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RETOURNER LES SOUMISSIONS À:**

**Bid Receiving - PWGSC / Réception des  
soumissions - TPSGC**

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**Place du Portage, Phase III**

**Core 0B2 / Noyau 0B2**

**Gatineau**

**Québec**

**K1A 0S5**

**Bid Fax: (819) 997-9776**

**REQUEST FOR PROPOSAL  
DEMANDE DE PROPOSITION**

**Proposal To: Public Works and Government  
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 therefor.

**Proposition aux: Travaux Publics et Services  
Gouvernementaux Canada**

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

**Comments - Commentaires**

<b>Title - Sujet</b> Intercultural Learning Services	
<b>Solicitation No. - N° de l'invitation</b> 08349-160412/A	<b>Date</b> 2017-01-17
<b>Client Reference No. - N° de référence du client</b> 08349-160412	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$ZF-524-31017	
<b>File No. - N° de dossier</b> 524zf.08349-160412	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2017-02-28</b>	<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 type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Leblanc, Marc-André	<b>Buyer Id - Id de l'acheteur</b> 524zf
<b>Telephone No. - N° de téléphone</b> (873) 469-3914 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> Foreign Affairs, Trade and Development Canada 115 Bisson Street GATINEAU QUEBEC Canada	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

**Vendor/Firm Name and Address**

**Raison sociale et adresse du  
fournisseur/de l'entrepreneur**

**Issuing Office - Bureau de distribution**

Linguistic Services Division / Division des services  
linguistiques

PSBID, PWGSC / DIASP,TPSGC

11 Laurier St. / 11, rue Laurier

10C1/Place du Portage, Phase III

Gatineau

Québec

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<b>Delivery Required - Livraison exigée</b> See Herein	<b>Delivery Offered - Livraison proposée</b>
<b>Vendor/Firm Name and Address</b> <b>Raison sociale et adresse du fournisseur/de l'entrepreneur</b>	
<b>Telephone No. - N° de téléphone</b> <b>Facsimile No. - N° de télécopieur</b>	
<b>Name and title of person authorized to sign on behalf of Vendor/Firm</b> <b>(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>

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## INTERCULTURAL LEARNING AND RELATED SERVICES

Bid solicitation # 08349-160412/A for the provision of the following professional services: Intercultural Effectiveness Training and Related Services.

### 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 Attachments include Pricing Schedule, Technical Criteria, and Additional Certifications Precedent to Contract Award.

The Annexes include the Statement of Work, Basis of Payment, Security Requirements Check List, Task Authorization Form, 48-Hour Report Form, Course Evaluation Form, and Sample MS Office Excel Spreadsheet for Period Usage Reports – Contracts with TAs.

#### 1.2 Summary

1.2.1 The Centre for Intercultural Learning (CFSC) of Global Affairs Canada (GAC) intends to procure the services of one (1) supplier capable of providing to CFSC "as and when requested" support for its intercultural learning programs by providing the following services:

- Learning Event Coordination and Administration;
- Learning Event Delivery and Facilitation;
- Provision of Country Resource Personnel and Subject Matter Experts supporting Learning Events;
- Learning Event Design and Development;
- Learning Product Design and Development: E-learning, video and media development, database development, print and electronic documents; and
- Research and Strategic Advisory Services related to Learning.

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The required services are described in more detail in Annex A - Statement of Work.

1.2.2 The bid solicitation is intended to result in the award of one contract covering an initial period of three (3) years, with the irrevocable option to extend the period of the contract by up to two (2) additional one (1) year periods under the same conditions.

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

1.2.4 The requirement is subject to the provisions of the North American Free Trade Agreement (NAFTA) and the Agreement on Internal Trade (AIT).

1.2.5 The resulting Contract 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 processed individually.

1.2.6 The Federal Contractors Program (FCP) for employment equity applies to this procurement; see Part 5 – Certifications and Additional Information, Part 7 - Resulting Contract Clauses and the attachment 1 to Part 5 titled Federal Contractors Program for Employment Equity - Certification.

### **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.

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## 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) (<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 (2016-04-05), 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: 180 calendar days.

### 2.2 Submission of Bids

Bids 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 bid solicitation. Bids transmitted to PWGSC by electronic mail will not be accepted."

Due to the nature of the bid solicitation, bids transmitted by facsimile to PWGSC 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 FPS, bidders must provide in writing before contract award for each question below, the answer and, as applicable, the information required.

