

**RETURN BIDS TO :**

**RETOURNER LES  
SOUMISSIONS À:**

Shared Services Canada  
180 Kent Street, 13<sup>th</sup> Floor  
Ottawa, ON K1G 4A8  
Megan.Lamont@ssc-spc.gc.ca

**REQUEST FOR PROPOSAL  
DEMANDE DE PROPOSITION**

**Proposal To: Shared Services Canada**

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

**Proposition aux: Services partagés Canada**

**Nous** offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées

**Instructions : See Herein**

ou incluses par référence dans la présente et aux annexes ci-jointes, les biens, services et construction

**Instructions: Voir aux présentes**

énumérés ici sur toute feuille ci-annexées, au(x) prix indiqué(s)

**Comments - Commentaires**

**This document contains a Security  
Requirement**

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

**Issuing Office – Bureau de distribution**  
Shared Services Canada  
180 Kent Street  
Ottawa, ON K1G 4A8

<b>Title – Sujet</b> ITIL Training	
<b>Solicitation No. – N° de l'invitation</b> 2B0KB-16-02373	<b>Date</b> October 21, 2016
<b>Client Reference No. – N° référence du client</b> R2373	
<b>GETS Reference No. – N° de reference de SEAG</b> n/a	
<b>File No. – N° de dossier</b> R2373	<b>CCC No. / N° CCC - FMS No. / N° VME</b>
<b>Solicitation Closes – L'invitation prend fin</b> at – à 02:00 PM on – le December 6, 2016	<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Standard Time EST
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input checked="" type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Inquiries to : - Adresser toutes questions à:</b> Megan Lamont	<b>Buyer Id – Id de l'acheteur</b> CAU
<b>Telephone No. – N° de téléphone :</b> 613-219-7204	<b>FAX No. – N° de FAX</b> 613-960-6007
<b>Destination – of Goods, Services, and Construction:</b> <b>Destination – des biens, services et construction :</b> See Herein	
<b>Delivery required - Livraison exigée</b> See Herein	<b>Delivered Offered – Livraison proposée</b>
<b>Vendor/firm Name and address</b> <b>Raison sociale et adresse du fournisseur/de l'entrepreneur</b>	
<b>Facsimile No. – N° de télécopieur</b> <b>Telephone No. – N° de téléphone</b>	
<b>Name and title of person authorized to sign on behalf of Vendor/firm (type or print)-</b> <b>Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur (taper ou écrire en caractères d'imprimerie)</b>	
<b>Signature</b>	<b>Date</b>



**PART 1 - GENERAL INFORMATION ..... 4**

1.1 INTRODUCTION.....4

1.2 SUMMARY .....4

1.3 DEBRIEFINGS.....5

**PART 2 - BIDDER INSTRUCTIONS ..... 6**

2.1 STANDARD INSTRUCTIONS, CLAUSES AND CONDITIONS .....6

2.2 SUBMISSION OF BIDS .....6

2.3 FORMER PUBLIC SERVANT.....6

2.4 ENQUIRIES - BID SOLICITATION.....6

2.5 APPLICABLE LAWS.....7

2.6 IMPROVEMENT OF REQUIREMENT DURING SOLICITATION PERIOD.....7

**PART 3 - BID PREPARATION INSTRUCTIONS ..... 8**

3.1 BID PREPARATION INSTRUCTIONS .....8

**PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION .....12**

4.1 EVALUATION PROCEDURES.....12

4.2 BASIS OF SELECTION .....12

**PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION .....19**

5.1 CERTIFICATIONS REQUIRED WITH THE BID .....19

5.2 CERTIFICATIONS PRECEDENT TO CONTRACT AWARD AND ADDITIONAL INFORMATION .....19

**PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS.....25**

6.1 SECURITY REQUIREMENTS .....25

**PART 7 - RESULTING CONTRACT CLAUSES .....26**

7.1 STATEMENT OF WORK.....26

7.2 STANDARD CLAUSES AND CONDITIONS.....28

7.3 SECURITY REQUIREMENTS .....28

7.4 TERM OF CONTRACT .....28

7.5 AUTHORITIES .....29

7.6 PROACTIVE DISCLOSURE OF CONTRACTS WITH FORMER PUBLIC SERVANTS .....30

7.7 PAYMENT .....30

7.8 INVOICING INSTRUCTIONS .....31

7.9 CERTIFICATIONS AND ADDITIONAL INFORMATION.....32

7.10 APPLICABLE LAWS.....32

7.11 PRIORITY OF DOCUMENTS .....32

7.12 FOREIGN NATIONALS (CANADIAN CONTRACTOR OR FOREIGN CONTRACTOR).....32

7.13 INSURANCE .....32

**ANNEX “A” .....33**

STATEMENT OF WORK .....33

**ANNEX “B” .....38**

BASIS OF PAYMENT .....38

**ANNEX “C” .....40**

INTEGRITY CHECK .....40



**ANNEX "D" .....41**  
**TASK AUTHORIZATION FORM..... ERROR! BOOKMARK NOT DEFINED.1**



## **PART 1 - GENERAL INFORMATION**

### **1.1 Introduction**

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

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

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

### **1.2 Summary**

- 1.2.1 The Shared Services Canada (SSC) Transformation Initiative, Service Management Improvement, centers on improving the branch's service management activities. ITIL is the reference framework being utilized for this endeavour, in alignment with TBS. ITIL is the de facto international standard framework for best practices in IT Service Management. ITIL contains a comprehensive description of the processes involved in managing IT services. SSC requires a contractor to deliver a series of instructor led in-class or virtual training courses on this topic.
- 1.2.2 The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), and the Agreement on Internal Trade (AIT).
- 1.2.3 This bid solicitation is to establish a contract with task authorizations (TA) for the delivery of the requirement detailed in the bid solicitation, to the Identified Users across Canada, excluding locations within Yukon, Northwest Territories, Nunavut, Quebec, and Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirement for deliveries within CLCAs areas within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador will have to be treated as a separate procurement, outside the resulting contract.



### **1.3 Debriefings**

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



## **PART 2 - BIDDER INSTRUCTIONS**

### **2.1 Standard Instructions, Clauses and Conditions**

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

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

The 2003 (2016-04-04) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

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

Delete: 60 days

Insert: 120 days

#### **2.1.1 SACC Manual Clauses**

4006 (2010-08-16) Contractor to Own Intellectual Property Rights in Foreground Information  
K3002C (2008-05-12) Contractor to own IP: No Explicit License Rights for Canada

### **2.2 Submission of Bids**

Bids must be submitted only to Shared Services Canada (SSC) by the date, time and place indicated on page 1 of the bid solicitation.

