIREMENT COURSE	
Solicitation No. - N° de l'invitation EN519-162699/A	Amendment No. - N° modif. 004
Client Reference No. - N° de référence du client 20162699	Date 2016-11-10
GETS Reference No. - N° de référence de SEAG PW-\$\$ZH-127-30509	
File No. - N° de dossier 127zh.EN519-162699	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2016-12-05	
Time Zone Fuseau horaire Eastern Standard Time EST	
F.O.B. - F.A.B.	
Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Génier, Nicole	Buyer Id - Id de l'acheteur 127zh
Telephone No. - N° de téléphone (819) 420-2267 ()	FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction:	

Instructions: See Herein

Instructions: Voir aux présentes

Delivery Required - Livraison exigée	Delivery Offered - Livraison proposée
Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Telephone No. - N° de téléphone Facsimile No. - N° de télécopieur	
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

SOLICITATION AMENDMENT 004

In accordance with Part 2 - Article 1.4 - Enquiries - Bid Solicitation these questions and their corresponding answers are provided to all Suppliers.

SECTION A - QUESTIONS AND ANSWERS

Question 1

Why is the facilitator experience not part of the scoring grid?

Response 1

Canada did not want to force suppliers to provide specific resources at bid closing, by placing the qualifications in the SOW, this puts the onus on the company to comply and it provides more time to gather the necessary resources, which are only required at call-up issuance.

Question 2

Is the facilitator experience over the years with government (CSPS) or private sector firms other than the bidding firm considered valid experience?

Response 2

Yes. Please see changes in Part B.

Question 3

Why is the wording of the facilitator experience directly related to course titles that have been offered by one specific supplier? Does it mean that other than the PSSA/Superannuation module that must be the presentation provided by Shediac/Superannuation the other modules must be ones already delivered by an existing supplier? If so does everyone have access to these modules? Who owns the intellectual property?

Response 3

It is essential that the facilitators have experience delivering the training in the field as described in the Statement of Work. The module titles are not set in stone; it is the content of the modules that is important. We are not asking for companies to develop new training but rather a firm that has already built the product and is currently delivering it. Other than the Superannuation module, the Contractor owns the intellectual property.

Question 4

Why must the facilitators have delivered the courses by way of a call up? Does this not presume that a supplier must have had a standing offer in place with a government department to be in a position to offer a facilitator?

Response 4

Please see changes in Part B.

Question 5

Can the number of deliveries be reduced to a more reasonable number of 5-10 in total have no matter what language as long as you certify that you can or have delivered in both languages?

Response 5

Please see changes in Part B.

SECTION B – CHANGES TO THE SOLICITATION

DELETE Article 8. Facilitators Qualifications of Annex A – Statement of Work, in its entirety and REPLACE with the following:

8. FACILITATORS QUALIFICATIONS

8.1 Pay Specialist

The Certified Pay Specialist must have a certification given by Superannuation, Pension Transition and Client Services Sector (SPTCSS) of Public Works and Government Services Canada (PWGSC) to deliver retirement Planning Information Workshops on the Public Service Superannuation Act (R.S.C., 1985, c. P-36) and its provisions and regulations

The Certified Pay Specialist must have delivered at least 3 times the Module* on the Federal Public Service Pension Plan over the past 2 years.

**The duration of the Module must be at least 3 hours of instruction to a minimum of 10 Participants per session.*

8.2 Lawyer, paralegal, or notary

The Canadian Certified or licensed lawyer, paralegal, or notary must have a law degree* (e.g. Bachelor of Laws (LL.B) or Bachelor of Civil Law (B.C.L.) degree) from a recognized Canadian university or a Certificate of Qualification issued by the National Committee on Accreditation (NCA) of the Federation of Law Societies of Canada.

The Canadian Certified or licensed lawyer, paralegal, or notary must have a minimum of 3 years of experience, providing legal advice on the topic of Wills and Estate Planning within the context of preparing for retirement to groups or individuals.

The Canadian Certified or licensed lawyer, paralegal, or notary must have delivered at least 3 times the Module on Estate Planning over the past 2 years on estate planning, wills and power of attorney.

**Note: University degree and College Diploma must be from a recognized Canadian university or college, as applicable, or approved by a recognized Canadian academic credentials assessment service, if obtained outside Canada. The list of recognized organizations that can provide an academic credentials assessment service can be found at <http://www.cicic.ca/>*

The duration of the Module must be at least 3 hours of instruction to a minimum of 10 Participants per session.

8.3 Financial Planner

The Canadian Certified or licensed Financial Planner must have a certified financial planner (CFP) professional designation.

The Canadian Certified or licensed Financial Planner must have a minimum of 3 years of experience in providing advice on Income Security Programs and Financial Planning to groups or individuals.

The Canadian Certified or licensed Financial Planner must have delivered at least 3 times the Module on Financial Planning over the past 2 years on financial planning.

The duration of the Module must be at least 3 hours of instruction to a minimum of 10 Participants per session.

8.4 Nurse, dietitian, or medical doctor

The Canadian licensed or certified nurse, dietician, nutritionist or medical doctor must have a minimum of 3 years of experience providing advice on health and healthy aging to groups or individuals.

The Canadian licensed or certified nurse, dietician, nutritionist or medical doctor must have delivered at least 3 times the Module on Health and Nutrition over the past 2 years on physical health and well-being.

The duration of the Module must be at least 1.5 hours of instruction to a minimum of 10 Participants per session.

8.5 Psychologist or Psychological associate

The Canadian Certified or licensed Psychologist or Psychological associate must have a Bachelor degree* in Psychology.

The Canadian Certified or licensed Psychologist or Psychological associate must have a minimum of 3 years of experience in providing psychological counselling services to groups or individuals.

The Canadian Certified or licensed Psychologist or Psychological associate must have delivered at least 3 times the Module on – Psychological Aspects of Retirement over the past 2 years on the psychological and sociological aspects of retirement.

*Note: University degree and College Diploma must be from a recognized Canadian university or college, as applicable, or approved by a recognized Canadian academic credentials assessment service, if obtained outside Canada. The list of recognized organizations that can provide an academic credentials assessment service can be found at <http://www.cicic.ca/>

The duration of the Module must be at least 1.5 hours of instruction to a minimum of 10 Participants per session.

DELETE MT3 in Attachment 1 to Part 3, Technical Evaluation Criteria, and REPLACE with the following:

MT3	<p>The Offeror must demonstrate that they have delivered the proposed workshop on 10 separate occasions with a minimum of 2 in French since January 2013.</p> <p>The proposed workshop must have been delivered in a classroom setting to an external client for a minimum of 10 participants.</p> <p>The Offeror must provide the following information for each delivery:</p> <ul style="list-style-type: none">a) Name of the client organization;b) Workshop date;c) Language;d) Client contact that can confirm the delivery of the workshop. Offeror should provide the name, telephone number or email. <p>External clients is define as clients that are external to the offeror's organization. Parent companies, affiliates, and subsidiaries are considered internal.</p>
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