If the Contracting Authority has not received the answer to the question and, as applicable, the information required by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the answer and, as applicable, the information required. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

### Definitions

For the purposes of this clause,

"former public servant" is any former member of a department as defined in the [Financial Administration Act](#), R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the

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Royal Canadian Mounted Police. A former public servant may be:

- (a) an individual;
- (b) an individual who has incorporated;
- (c) a partnership made of former public servants; or
- (d) a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"pension" means a pension or annual allowance paid under the [Public Service Superannuation Act \(PSSA\)](#), R.S., 1985, c. P-36, and any increases paid pursuant to the [Supplementary Retirement Benefits Act](#), R.S., 1985, c. S-24 as it affects the PSSA. It does not include pensions payable pursuant to the [Canadian Forces Superannuation Act](#), R.S., 1985, c. C-17, the [Defence Services Pension Continuation Act](#), 1970, c. D-3, the [Royal Canadian Mounted Police Pension Continuation Act](#), 1970, c. R-10, and the [Royal Canadian Mounted Police Superannuation Act](#), R.S., 1985, c. R-11, [the Members of Parliament Retiring Allowances Act](#), R.S., 1985, c. M-5, and that portion of pension payable to the [Canada Pension Plan Act](#), R.S., 1985, c. C-8.

#### **Former Public Servant in Receipt of a Pension**

As per the above definitions, is the Bidder a FPS in receipt of a pension?

Yes ( ) No ( )

If so, the Bidder must provide the following information for all FPS in receipt of a pension, as applicable:

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

By providing this information, bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with [Contracting Policy Notice: 2012-2](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

#### **Work Force Adjustment Directive**

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive?

Yes ( ) No ( )

If so, the Bidder must provide the following information:

- a) name of former public servant;
- b) conditions of the lump sum payment incentive;
- c) date of termination of employment;
- d) amount of lump sum payment;
- e) rate of pay on which lump sum payment is based;

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- 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 fees that may be paid to a FPS who received a lump sum payment is \$5,000, including Applicable Taxes.

## **2.4 Inquiries - Bid Solicitation**

All enquiries must be submitted in writing to the Contracting Authority no later than 15 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 Basis for Canada's Ownership of Intellectual Property**

Global Affairs Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, for the following reasons, as set out in the [Policy on Title to Intellectual Property Arising Under Crown Procurement Contracts](#) the Intellectual Property in Foreground Information consists of material subject to copyright, with the exception of computer software and all documentation pertaining to that software.

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## 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 [4 hard copies and 2 soft copies on CD or USB key];  
Section II: Financial Bid [1 hard copy]  
Section III: Certifications [1 hard copy]; and  
Section IV: Additional Information [1 hard copy].

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; and
- (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](#).

To assist Canada in reaching its objectives, bidders should:

1. use paper containing fiber 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 color printing, printing double sided/duplex, using staples or clips instead of cerlox, duo tangs 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 describe their approach in a thorough, concise and clear manner for carrying out the work.

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

Part 4, Evaluation Procedures, contains additional instructions that bidders should consider when preparing their technical bid.

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## Section II: Financial Bid

- A. 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.
- B. Bidders must submit their rates FOB destination; Canadian customs duties and excise taxes included, as applicable; and Applicable Taxes excluded.
- C. When preparing their financial bid, Bidders should review clause 4.1.2, Financial Evaluation, of Part 4 of the bid solicitation; and article 7.6, Payment, of Part 7 of the bid solicitation.

### D. SACC Manual Clauses

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

### E. Electronic Payment of Invoices - Bid

Canada requests that bidders:

1. select option 1 or, as applicable, option 2 below; and
2. include the selected option in Section II of their bid, after having completed it.

The Bidder is not obligated to accept payment by Electronic Payment Instruments. Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

#### Option 1:

Electronic Payment Instruments will be accepted for payment of invoices. The following Electronic Payment Instrument(s) are accepted:

- Direct Deposit (Domestic and International)
- Electronic Data Interchange (EDI)
- Wire Transfer (International Only)
- Large Value Transfer System (LVTS) (Over \$25M)

#### Option 2:

- Electronic Payment Instruments will not be accepted for payment of invoices.

## Section III: Certifications

In Section III of their bid, bidders should provide the certifications required under Part 5 and, as applicable, any associated additional information.