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

### **2.3 Former Public Servant**

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

### **2.4 Enquiries - Bid Solicitation**

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

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



## **2.5 Applicable Laws**

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

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

## **2.6 Improvement of Requirement During Solicitation Period**

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reason for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority at least 10 days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.



## **PART 3 - BID PREPARATION INSTRUCTIONS**

### **3.1 Bid Preparation Instructions**

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

Section I: Technical Bid (3 hard copies and 1 soft copy on CD/DVD)

Section II: Financial Bid (3 hard copies and 1 soft copy on CD/DVD)

Section III: Certifications (1 hard copy and 1 soft copy on CD/DVD)

If there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

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

Canada requests that Bidders follow the format instructions described below in the preparation of their bid:

- (a) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- (b) use a numbering system that corresponds to the bid solicitation.

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 [Policy on Green Procurement](http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, Bidders 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.

#### **Section I: Technical Bid**

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

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

Part 4, Evaluation Procedures and Attachment 1 to Part 4, contain additional instructions that bidders should consider when preparing their technical bid.





## **Section II: Financial Bid**

1. Bidders must submit their financial bid in Canadian funds and in accordance with the pricing schedule detailed in Attachment 1 to Part 3. The total amount of Applicable Taxes must be shown separately.
2. Bidders must submit their (price(s) and/or rate(s)), FOB destination; Canadian customs duties and excise taxes included, as applicable; and GST or HST excluded.
3. When preparing their financial bid, bidders should review the basis of payment in Annex B and clause 1.2, Financial Evaluation, of Part 4.
4. Bidders should include the following information in their financial bid:

Their legal name;

1. Their Procurement Business Number (PBN); and
2. The name of the contact person (including this person's mailing address, phone and facsimile numbers and email address) authorized by the Bidder to enter into communications with Canada with regards to:
  - a. their bid; and
  - b. any contract that may result from their bid.

## **Section III: Certifications**

Bidders must submit the certifications and additional information required under Part 5.

### **3.1.1 Exchange Rate Fluctuation**

C3011T (2013-11-06), Exchange Rate Fluctuation



**ATTACHMENT 1 TO PART 3  
PRICING SCHEDULE**

- 1.0 The Bidder must complete this pricing schedule and include it in its financial bid.
- 2.0 The price/rates specified below, when quoted by the Bidder, includes the total estimated cost of all travel and living expenses that may need to be incurred for:
  - a. work described in Part 7, Resulting Contract Clauses, of the bid solicitation required to be performed within the National Capital Region (NCR). The NCR is defined in the *National Capital Act*, R.S.C. 1985, c. N-4, S.2. *The National Capital Act* is available on the Justice Website: <http://laws.justice.gc.ca/en/N-4/>;
  - b. travel between the successful bidder's place of business and the NCR; and
  - c. the relocation of resources to satisfy the terms of any resulting contract. These expenses cannot be charged directly and separately from the professional fees to any contract that may result from the bid solicitation.
- 3.0 The inclusion of volumetric data in this document does not represent a commitment by Canada that Canada's future usage of the services described in the bid solicitation will be consistent with this data.
- 4.0 Pricing Schedule:

**All Courses will be minimum 6, maximum 15 participants.**

**4.1 Date of Contract Award to March 31, 2018**

<b>National Capital Region</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		7	
ITIL Lifecycles – Service Operations		1	
ITIL Lifecycles – Service Transition		1	
ITIL Lifecycles – Service Design		1	
ITIL Lifecycles - Continual Service Improvement		1	
ITIL Lifecycles - Service Strategy		1	

<b>Ontario (Belleville, Toronto)</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		1	



<b>Quebec (Montreal, Quebec City)</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		4	

<b>Manitoba (Winnipeg)</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		1	

<b>Saskatchewan (Regina)</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		1	

<b>Western Region (Vancouver, BC, Edmonton, AB)</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		1	

<b>Atlantic Region (Halifax, NS, Moncton, NB, St. John's, NF)</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		1	

<b>GRAND TOTAL:</b>	
---------------------	--



**4.2 April 1, 2018 to March 31, 2019**

<b>National Capital Region</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		7	
ITIL Lifecycles – Service Operations		1	
ITIL Lifecycles – Service Transition		1	
ITIL Lifecycles – Service Design		1	
ITIL Lifecycles - Continual Service Improvement		1	
ITIL Lifecycles - Service Strategy		1	

<b>Ontario (Belleville, Toronto)</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		1	

<b>Quebec (Montreal, Quebec City)</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		4	

<b>Manitoba (Winnipeg)</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		1	

<b>Saskatchewan (Regina)</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		1	



<b>Western Region (Vancouver, BC, Edmonton, AB)</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		1	

  

<b>Atlantic Region (Halifax, NS, Moncton, NB, St. John's, NF)</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		1	

  

<b>GRAND TOTAL:</b>			
---------------------	--	--	--



**4.3 April 1, 2019 to March 31, 2020**

<b>National Capital Region</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		7	
ITIL Lifecycles – Service Operations		1	
ITIL Lifecycles – Service Transition		1	
ITIL Lifecycles – Service Design		1	
ITIL Lifecycles - Continual Service Improvement		1	
ITIL Lifecycles - Service Strategy		1	

<b>Ontario (Belleville, Toronto)</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		1	

<b>Quebec (Montreal, Quebec City)</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		4	

<b>Manitoba (Winnipeg)</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		1	

<b>Saskatchewan (Regina)</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		1	



<b>Western Region (Vancouver, BC, Edmonton, AB)</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		1	

<b>Atlantic Region (Halifax, NS, Moncton, NB, St. John's, NF)</b>			
<b>Course</b>	<b>Cost</b>	<b>Quantity</b>	<b>Total</b>
ITIL Foundations		1	

<b>GRAND TOTAL:</b>		
---------------------	--	--



## **PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION**

### **4.1 Evaluation Procedures**

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

#### **4.1.1 Technical Evaluation**

##### **4.1.1.1 Mandatory Technical Criteria**

Refer to Attachment 1 to Part 4.

##### **4.1.1.2 Point Rated Technical Criteria**

Refer to Attachment 1 to Part 4. Point-rated technical criteria not addressed will be given a score of zero.