## Section IV: Additional Information

In Section IV of their bid, bidders should provide:

1. their legal name;
2. their Procurement Business Number (PBN);
3. the name of the contact person (provide also this person's mailing address, phone and facsimile numbers and email address) authorized by the Bidder to enter into communications with Canada with regards to their bid, and any contract that may result from their bid;
4. for Part 2, article 2.3, Former Public Servant, of the bid solicitation: the required answer to each question; and, if the answer is yes, the required information;

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5. for Part 6, article 6.1, Security Requirement, of the bid solicitation:
- a) for each individual who will require access to classified or protected information, assets or sensitive work sites:
    - 1) the name of the individual;
    - 2) the date of birth of the individual; and
    - 3) if available, information confirming the individual meets the security requirement as indicated in Part 7 - Resulting Contract Clauses;

## ATTACHMENT 1 TO PART 3, PRICING SCHEDULE

The Bidder must complete the attached pricing schedule using the MS Excel worksheet and include it in its financial bid. To obtain a copy of the Pricing Schedule in MS Excel format a request must be submitted via email to the Contracting Authority at the following email address: [Marc-Andre.Lebianc@tpsgc-pwgsc.gc.ca](mailto:Marc-Andre.Lebianc@tpsgc-pwgsc.gc.ca)

As a minimum, the Bidder must respond to this pricing schedule by including in its financial bid for each of the periods and for each of the service categories identified below its quoted firm all-inclusive rates (\$CAD).

The volumetric data included in this pricing schedule are provided for bid evaluated price determination purposes only. They are not to be considered as a contractual guarantee. Their inclusion in this pricing schedule 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.

When submitted by the Bidder to meet the conditions of any resulting contract, the rates and prices listed below include the total estimate for all travel and living expenses that may need to be incurred for the following purposes:

- a. work described in Part 7, Resulting Contract Clauses, of the bid solicitation required to be performed within the National Capital Region (NCR), the Greater Toronto Area, the Greater Montreal Area or Kingston, ON. 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/eng/acts/N-4/> and a definition of the Greater Toronto Area and the Greater Montreal Area is provided in section 12.0 of Annex A and on the following website: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/dznrmm-dnzrma-eng.html>;
- b. travel between the successful Bidder's place of business and the NCR, the Greater Toronto Area, the Greater Montreal Area and Kingston (ON); and
- c. the relocation of resources.

These expenses cannot be listed directly or separately from the professional fees in any contract resulting from the bid solicitation.

### 1. Learning Event Coordination and Administration

The Bidder must quote firm all-inclusive per diem rates (\$CAD) for the provision of learning event coordination and administration services, as described in Section 3.1 of the Statement of Work. Learning event coordination and administration includes: liaising with CFSC personnel; scheduling events; reserving facilities; registering participants; making travel and accommodation arrangements for facilitators, CRPs and/or SMEs in accordance with Treasury Board Travel Directive (see section 10.2 of Annex "A-1" - Statement of Work) and any CFSC directives; sourcing and scheduling facilitators, country resource personnel and subject matter experts; preparing learning materials; arranging catering and hospitality; ensuring the setting up, testing, and dismantling audio visual equipment; providing post-event evaluation reports; and tracking and reimbursement of expenses incurred by event participants, facilitators, country resource personnel and subject matter experts.

For the purposes of evaluation, the Bidder must estimate the total cost for the provision of event coordination and administration services based

on the all-inclusive per diem rates multiplied by the estimated volume of work listed in Table A1 below:

**Table A1**

Category	Initial Contract Period		Option Year 1		Option Year 2	
	A <sub>1</sub>	B <sub>1</sub>	D <sub>1</sub>	E <sub>1</sub>	F <sub>1</sub>	G <sub>1</sub>
Estimated Average Level of Effort per Year (Days)						
Coordination and Administration	800					
Document Production Specialists	80					
<b>Sub-Total (Table A1):</b>						
		Per diem rate (\$)	Per diem rate (\$)	Sub-Total A <sub>1</sub> x D <sub>1</sub>	Per diem rate (\$)	Sub-Total A <sub>1</sub> x F <sub>1</sub>
		Sub-Total 3A <sub>1</sub> x B <sub>1</sub>				Sub-Total C <sub>1</sub> + E <sub>1</sub> + G <sub>1</sub>

A work day is defined as 8 hours of work, exclusive of meal breaks. Payment shall be made for days actually worked, with no provision for annual leave, statutory holidays and sick leave. If time worked is more or less than a day, the daily rate shall be prorated to reflect the actual time worked.

**2.0 Learning Event Delivery and Facilitation**

*2.1 Learning Events Delivered in Canada*

The Bidder must quote firm all-inclusive **per diem** rates (\$CAD) for the provision of learning event delivery and facilitation services, as described in Section 3.2 of the Statement of Work. Learning event delivery and facilitation includes: liaising with CFSC personnel; reviewing the learning needs assessment, learning event objectives and content prior to delivery; liaising with country resource personnel and subject matter experts; delivery of the event in keeping with CFSC standards; providing post-event evaluation reports; and following up with the CFSC Project Authority or his/her delegated representative. For example, consider a 2-day course for which the facilitator spends an additional two (2) days preparing for delivery, one day travelling and one day reporting; the contractor would charge CFSC for two days at the all-inclusive per diem rate quoted, and not six days.

For the purposes of evaluation, the Bidder must estimate the total cost for the provision of learning event delivery and facilitation services based on the all-inclusive per diem rates multiplied by the estimated volume of work listed in Table A2.1 below:

**Table A2.1**

A <sub>2.1</sub>	B <sub>2.1</sub> Estimated Average Number of Events per Year	Initial Contract Period		Option Year 1		Option Year 2		D <sub>2.1</sub> + F <sub>2.1</sub> +H <sub>2.1</sub>
		C <sub>2.1</sub> Per Diem Rate (\$)	D <sub>2.1</sub> Sub-Total A <sub>2.1</sub> ×3B <sub>2.1</sub> ×C <sub>2.1</sub>	E <sub>2.1</sub> Per Diem Rate (\$)	F <sub>2.1</sub> Sub-Total A <sub>2.1</sub> × B <sub>2.1</sub> × E <sub>2.1</sub>	G <sub>2.1</sub> Per diem rate (\$)	H <sub>2.1</sub> Sub-Total A <sub>2.1</sub> × B <sub>2.1</sub> × G <sub>2.1</sub>	
NCR (travel costs included)	0.5 day							
	1 day	60						
	2 days	80						
	3 to > 3 days	60						
Greater Toronto Area, Greater Montreal Area and Kingston (travel costs included)	0.5 day	10						
	1 day	20						
	2 days	10						
	3 to > 3 days	5						
Other locations within Canada (travel costs excluded)	0.5 day	5						
	1 day	25						
	2 days	25						
	3 to > 3 days	10						

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<b>Sub-Total – Table A2.1:</b>
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For Learning Event Delivery and Facilitation, a work day is defined as the time required for the full extent of event delivery as described in section 3.2 of the Statement of Work. Payment shall be made for days actually worked, with no provision for annual leave, statutory holidays and sick leave.

CFSC will not pay separate travel and living costs for facilitators for standardized intercultural learning events within the NCR, the Greater Toronto Area, the Greater Montreal Area or Kingston (ON). Any associated costs must be included in the respective all-inclusive per diem rates.

CFSC will pay travel and living costs for facilitators for events other than the locations listed above. When so authorized, the Contractor will be reimbursed for 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 National Joint Council Travel Directive (see section 10.2 of Annex "A" - Statement of Work) and any CFSC directives. CFSC will reserve the right to select the most suitable and skilled resource to deliver the course objectives without additional cost to the Crown.

## 2.2 Specialized Learning Events and Process Facilitation Events Delivered within Canada and Internationally

The Bidder must quote per diem rates (\$CAD) for the provision of International and/or Specialized learning event delivery (i.e. customized courses with specialized subject matter expertise in international diplomacy, development and trade) and facilitation services, as described in Section 3.2 of the Statement of Work. International and/or Specialized learning event delivery and facilitation includes: liaising with CFSC personnel; reviewing and/or contributing to the learning needs assessment, learning event objectives and content prior to delivery; delivery of the event in keeping with CFSC standards; providing post-event evaluation reports; and following up with the CFSC Project Authority or his/her delegated representative. Please note that this is a per diem rate and not an all-inclusive delivery as described in 2.1.

For the purposes of evaluation, the Bidder must estimate the total cost for the provision of international and/or specialized learning event delivery and facilitation services based on the per diem rates and the estimated volume of work listed in Table A2.2 below:

**Table A2.2**

	Initial Contract Period		Option Year 1		Option Year 1		D <sub>2.2</sub> + F <sub>2.2</sub> +H <sub>2.2</sub>		
	A <sub>2.2</sub>	B <sub>2.2</sub>	C <sub>2.2</sub>	D <sub>2.2</sub>	E <sub>2.2</sub>	F <sub>2.2</sub>		G <sub>2.2</sub>	H <sub>2.2</sub>
Average Level of Effort per Event per Facilitator		Estimated Average Number of Events per Year	Per diem rate (\$)	Sub-Total $A_{2.2} \times 3B_{2.2} \times C_{2.2}$	Per diem rate (\$)	Sub-Total $A_{2.2} \times 3B_{2.2} \times E_{2.2}$	Per diem rate (\$)	Sub-Total $A_{2.2} \times B_{2.2} \times G_{2.2}$	Sub-Total
Specialized Events (locations in Canada and international) (travel costs excluded)	14 days	22							
<b>Sub-Total – Table A2.2:</b>									

For Specialized Learning Event Delivery and Facilitation, a work day is defined as the time required for the full extent of event delivery as described in section 3.2 of the Statement of Work. Payment shall be made for days actually worked, with no provision for annual leave, statutory holidays and sick leave.