#### **4.1.2 Financial Evaluation**

The volumetric data included in the pricing schedule detailed in Attachment 1 to Part 3 are provided for bid evaluated price determination purposes only. They are not to be considered as a contract guarantee.

SACC Manual Clause [A0220T](#) (2014-06-26), Evaluation of Price

SACC Manual Clause [A0222T](#) (2014-06-26), Evaluation of Price

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

#### **4.2.1** To be declared responsive, a bid must:

- (a) comply with all the requirements of the bid solicitation;
- (b) meet all the mandatory evaluation criteria; and
- (c) obtain the required minimum number of points specified in Attachment 1 to Part 4 for the point rated technical criteria.

#### **4.2.2** Bids not meeting (a) or (b) or (c) will be declared non-responsive.

#### **4.2.3** The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.

#### **4.2.4** To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%.

#### **4.2.5** To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.

#### **4.2.6** For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.

#### **4.2.7** Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.





The table below illustrates an example where the selection of the contractor is determined by a 70/30 ratio of the technical merit and price, respectively.

<b>Basis of Selection - Highest Combined Rating of Technical Merit (70%) and Price (30%)</b>			
<b>Bidder</b>	<b>Bidder 1</b>	<b>Bidder 2</b>	<b>Bidder 3</b>
<b>Overall Technical Score</b>	76	82	88
<b>Bid Evaluated Price</b>	C\$50,000	C\$55,000	C\$60,000
<b>Calculations</b>	<b>Technical Merit Points</b>	<b>Price Points</b>	<b>Total Score</b>
<b>Bidder 1</b>	$76 / 100 \times 70 = 53.2$	$50,000^* / 50,000 \times 30 = 30.00$	83.2
<b>Bidder 2</b>	$82 / 100 \times 70 = 57.4$	$50,000^* / 55,000 \times 30 = 27.27$	84.67
<b>Bidder 3</b>	$88 / 100 \times 70 = 61.6$	$50,000^* / 60,000 \times 30 = 25$	86.6



## ATTACHMENT 1 TO PART 4 TECHNICAL CRITERIA

The Bidder must provide the necessary documentation to support compliance with this requirement.

- a. The Bidder is advised that only listing experience without providing any supporting data to describe where and how such experience was obtained will not constitute “demonstrated” for the purpose of the evaluation.
- b. The Bidder must clearly demonstrate in the proposal how the experience was gained or knowledge was attained, supported by resumes and any necessary supporting documentation.
- c. The Bidder must provide complete details as to where, when and how (through which activities/responsibilities) the stated qualifications/experience were obtained. In order to demonstrate when experience was obtained, the bidder must indicate the duration of such experience, specifying the start and end dates (month and year at a minimum). In the case where the timelines of two or more projects or experience overlap, the duration of time common to each project/experience will not be counted more than once.
- d. It is recommended that the Bidder include a grid in their proposals, cross-referencing statements of compliance with the supporting data and resume evidence contained in their proposals. Note: the compliance grid, by and of itself DOES NOT constitute demonstrated evidence. As stated in bullet “b” above, the resumes and supporting documentation will be accepted as evidence.

Bidders should provide the required references in the Technical Proposal of their bid.

The references provided by the Bidders are subject to verification by Canada during the bid evaluation period (before award of a contract) and after award of a contract. The Contracting Authority will have the right to ask for additional information to validate the references before award of a contract. The bid will be declared non-responsive if any references given by the Bidder are untrue, whether made knowingly or unknowingly. Failure to comply with the request of the Contracting Authority for additional information will also render the bid non-responsive.

For Mandatory Technical Criteria and Point Rated Technical Criteria listed below requiring Project Summaries, the Bidder and its proposed resource(s) should provide:

- Name and description of client organization;
- Name, phone, email of client ;
- Scope, objective, size in dollars and resources, project timeframe (from-to dates month/year);
- Outcomes of the project; and/or
- Description of the Consultant roles and responsibilities in the project.



**Mandatory Technical Criteria**

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

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

For the purpose of the mandatory technical criteria specified below, the experience of the Bidder\* will be considered.

\* "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.

No.	Description	Met / Not Met	Cross Reference to Proposal
M1	<p>The Bidder <b>MUST</b> have a Minimum of 3 years' experience teaching ITIL/ITSM courses</p> <p>In order to demonstrate the criteria listed above, the Bidder's proposal <b>MUST</b> include the following information:</p> <ul style="list-style-type: none"> <li>• PBN# of company</li> <li>• The bidder's public course schedule for 2014, 2015 and 2016 (provide a link to or brochure of public course schedule for verification)</li> </ul>		
M2	<p>The Bidder <b>MUST</b> have provided courses at least five times in the last 3 years, of which two were ITIL/ITSM courses.</p> <p>In order to demonstrate the criteria listed above, the Bidder's proposal <b>MUST</b> include the following information:</p> <ul style="list-style-type: none"> <li>• The description of the training provided both publicly and privately in 2014, 2015-2016.</li> <li>• The name of three client organization(s), including course name and course date to whom the ITIL frameworks training was privately rendered in 2014, 2015 or 2016</li> </ul>		
M3	<p>The Bidder <b>MUST</b> provide certification that their company is an accredited training partner with AXELOS, and provide copies of instructor's certifications and accreditations. The term instructor refers to individuals hired by the bidder to provide training on behalf of the bidder.</p> <p>In order to demonstrate the criteria listed above, the Bidder's proposal <b>MUST</b> include the following information:</p> <ul style="list-style-type: none"> <li>• Copy of certificate that the bidder is accredited to deliver the specified courses</li> <li>• Copies of instructor's certificates and accreditations.</li> </ul>		



<b>M4</b>	The Bidder <b>MUST</b> provide the CV's of two (2) instructors who the Bidder intends to use to deliver the training. The term instructor refers to individuals hired by the bidder to provide training on behalf of the bidder.  <i>Note: Only 2 CVs will be accepted for evaluation purposes. All information must be in the CV's.</i>		
<b>M4.1</b>	Each proposed instructor must demonstrate at least two (2) years' experience teaching in the field of ITIL Service management and successful delivery of at least five (5) ITIL courses to private or public organizations.		
<b>M4.2</b>	At least one instructor <b>MUST</b> have the capability of delivering the courses in English and in French.		
<b>M4.3</b>	Each proposed instructor <b>MUST</b> be certified to the v3 Expert level, plus hold AXELOS certification for each Intermediate level course requested in this RFP		
<b>M5</b>	The Bidder <b>MUST</b> submit manuals for one course in either English or French. The manuals must contain the course content on Service management training listed in Annex "A" - Course Content.		