CFSC will pay travel and living costs for facilitators for international events and for highly customized courses within Canada. When so authorized, the Contractor will be reimbursed for 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 National Joint Council Travel Directive (see section 10.2 of Annex "A" - Statement of Work) and any CFSC directives. CFSC will reserve the right to select the most suitable and skilled resource to deliver the course objectives.

**3.0 Provision of Country Resource Personnel and Subject Matter Experts to support Learning Events**

*3.1 Country Resource Personnel*

The Bidder must quote firm all-inclusive **per diem** rates (\$CAD) for the provision of country resource personnel to support learning events, as

described in Section 3.3 of the Statement of Work. Learning event delivery and facilitation is often augmented by country resource personnel.

For the purposes of evaluation, the Bidder must estimate the total cost for the provision of country resource personnel to support learning events based on the all-inclusive per diem rates and the estimated volume of work listed in Table A3.1 below:

**Table A3.1**

Resource Type	A <sub>3.1</sub> In-Classroom Duration	B <sub>3.1</sub> Estimated Average Number of CRPs per Year	Initial Contract Period		Option Year 1		Option Year 2		
			C <sub>3.1</sub>	D <sub>3.1</sub>	E <sub>3.1</sub>	F <sub>3.1</sub>	G <sub>3.1</sub>	H <sub>3.1</sub>	
Country Resource Personnel (GRP)	0.5 day	275	Per diem rate (\$)	Sub-Total A <sub>3.1</sub> x 3B <sub>3.1</sub> x C <sub>3.1</sub>	Per diem rate (\$)	Sub-Total A <sub>3.1</sub> x B <sub>3.1</sub> x E <sub>3.1</sub>	Per diem rate (\$)	Sub-Total A <sub>3.1</sub> x B <sub>3.1</sub> x G <sub>3.1</sub>	D <sub>3.1</sub> + F <sub>3.1</sub> + H <sub>3.1</sub>
	1 day	25							Sub-Total
<b>Sub-Total – Table A3.1:</b>									

A work day is defined as 8 hours of work, exclusive of meal breaks. Payment shall be made for days actually worked, with no provision for a annual leave, statutory holidays and sick leave. If time worked is more or less than a day, the daily rate shall be prorated to reflect the actual time worked.

**3.2 Subject Matter Experts**

The Bidder must quote firm all-inclusive percentage **mark-up** (%) that will be applied to the per diem rates of subject matter experts provided to support learning events, as described in Section 3.3 of the Statement of Work. Learning event delivery and facilitation is often augmented by subject matter experts with expertise in specific geographic regions and/or professional sectors such as international development, diplomacy, defence and international trade.

For the purposes of evaluation, the Bidder must estimate the total cost for the provision of subject matter experts to support learning events based on the all-inclusive percentage mark-up and the estimated volume of work listed in Table A3.2 below:

**Table A3.2**

Resource Type	Initial Contract Period		Option Year 1		Option Year 2				
	A <sub>3.2</sub>	B <sub>3.2</sub>	C <sub>3.2</sub>	D <sub>3.2</sub>	E <sub>3.2</sub>	F <sub>3.2</sub>	G <sub>3.2</sub>	H <sub>3.2</sub>	D <sub>3.2</sub> + F <sub>3.2</sub> + H <sub>3.2</sub>
Estimated Average Number of SME Days' LoE per Year		Estimated Average SME Per Diem Rate	Mark up (%)	Sub-Total 3A <sub>3.2</sub> x B <sub>3.2</sub> + C <sub>3.2</sub>	Mark up (%)	Sub-Total A <sub>3.2</sub> x B <sub>3.2</sub> + E <sub>3.2</sub>	Mark up (%)	Sub-Total A <sub>3.2</sub> x B <sub>3.2</sub> + G <sub>3.2</sub>	Sub-Total
Subject Matter Experts	180	\$950.00							
<b>Sub-Total – Table A3.2:</b>									

**4.0 Learning Event Design and Development**

The Bidder must quote firm all-inclusive per diem rates (\$CAD) for the provision of learning event design and development services, as described in Section 3.4 of the Statement of Work. Learning event design and development involves: liaising with CFSC personnel; conducting needs analyses; designing learning events based on the needs analysis and the advice and feedback of the CFSC Project Authority or his/her delegated representatives; developing learning events based on the preliminary design and the advice and feedback of the CFSC Project Authority or his/her delegated representatives; updating and/or adapting existing instructional design materials; and adhering to CFSC's instructional design methodology, quality standards, service evaluation and quality control requirements.