**Point Rated Technical Criteria**

Bids which meet all the mandatory technical criteria will be evaluated and scored as specified in the tables inserted below.

Bids which fail to obtain the required minimum number of points specified will be declared non-responsive. Each point rated technical criterion should be addressed separately.

No.	Rated Evaluation Criteria		Referenced Section/Page in Bidder's Proposal
<b>R1</b>	<b>R-1 Stability of current management structure</b>		
<b>R1.1</b>	The bidder should demonstrate number of years providing IT training:  1 year = 2 points 2 years = 4 points 3 years = 6 points 4+ years = 8 points		
<b>R2</b>	The CV's provided in M4 should describe all Academic and/or Professional qualifications attained by each of the two proposed instructors in the field of ITIL training.		
<b>R2.1</b>	Each proposed instructor will be awarded points for education:  Master's or PhD = 4 points Bachelor's Degree = 3 points  College Diploma = 2 points  Maximum points per instructor = 4 points		
<b>R2.2</b>	Each proposed instructor should have training experience in ITIL/ITSM in the past 5 years.  1 course = 1 point 2 courses = 2 points 3 courses = 3 points 4 courses = 4 points 5 courses = 5 points  Maximum per instructor = 5 points		
<b>R2.3</b>	Each proposed instructor should be bilingual and able to instruct in a bilingual environment.  2 bilingual instructors = 10 points		
<b>R3</b>	<b>The manuals submitted in M5 will be rated according to the following criteria:</b>		
<b>R3.1</b>	<del>The bidder should submit documentation that adheres to courses listed in RFP.</del>  <del>1 point deduction for every missing element from the listed course requirements.</del> <del>Maximum 10 points</del>		
<b>R3.2</b>	The bidder should submit documentation that contains case studies.		



	1 point per case study up to 6, 2 additional points for having a case study in each course. Maximum 8 points		
<b>R3.3</b>	The bidder should submit documentation that contains examples of actual situations or best practices in the field of ITIL and ITSM.  1 point per example Maximum 5 points		
<b>R3.4</b>	The bidder should submit documentation that is structured to address the varying learning styles of adult learners For example, break out discussions, role playing, practical application, lecturing.  2 points		
<b>R3.5</b>	The bidder should submit documentation that contains a table of contents.  2 points		
<b>R3.6</b>	The bidder should submit documentation that contains for reference material, cited in the course manual or in separate reference guide.  5 points		
<b>R3.7</b>	Eight (8) points can be awarded for quality of documentation. 2 points for clarity of language 2 points for engaging format (text should be broken up into sections diagrams should be used where appropriate) 2 points for durability of the documentation (participants should be able to keep the documentation and refer back to it after the course) 2 points for accessibility to learners with disabilities (Larger print or electronic copies that can be read using the JAWS program for the visually impaired.)  Maximum 8 points		
<b>R3.8</b>	The bidder should submit documentation that contains learning objectives and learning summary for each section that are clearly defined.  1 point per course Maximum 6 points		
	<b>TOTAL</b> <b>MAXIMUM POINTS = 72</b>		



## **PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION**

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

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

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

### **5.1 Certifications Required with the Bid**

Bidders must submit the following duly completed certifications as part of their bid.

#### **5.1.1 Integrity Provisions - Declaration of Convicted Offences**

In accordance with the *Ineligibility and Suspension Policy* (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Bidder must provide with its bid the required documentation, as applicable, to be given further consideration in the procurement process.

#### **5.1.2 Additional Certifications Required with the Bid**

Bidders must submit as part of their bid the certifications included in Attachment 1 to Part 5, Certifications Required with the Bid, duly completed.

### **5.2 Certifications Precedent to Contract Award and Additional Information**

The certifications and additional information listed below should be submitted with the bid but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame specified will render the bid non-responsive.

#### **5.2.1 Integrity Provisions – Required Documentation**

In accordance with the *Ineligibility and Suspension Policy* (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

#### **5.2.2 Federal Contractors Program for Employment Equity - Bid Certification**

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the bottom of the page of the Employment and Social Development Canada (ESDC) - Labour's website ([http://www.esdc.gc.ca/en/jobs/workplace/human\\_rights/employment\\_equity/federal\\_contractor\\_program.page?&\\_ga=1.229006812.1158694905.1413548969#afed](http://www.esdc.gc.ca/en/jobs/workplace/human_rights/employment_equity/federal_contractor_program.page?&_ga=1.229006812.1158694905.1413548969#afed)).

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list at the time of contract award.



Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification, before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

### **5.2.3 Additional Certifications Precedent to Contract Award**

#### **5.2.3.1 Status and Availability of Resources**

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

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

#### **5.2.3.2 Education and Experience**

*SACC Manual* clause A3010T (2010-08-16) Education and Experience





**ATTACHMENT 1 TO PART 5  
CERTIFICATIONS PRECEDENT TO CONTRACT AWARD**

**1. Federal Contractors Program**

**1.1 Federal Contractors Program For Employment Equity - Certification**

Insert the date: Date: \_\_\_\_\_ (YYYY/MM/DD) If left blank, the date will be deemed to be the bid solicitation closing date.

The Bidder must complete A and B.

A. The Bidder must include in the certification one of the following statements:

A1. The Bidder is not a Joint Venture. \_\_\_\_\_

A2. The Bidder is a Joint venture. \_\_\_\_\_

B. The Bidder must include in the certification: "I, the Bidder, submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated above. The certifications provided to Canada are subject to verification at all times. I understand that Canada will declare a bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with such request by Canada will also render the bid non-responsive or will constitute a default under the Contract."

For A1, the Bidder must include in the certification: "The Bidder:" followed by the applicable statement among the statements B.1 to B.5 appearing below.

For A2: the Bidder must include in the certification for each member of the Joint Venture: 1) "I, [insert the name of the member of the Joint Venture], member of the Joint Venture: " followed by the applicable statement among the statements B.1 to B.5 appearing below.

Choose only one of the following statements:

B1. certifies having no work force in Canada.

B2. certifies being a public sector employer.

B3. certifies being a federally regulated employer being subject to the Employment Equity Act.

B4. certifies having a combined work force in Canada of less than 100 employees (combined work force includes: permanent full-time, permanent part-time and temporary employees [temporary employees only includes those who have worked 12 weeks or more during a calendar year and who are not full-time students]).

B5. certifies having a combined workforce in Canada of 100 or more employees; and

B5.1. certifies already having a valid and current Agreement to Implement Employment Equity (AIEE) in place with HRSDC-Labour.

or



B5.2. certifies having submitted the Agreement to Implement Employment Equity (LAB1168) to HRSDC-Labour. As this is a condition precedent to contract award, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to HRSDC-Labour.

For further information on the Federal Contractors Program for Employment Equity visit HRSDC-Labour's website.

## 1.2 Former Public Servants Certification

Contracts with former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny and reflect fairness in spending public funds. In order to comply with Treasury Board policies and directives on contracts with FPS, bidders must provide the information required below.

### Definitions

For the purposes of this clause,

"former public servant" means a former member of a department as defined in the Financial Administration Act, R.S. , 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police and includes:

- a) an individual;
- b) an individual who has incorporated;
- c) a partnership made up of former public servants; or
- d) a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity. "Lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the Public Service.

"Pension" means a pension payable pursuant to the Public Service Superannuation Act, R.S., 1985, c. P-36 as indexed pursuant to the Supplementary Retirement Benefits Act, R.S., 1985, c. S-24.

### Former Public Servant in Receipt of a Pension

Is the Bidder a FPS in receipt of a pension as defined above? **YES ( ) NO ( )**

If so, the Bidder must provide the following information:

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

### Work Force Reduction Program

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of a work force reduction program? **YES ( ) NO ( )**

If so, the Bidder must provide the following information:

- a) name of former public servant,;
- b) conditions of the lump sum payment incentive,;
- c) date of termination of employment,;
- d) amount of lump sum payment,;
- e) rate of pay on which lump sum payment is based,;
- f) period of lump sum payment including start date, end date and number of weeks,; and
- g) number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.



For all contracts awarded during the lump sum payment period, the total amount of fee that may be paid to a FPS who received a lump sum payment is \$5,000, including Goods and Services Tax or Harmonized Sales Tax.

**1.2 Status and Availability of Resources**

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

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

**1.3 Education and Experience**

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

\_\_\_\_\_  
**Name of Supplier's Authorized Signatory**

\_\_\_\_\_  
**Signature of Supplier's Authorized Signatory**

\_\_\_\_\_  
**Date**



### ATTACHMENT 2 TO PART 5

#### INTEGRITY CHECK

<b>Adresse de courriel /E-mail Address:</b> Cliquez ici pour entrer du texte. / Click here to enter text.
<b>Ministère/Department:</b> Shared Services Canada
<b>Dénomination sociale complète du fournisseur / Complete Legal Name of Supplier</b> Cliquez ici pour entrer du texte. / Click here to enter text.
<b>Adresse du fournisseur / Supplier Address</b> Cliquez ici pour entrer du texte. / Click here to enter text.
<b>NEA du fournisseur / Supplier PBN</b> Cliquez ici pour entrer du texte. / Click here to enter text.
<b>Numéro de la demande de soumissions (ou numéro du contrat proposé) Solicitation Number (or proposed Contract Number)</b> Cliquez ici pour entrer du texte. / Click here to enter text.
<b>Membres du conseil d'administration (Utilisez le format - Prénom Nom) Board of Directors (Use format - first name last name)</b>
Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.
Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.
Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.
Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.
Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.
Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.
Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.
Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.
Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.
Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.
<b>Autres Membres/ Additional Directors:</b> Cliquez ici pour entrer du texte. / Click here to enter text.



## **PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS**

### **6.1 Security Requirements**

There are no security requirements associated with this bid.



## **PART 7 - RESULTING CONTRACT CLAUSES**

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

### **7.1 Statement of Work**

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

#### **7.1.1 Optional Goods and/or Services**

The Contractor grants to Canada the irrevocable option to acquire the goods, services or both described at Annex 'A' of the Contract under the same conditions and at the prices and/or rates stated in the Contract. The option may only be exercised by the Contracting Authority and will be evidenced, for administrative purposes only, through a contract amendment.

The Contracting Authority may exercise the option at any time before the expiry of the Contract by sending a written notice to the Contractor.

#### **7.1.2 Task Authorization**

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

##### **7.1.2.1 Task Authorization Process**

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

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

##### **7.1.2.2 Task Authorization Limit**

The Technical Authority may authorize individual task authorizations up to a limit of \$0.00, Applicable Taxes included, inclusive of any revisions.

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



### 7.1.2.3 Minimum Work Guarantee - All the Work - Task Authorizations

1. In this clause,

"Maximum Contract Value" means the amount specified in the "Limitation of Expenditure" clause set out in the Contract; and

"Minimum Contract Value" means 3%.

2. Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with paragraph 3. In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.
3. In the event that Canada does not request work in the amount of the Minimum Contract Value during the period of the Contract, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.
4. Canada will have no obligation to the Contractor under this clause if Canada terminates the Contract in whole or in part for default.

### 7.1.2.4 Periodic Usage Reports - Contracts with Task Authorizations

The Contractor must compile and maintain records on its provision of services to the federal government under authorized Task Authorizations issued under the Contract.

The Contractor must provide this data in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "nil" report.

The data must be submitted on a quarterly basis to the Contracting Authority.

The quarterly periods are defined as follows:

1st quarter: April 1 to June 30;

2nd quarter: July 1 to September 30;

3rd quarter: October 1 to December 31; and

4th quarter: January 1 to March 31.

The data must be submitted to the Contracting Authority no later than 15 days calendar days after the end of the reporting period.

#### Reporting Requirement- Details

A detailed and current record of all authorized tasks must be kept for each contract with a task authorization process. This record must contain:

For each authorized task:

- i. the authorized task number or task revision number(s);
- ii. a title or a brief description of each authorized task;



- iii. the total estimated cost specified in the authorized Task Authorization (TA) of each task, exclusive of Applicable Taxes;
- iv. the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
- v. the start and completion date for each authorized task; and
- vi. the active status of each authorized task, as applicable.

For all authorized tasks:

- i. the amount (exclusive of Applicable Taxes) specified in the contract (as last amended, as applicable) as Canada's total liability to the contractor for all authorized TAs; and
- ii. the total amount, exclusive of Applicable Taxes, expended to date against all authorized TAs.

## **7.2 Standard Clauses and Conditions**

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

### **7.2.1 General Conditions**

2035 (2016-04-04) General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

### **7.2.2 Supplemental General Conditions**

4010 (2012-07-16) Services - Higher Complexity, apply to and form part of the Contract.

## **7.3 Security Requirements**

There is no security requirement applicable to the Contract.