For the purposes of evaluation, the Bidder must estimate the total cost for the provision of learning event design and development services based on the all-inclusive per diem rates and the estimated volume of work listed in Table A4 below:

**Table A4**

Estimated Average Level of Effort per Year (days)	Initial Contract Period		Option Year 1		Option Year 2		
	B <sub>4</sub>	C <sub>4</sub>	D <sub>4</sub>	E <sub>4</sub>	F <sub>4</sub>	G <sub>4</sub>	C <sub>4</sub> + E <sub>4</sub> + G <sub>4</sub>
120	Per diem rate (\$)	Sub-Total 3A <sub>4</sub> x B <sub>4</sub>	Per diem rate (\$)	Sub-Total A <sub>4</sub> x D <sub>4</sub>	Per diem rate (\$)	Sub-Total A <sub>4</sub> x F <sub>4</sub>	Sub-Total
<b>Sub-Total – Table A4:</b>							

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A work day is defined as 8 hours of work, exclusive of meal breaks. Payment shall be made for days actually worked, with no provision for annual leave, statutory holidays and sick leave. If time worked is more or less than a day, the daily rate shall be prorated to reflect the actual time worked.

### 5.0 Learning Product Design and Development Services

The Bidder must quote firm all-inclusive **per diem** rates (\$CAD) by resource category for the provision of learning product design and development services, as described in Section 3.5 of the Statement of Work. Learning product design and development includes the design, development and maintenance of: e-learning and m-learning products; websites, micro-sites, electronic magazines and/or newsletters; videos; and print and electronic documents.

For the purposes of evaluation, the Bidder must estimate the total cost for the provision of learning product design and development services based on the all-inclusive per diem rates and the estimated volume of work listed in Table A5 below:

**Table A5**

Category	A <sub>5</sub> Estimated Average Days of Effort per Year	Initial Contract Period		Option Year 1		Option Year 2		C <sub>5</sub> + E <sub>5</sub> + G <sub>5</sub> Sub-Total
		B <sub>5</sub> Per diem rate (\$)	C <sub>5</sub> Sub-Total 3A <sub>5</sub> x B <sub>5</sub>	D <sub>5</sub> Per diem rate (\$)	E <sub>5</sub> Sub-Total A <sub>5</sub> x D <sub>5</sub>	F <sub>5</sub> Per diem rate (\$)	G <sub>5</sub> Sub-Total A <sub>5</sub> x F <sub>5</sub>	
Learning Product Manager	135							
Instructional Designer - eLearning	80							
Writer	90							
Text Editor	65							
Graphic Designer	230							
Web Designer/ Developer	75							

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E-Learning Designer and Developer	110									
Database Developer/Administrator	200									
Media Production Specialist	25									
IT Support Specialist	20									
<b>Sub-Total Table A5:</b>										

A work day is defined as 8 hours of work, exclusive of meal breaks. Payment shall be made for days actually worked, with no provision for annual leave, statutory holidays and sick leave. If time worked is more or less than a day, the daily rate shall be prorated to reflect the actual time worked.

#### **6.0 Research and Strategic Advisory Services Related to Learning**

The Bidder must quote firm all-inclusive **per diem** rates (\$CAD) for the provision of research and strategic advisory resources, as described in Section 3.6 of the Statement of Work. Research and advisory services related to learning involves: liaising with CFSC personnel; performing high-level needs analyses and providing strategic advice and solutions related to all aspects of intercultural learning; and research of best practices and new approaches and technologies for learning.

For the purposes of evaluation, the Bidder must estimate the total cost for the provision of research and advisory services related to learning based on the all-inclusive per diem rates and the estimated volume of work listed in Table A6 below:

**Table A6**

Resource Level	Initial Contract Period		Option Year 1		Option Year 2	
	B <sub>6</sub>	C <sub>6</sub>	D <sub>6</sub>	E <sub>6</sub>	F <sub>6</sub>	G <sub>6</sub>
	Per diem rate (\$)	Sub-Total 3A <sub>6</sub> x B <sub>6</sub>	Per diem rate (\$)	Sub-Total A <sub>6</sub> x D <sub>6</sub>	Per diem rate (\$)	Sub-Total A <sub>6</sub> x F <sub>6</sub>
Senior						
Intermediate						
Support						
<b>Sub-Total Table A6:</b>						
						Sub-Total C <sub>6</sub> + E <sub>6</sub> + G <sub>6</sub>

A work day is defined as 8 hours of work, exclusive of meal breaks. Payment shall be made for days actually worked, with no provision for annual leave, statutory holidays and sick leave. If time worked is more or less than a day, the daily rate shall be prorated to reflect the actual time worked.