## **7.4 Term of Contract**

### **7.4.1 Period of the Contract**

**The period of the Contract is from date of Contract to March 31, 2018, inclusive.**

### **7.4.2 Option to Extend the Contract**

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

Canada may exercise this option at any time by sending a written notice to the Contractor at least 1 calendar day before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.





## 7.5 Authorities

### 7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name:	<u>Megan Lamont</u>
Title:	<u>Team Leader</u>
Organization:	<u>Shared Services Canada</u>
Address:	<u>180 Kent Street, Ottawa, Ontario, K1G 4A8</u>
Telephone:	<u>(613) 219-7204</u>
Facsimile:	<u>(613) 960-6007</u>
E-mail Address:	<u>Megan.Lamont@ssc-spc.gc.ca</u>

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

### 7.5.2 Technical Authority

The Technical Authority for the Contract is:

Name:	_____
Title:	_____
Organization:	_____
Address:	_____
Telephone:	_____
Facsimile:	_____
E-mail Address:	_____

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

### 7.5.3 Contractor's Representative

Name:	_____
Title:	_____
Organization:	_____
Address:	_____
Telephone:	_____
Facsimile:	_____
E-mail Address:	_____



## 7.6 Proactive Disclosure of Contracts with Former Public Servants

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

## 7.7 Payment

### 7.7.1 Basis of Payment

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

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

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

### 7.7.2 Limitation of Expenditure - Cumulative Total of all Task Authorizations

1. Canada's total liability to the Contractor under the Contract for all authorized Task Authorizations (TAs), inclusive of any revisions, must not exceed the sum of \$ \_\_\_\_\_. Customs duties are excluded and Applicable Taxes are extra.
2. No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
3. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
  - a. when it is 75 percent committed, or
  - b. four (4) months before the contract expiry date, or
  - c. as soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions, whichever comes first.
4. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority, a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

### 7.7.3 Multiple Payments

Canada will pay the Contractor upon completion and delivery of units in accordance with the payment provisions of the Contract if:

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



#### 7.7.4 Travel and Living Expenses

The Contractor will be reimbursed for the authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for overhead or profit, in accordance with the meal, private vehicle and incidental expense allowances specified in Appendices B, C and D of the Treasury Board Travel Directive, and with the other provisions of the directive referring to "travellers", rather than those referring to "employees".

All travel must have the prior authorization of the Technical and Contracting Authority. All payments are subject to government audit.

Estimated Cost: \$ \_\_\_\_\_

#### 7.7.5 Discretionary Audit

The Contractor's certification that the price or rate is not in excess of the lowest price or rate charged anyone else, including the Contractor's most favoured customer, for the like quality and quantity of the goods, services or both, is subject to verification by government audit, at the discretion of Canada, before or after payment is made to the Contractor.

If the audit demonstrates that the certification is in error after payment is made to the Contractor, the Contractor must, at the discretion of Canada, make repayment to Canada in the amount found to be in excess of the lowest price or rate or authorize the retention by Canada of that amount by way of deduction from any sum of money that may be due or payable to the Contractor pursuant to the Contract.

If the audit demonstrates that the certification is in error before payment is made, the Contractor agrees that any pending invoice will be adjusted by Canada in accordance with the results of the audit. It is further agreed that if the Contract is still in effect at the time of the verification, the price or rate will be lowered in accordance with the results of the audit.

#### 7.8 Invoicing Instructions

1. An invoice for monthly payment cannot be submitted until all Work identified on the invoice is completed.
2. Each invoice must be supported by:
  - (a) a copy of time sheets to support the time claimed;
  - (b) a copy of the release document and any other documents as specified in the Contract;
  - (c) a copy of the invoices, receipts, vouchers for all direct expenses, travel and living expenses; and
  - (d) a copy of the monthly progress report.
3. Invoices must be distributed as follows:
  - (a) The original and one (1) copy must be forwarded to the following address for certification and payment: as appearing on the front page of the contract; and,
  - (b) One (1) copy must be forwarded to the Contracting Authority identified under article 5 of the Contract entitled "Authorities".



## **7.9 Certifications and Additional Information**

### **7.9.1 Compliance**

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

### **7.10 Applicable Laws**

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

### **7.11 Priority of Documents**

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

- (a) the Articles of Agreement;
- (b) the supplemental general conditions, 4010 (2012-07-16) Services - Higher Complexity;
- (c) the general conditions, 2035 (2016-04-04) General Conditions - Higher Complexity – Services;
- (d) Annex 'A', Statement of Work;
- (e) Annex 'B', Basis of Payment;
- (f) the signed Task Authorizations (including all of its annexes, if any);
- (g) the Contractor's bid dated \_\_\_\_\_,

### **7.12 Foreign Nationals (Canadian Contractor OR Foreign Contractor)**

*SACC Manual* clause A2000C (2006-06-16) Foreign Nationals (Canadian Contractor)

*SACC Manual* clause A2001C (2006-06-15) Foreign Nationals (Foreign Contractor)

### **7.13 Insurance**

*SACC Manual* clause G1005C (2016-01-28) Insurance



## ANNEX "A"

### STATEMENT OF WORK

**PROJECT TITLE:** Delivery of ITIL/ITSM Training

#### 1. DEPARTMENT'S REQUIREMENT:

Shared Services Canada is focused on service delivery to Canadians. The citizen-facing services it provides are being aligned to the Governments of Canada Strategic Reference Model (GSRM) while its internal services are being aligned to the Treasury Board of Canada Secretariat (TBS) Profile of Internal Services. These business services are further underpinned and supported by IT services. The Information Technology Infrastructure Library (ITIL) is quickly defining best practices and provides a framework for managing IT services and is recognized by TBS as the preferred service management framework for the Government of Canada.

The Shared Services Canada (SSC) Transformation Initiative, Service Management Improvement, centers on improving the branch's service management activities. ITIL is the reference framework being utilized for this endeavour, in alignment with TBS. ITIL is the de facto international standard framework for best practices in IT Service Management. ITIL contains a comprehensive description of the processes involved in managing IT services.

#### 2. SCOPE OF WORK:

The Contractor will deliver a series of instructor led in-class or virtual training courses on subject listed in request for proposal (RFP). The Contractor shall provide the facilities for the training.

**2.1 Course Delivery:** Each course will have a minimum of 6 students and a maximum of 15 students. Courses will be delivered in English or French as indicated on the course calendar. The courses may occur in any of the sites indicated in the Anticipated Location of Training or virtually (Section 5).

It is anticipated that the majority of courses will be held in the National Capital Region (75%) with the remainder (25%) held in regional locations. Courses are to be offered during business hours (8:30am to 4:30pm) in the time zone specific to the location where the course is being delivered, for a total of 7.5 hours per day. Training may also be required using a virtual classroom for remote employees- Distance Interactive Learning is emerging as the new method of training. Tele-seminars, interactive classrooms or webinars should also be presented as an option, but should not be the only option available.

#### 2.2 Course Scheduling:

The Project Authority will establish a calendar for the delivery of the training. The Contractor must be capable of scheduling at least 2 courses in different locations at the same time. The calendar will specify the language in which the course is to be delivered and the location of the course. The pre-established calendar will be shared with the Contractor and the Contractor's requirements will be accommodated to the fullest extent possible at the discretion of the Project Authority. The Contractor and the Project Authority will continue to regularly review and update the calendar.

**2.3 Auditing of courses:** The Project Authority or their delegate reserves the right to audit any courses held.

**2.4 Notification of Course Participants:** The Project Authority will provide a list of learners for each course to the Contractor 15 business days prior to the commencement of the course. As well, the Contractor will supply the Project Authority with a list of all learners, by course (for each day).



**2.5 Course Certificates:** The Contractor will provide all learners with a certificate of course completion.

**2.6 Course evaluations:** The Project Authority will be solely responsible for course evaluations and will provide the Contractor with a summary of the evaluation for each course being delivered.

**2.7 Course cancellations:** Project Authority will notify the Contractor a minimum of 10-business day prior to commencement of the course should a course cancellation be required.

**2.8 Course documentation:** All documentation must be provided in English or French to learners, based on the specified delivery language of a given course.

The Contractor will submit one copy of the complete course packages for each course requested, but may submit the second package in the other official language, from that provided with the bid, to the Project Authority for review and acceptance within 30 days of contract award. The English and French versions must match in both content and format.

**2.9 Accommodation for special needs students:** The Project Authority will notify the contractor at least two weeks in advance of a course if a person with a disability requiring accommodations will participate in the course. Following this notification, the Project Authority and the Contractor will work together to develop options to permit the individual to effectively participate in the training. The Project Authority, in full consultation with the Contractor, will determine the best course of action to be taken. The Project Authority will assume any financial responsibility for the implementation of that decision. The Contractor will contribute the best efforts and resources of their organization to implement the decision.

### **3. ANTICIPATED LOCATIONS OF TRAINING:**

- National Capital Region, of Canada: Ottawa, ON; Gatineau, QC;
- Ontario: Belleville, Toronto
- Quebec: Montreal, Quebec City
- Manitoba: Winnipeg
- Saskatchewan: Regina
- Western Region: Vancouver BC, Edmonton AB,
- Atlantic Region: St; John's NFLD, Moncton NB, Halifax NS

### **4. MINIMUM REQUIREMENTS FOR CONTRACTOR SUPPLIED TRAINING ROOMS AND CLASS MATERIALS**

**4.1 Contractor supplied training rooms:** The Contractor shall supply training room(s) equipped with white boards and projectors, comfortable chairs, tables to support learner requirements establishing an environment conducive to the effective delivery of learning. Each room must be a minimum of 250 square feet, have appropriate climate control, adequate lighting, and exterior sound proofing and have accessible washrooms conveniently located.

**4.2 Contractor supplied course materials:** The Contractor shall provide all instructions, materials, training aids, and text books, name cards, pens, writing paper, and flip charts as required.



## 5. COURSE INSTRUCTORS:

- 5.1 The Project Authority reserves the right to ask the Contractor to stop using an “approved” instructor and request a substitute.

## 6. TRAVEL:

The Project Authority will pay all authorized travel and living expenses incurred by the contractor for the delivery of courses outside of the National Capital Region, in accordance with the Treasury Board Travel Directive.

## 7. COURSE CONTENT:

The Contractor will provide a single individual as the point of contact.

The contractor will provide the following list of courses and workshops; each course or workshop will be concluded with the official accredited examination:

### ITIL Foundations

#### Topics:

- Key principles and concepts of IT service management
- Benefits of implementing ITIL in an organization
- How service management processes map to the overall service lifecycle
- Basic concepts and definitions related to the service lifecycle
- Activities and roles involved with the service lifecycle
- Relationships of each component of the service lifecycle and how each maps to other components
- Factors that make service management more or less effective
- ITIL V3 Foundation Course
  - Topics:
- The following Modules are included in this course:
- Module 1 – Introduction
- Module 2 – Service Lifecycle
- Module 3 – Service Management as a practice
- Module 4 – Key Principles, Models and Key Ideas
- Module 5 – Lifecycle Phases
- Module 6 – Service Capabilities
- Module 7 – Service Management

### ITIL Lifecycles – Service Operations

- Review of Service Operation processes including:
  - Access Management
  - Event Management
  - Incident Management
  - Problem Management
  - Request Fulfillment
- Review of Service Operation activities, including:
  - Database Management
  - Desktop Support
  - Internet/Web Management
  - Facilities and Datacenter Management
  - Monitoring and Control
  - Mainframe Management



- Network Management
  - Server Management and Support
- How does Service Operation processes interact with other Service Lifecycle processes
- Service Operation functions to roles, responsibilities and activities - mapping
- Considerations when implementing technology with Service Operations

#### ITIL Lifecycles – Service Transition

- Review of Service Transition including:
  - Change Evaluation
  - Change Management
  - Knowledge Management
  - Release and Deployment Management
  - Service Asset and Configuration Management
  - Service Validation and Testing
  - Transition Planning and Support
- How is the Service Transition compatible with other Service Lifecycle processes
- Managing commitment and communication
- Managing changes for the organization and stakeholder
- Considerations when implementing technology with Service Transition

#### ITIL Lifecycles – Service Design

- Review of Service Design including:
  - Availability Management
  - Capacity Management
  - Design Coordination
  - Information Security Management
  - IT Service Continuity Management
  - Service Catalog Management
  - Service Level Management
  - Supplier Management
- How is Service Design compatible with other Service Lifecycle processes
- Considerations when implementing technology with Service Design
- Business value with service design
- The principles of balanced service design:
  - Functionality
  - Resources
  - Schedule
- How to identify meaningful service requirements
- The relationship between:
  - Service
  - Application
  - Infrastructure
  - data architectures
- The key roles and organizational capabilities
- The relationship between:
  - Design constraints
  - Service utility
  - Warranty
- Strategic sourcing and delivery models (insourcing, outsourcing, co-sourcing, etc.) - advantages and disadvantages