**7.0 Related Services and Resources**

The Bidder may be requested on occasion to provide on an as required and as needed basis other resources and services to support learning activities, including securing classrooms. Specifications for these resources are generally defined in the Statement of Work and will be further refined by the Contractor and outlined in a Task Authorization Form.

**Table A7**

A <sub>7</sub>	Initial Contract Period		Option Year 1		Option Year 2	
	B <sub>7</sub>	C <sub>7</sub>	D <sub>7</sub>	E <sub>7</sub>	F <sub>7</sub>	G <sub>7</sub>
Estimated Number of Required Classrooms	Monthly rate per classroom (\$)	Sub-Total 3A <sub>7</sub> x 12 x B <sub>7</sub>	Monthly rate per classroom (\$)	Sub-Total A <sub>7</sub> x 12 x D <sub>7</sub>	Monthly rate per classroom (\$)	Sub-Total A <sub>7</sub> x 12 x F <sub>7</sub>
55						
<b>Sub-Total – Table A7:</b>						
						Sub-Total C <sub>7</sub> + E <sub>7</sub> + G <sub>7</sub>

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## 8.0 CALCULATION OF TOTAL PRICE

For evaluation purposes, the total bid price will be calculated using Table A8 below as follows:

**Table A8**

Category	Table	Sub-Totals
1.0	Learning Event Coordination and Administration	Table A1
2.0	Learning Event Delivery and Facilitation	
2.1	Learning Event Delivery and Facilitation Locations in Canada	Table A2.1
2.2	Learning Event Delivery and Facilitation in International Locations	Table A2.2
3.0	Provision of Country Resource Personnel and Subject Matter Experts	
3.1	Provision of Country Resource Personnel	Table A3.1
3.2	Provision of Subject Matter Experts	Table A3.2
4.0	Learning Event Design and Development	Table A4
5.0	Learning Product Design and Development	Table A5
6.0	Research and Strategic Advisory Services related to Learning	Table A6
7.0	Related Services and Resources	Table A7
<b>Total Bid Price (Table A8):</b>		

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## PART 4 – EVALUATION PROCEDURES AND BASIS OF SELECTION

### 4.1 Evaluation Procedures

Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical evaluation criteria.

An evaluation team composed of representatives of Canada will evaluate the bids.

#### 4.1.1 Technical Evaluation

##### 4.1.1.1 Joint Venture Experience

- a) Where the Bidder is a joint venture with existing experience as that joint venture, it may submit the experience that it has obtained as that joint venture.

Example: A bidder is a joint venture consisting of members L and O. A bid solicitation requires that the bidder demonstrate experience providing maintenance and help desk services for a period of 24 months to a customer with at least 10,000 users. As a joint venture (consisting of members L and O), the bidder has previously done the work. This bidder can use this experience to meet the requirement. If member L obtained this experience while in a joint venture with a third party N, however, that experience cannot be used because the third party N is not part of the joint venture that is bidding.

- b) A joint venture bidder may rely on the experience of one of its members to meet any given technical criterion of this bid solicitation.

Example: A bidder is a joint venture consisting of members X, Y and Z. If a solicitation requires: (a) that the bidder have 3 years of experience providing maintenance service, and (b) that the bidder have 2 years of experience integrating hardware with complex networks, then each of these two requirements can be met by a different member of the joint venture. However, for a single criterion, such as the requirement for 3 years of experience providing maintenance services, the bidder cannot indicate that each of members X, Y and Z has one year of experience, totaling 3 years. Such a response would be declared non-responsive.

- c) Joint venture members cannot pool their abilities with other joint venture members to satisfy a single technical criterion of this bid solicitation. However, a joint venture member can pool its individual experience with the experience of the joint venture itself. Wherever substantiation of a criterion is required, the Bidder is requested to indicate which joint venture member satisfies the requirement. If the Bidder has not identified which joint venture member satisfies the requirement, the Contracting Authority will provide an opportunity to the Bidder to submit this information during the evaluation period. If the Bidder does not submit this information within the period set by the Contracting Authority, its bid will be declared non-responsive.

Example: A bidder is a joint venture consisting of members A and B. If a bid solicitation requires that the bidder demonstrate experience providing resources for a minimum number of 100 billable days, the bidder may demonstrate that experience by submitting either:

- Contracts all signed by A;
- Contracts all signed by B; or
- Contracts all signed by A and B in joint venture, or
- Contracts signed by A and contracts signed by A and B in joint venture, or
- Contracts signed by B and contracts signed by A and B in joint venture.

that show in total 100 billable days.