#### ITIL Lifecycles - Continual Service Improvement





- Review of Continual Service Improvement Approach
- Key activities of the Seven-Step Improvement Process
- How to identify critical success factors:
  - Risks
  - Challenges
- Measuring and reporting frameworks:
  - Balanced Scorecard
  - SWOT analysis
- Knowledge Management
- Service Level Management
- Creating Return on Investment
- Key measurements and service reporting
- Roles and responsibilities to support the improvement process
- Considerations when implementing technology with Continual Service Improvement

#### ITIL Lifecycles - Service Strategy

- Review of Service Strategy
  - Business Relationship Management
  - Demand Management
  - Financial Management
  - Strategy Management for IT Services
  - Service Portfolio Management
- Dynamics and forces impacting IT management
- Defining services and how services can deliver value to the customer market spaces
- The impact of external markets, customer requirements and continual service improvement on the Service Strategy
- Organization structures and provider types supporting an IT Value Network
- Defining and managing the relationship between business and IT services and the demand for those services
- Defining customer value creation
- Defining and managing IT financial measures for success
- The strategic benefits of service based costing and recovery
- Conducting strategic assessments and dealing with market uncertainty
- A practical approach to creating a Service Management strategy
- Driving strategy through the Service Lifecycle
- How to measure Service Strategy and create return on investment



**ANNEX “B”**

**BASIS OF PAYMENT**

All Courses will be minimum 6, maximum 15 participants.

<b>National Capital Region</b>	
<b>Course</b>	<b>Cost</b>
ITIL Foundations	
ITIL Lifecycles – Service Operations	
ITIL Lifecycles – Service Transition	
ITIL Lifecycles – Service Design	
ITIL Lifecycles - Continual Service Improvement	
ITIL Lifecycles - Service Strategy	

<b>Ontario (Belleville, Toronto)</b>	
<b>Course</b>	<b>Cost</b>
ITIL Foundations	

<b>Quebec (Montreal, Quebec City)</b>	
<b>Course</b>	<b>Cost</b>
ITIL Foundations	

<b>Manitoba (Winnipeg)</b>	
<b>Course</b>	<b>Cost</b>
ITIL Foundations	



<b>Saskatchewan (Regina)</b>	
<b>Course</b>	<b>Cost</b>
ITIL Foundations	

<b>Western Region (Vancouver, BC, Edmonton, AB)</b>	
<b>Course</b>	<b>Cost</b>
ITIL Foundations	

<b>Atlantic Region (Halifax, NS, Moncton, NB, St. John's, NF)</b>	
<b>Course</b>	<b>Cost</b>
ITIL Foundations	



**ANNEX "C"**

**INTEGRITY CHECK**

<b>Adresse de courriel /E-mail Address:</b> Cliquez ici pour entrer du texte. / Click here to enter text.
<b>Ministère/Department:</b> Shared Services Canada
<b>Dénomination sociale complète du fournisseur / Complete Legal Name of Supplier</b> Cliquez ici pour entrer du texte. / Click here to enter text.
<b>Adresse du fournisseur / Supplier Address</b> Cliquez ici pour entrer du texte. / Click here to enter text.
<b>NEA du fournisseur / Supplier PBN</b> Cliquez ici pour entrer du texte. / Click here to enter text.
<b>Numéro de la demande de soumissions (ou numéro du contrat proposé)</b> <b>Solicitation Number (or proposed Contract Number)</b> Cliquez ici pour entrer du texte. / Click here to enter text.
<b>Membres du conseil d'administration (Utilisez le format - Prénom Nom)</b> <b>Board of Directors (Use format - first name last name)</b>
<b>Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.</b>
<b>Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.</b>
<b>Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.</b>
<b>Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.</b>
<b>Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.</b>
<b>Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.</b>
<b>Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.</b>
<b>Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.</b>
<b>Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.</b>
<b>Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.</b>
<b>Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.</b>
<b>Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.</b>
<b>Autres Membres/ Additional Directors:</b> Cliquez ici pour entrer du texte. / Click here to enter text.



**ANNEX "D"**

**TASK AUTHORIZATION FORM**

<b>TASK AUTHORIZATION</b>			
<b>Contractor:</b>		<b>Contract Number:</b>	
<b>Task Number:</b>		<b>Date:</b>	
<b>Amendment Number:</b>			
<b>TA Request (For completion by Technical Authority)</b>			
<b>1. Description of Work to be Performed</b>			
<b>Statement of Work</b>			
<b>Description of any Deliverable(s) required (including the required format and media)</b>			
Any reporting obligations and deadlines for submitting the reports as they will apply to the resulting Contract will be described here.			
<b>2. PERIOD OF SERVICES</b>	<b>From:</b>	_____	<b>To:</b> _____
<b>3. Work Location</b>			
<b>4. Other Conditions /Restrains</b>	[ ] Yes [ ] No <b>Specify:</b>		
<b>5. Travel</b>	[ ] Yes [ ] No <b>Specify:</b>		
<b>6. METHOD OF PAYMENT:</b>			
<input type="checkbox"/> Multiple			
<b>7. BILINGUALISM (if applicable)</b>			
[ ] English and French [ ] French [ ] English			
If both, the categories of personnel requiring bilingualism include:			
<b>TA Proposal [For completion by Contractor]</b>			
<b>8. Estimated Cost Contract</b>			
<b>Name of Proposed Resource</b>	<b>Course Title / # Students</b>	<b>Date of Course(s)</b>	<b>Cost</b>
<b>Sub-total Professional Fees:</b>			



		<b>HST:</b>	
		<b>Total:</b>	
<b>TA Approval</b>			
<b>11. Signing Authorities</b>			
	Signatures of Authorized Representatives		Date
Name & Title of Individual Authorized to Sign on Behalf of Contractor:			
Name & Title of Individual Authorized to Sign on Behalf of Technical Authority:			
Name & Title of Contracting Authority:			
<b>12. Invoicing</b>			
<p>Payment to be made based on receipt of detailed invoices for services rendered, subject to full acceptance by the Project Authority. Total of payments not to exceed the grand total.</p> <p>Original invoices shall be sent to the Project Authority. One copy of each invoice, together with attachments, shall be sent to the Contracting Authority or its designated authority.</p> <p>Email submission of invoices and supporting documents is preferable.</p>			