- d) Any Bidder with questions regarding the way in which a joint venture bid will be evaluated should raise such questions through the Enquiries process as early as possible during the bid solicitation period.

#### **4.1.1.2 Mandatory Technical Criteria**

Refer to Attachment 1 to Part 4.

#### **4.1.1.3 Reference Check**

- i. Canada reserves the right to check references to verify the accuracy of the information provided by the Offeror.
- ii. If Canada checks references, the checking will be done by email. Canada will send all email reference check requests to contacts supplied by the Offeror on the same day. The references will have 5 working days from the date of the sending of the email to reply. Canada will not consider that a mandatory criterion has been met and will not award any points if responses are received after the deadline has passed.
- iii. On the third working day after sending out the emails, if Canada has not received a response, Canada will notify the Offeror by email to allow the Offeror to contact his or her reference directly to ensure that the reference responds to Canada within 5 working days. If the named individual is unavailable during the evaluation period, the Offeror may provide the name and contact information of an alternate contact from the same client. Offerors will only be provided with this opportunity once for each client, which means that the Offeror cannot submit the name of another person if the originally named individual indicates that he or she does not want to reply or is unable to do so. The period of 5 working days will not be extended to allow the new person to respond.
- iv. Wherever information provided by a reference differs from the information supplied by the Offeror, the information supplied by the reference will be the information evaluated.
- v. Canada will not consider that a mandatory criterion has been met:
- (A) if the reference cannot provide the information requested or refuses to do so; and
  - (B) if the reference works for an affiliate or other entity that does not deal at arm's length with the Offeror.

#### **4.1.1.4 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**

4.1.2.1 For bid evaluation and Contractor selection purposes only, the evaluated price of a bid will be determined in accordance with the Pricing Schedule detailed in Attachment 1 to Part 3.

#### **4.1.2.2 Mandatory Financial Criteria**

Refer to Attachment 1 to Part 4.

## **4.2 Basis of Selection**

### **4.2.1. Lowest Evaluated Price per Point**

4.2.1.1 To be declared responsive, a bid must:

- (a) comply with all the requirements of the bid solicitation;
- (b) meet all 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.

4.2.1.2 Bids not meeting 4.2.1.1 (a) or (b) or (c) will be declared non-responsive. Neither the responsive bid obtaining the highest number of points nor the one with the lowest evaluated price will necessarily be accepted.

4.2.1.3 The evaluated price per point of a responsive bid will be determined by dividing its evaluated price by the overall score it obtained for all the point rated technical criteria detailed in Attachment 1 to Part 4.

4.2.1.4 The responsive bid with the lowest evaluated price per point will be recommended for award of a contract. In the event two or more responsive bids have the same lowest evaluated price per point, the responsive bid that obtained the highest overall score for all the point rated technical criteria detailed in Attachment 1 to Part 4 will be recommended for award of a contract.

## ATTACHMENT 1 TO PART 4, TECHNICAL CRITERIA

### **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.

In order to respond to the criteria listed in this document, the bidder's experience must correspond to work undertaken by the bidder in the context of a contract or other arrangement with a separate entity.

Experience mentioned without any information to support or describe how it was acquired will not be taken into consideration during the evaluation of the bid.

Experience that is cited, including project examples, must clearly demonstrate the bidder's expertise in the matter of the services described in Annex A Statement of Work. The relevance of this experience will be evaluated in accordance with the elements described in the Statement of Work.

For this evaluation, the period for allowable experience will be calculated until the closing date of this Request for Proposal.

### **SUMMARY**

The following table (Table B1) summarizes the Mandatory Technical Requirements (MTC).

**Table B1**

<b>Criteria</b>	
<b>MTC</b>	<b>Experience of the Bidder</b>
<b>MTC 1</b>	<b>Learning Event Coordination and Administration</b>
MTC 1 a	5 years' learning event coordination and administration experience
MTC 1 b	Coordinated and administered 225 events involving 5000 participants in 12 month period
<b>MTC 2</b>	<b>Learning Event Delivery and Facilitation</b>
MTC 2a	5 years' learning event delivery and facilitation experience
MTC 2b	Delivered/facilitated 225 events involving 5000 participants in 12 month period
<b>MTC 3</b>	<b>Provision of Country Resource Personnel and Subject Matter Experts</b>
MTC 3a	5 years' experience in sourcing and managing CRPs and/or SMEs
MTC 3b	Provided 300 CRPs and/or SMEs in support of 100 learning events in 12 month period
<b>MTC 4</b>	<b>Learning Event Design and Development</b>
MTC 4	10 learning events designed and developed
<b>MTC 5</b>	<b>e-Learning Product Design and Development</b>
MTC 5	10 e-learning products designed and developed
<b>MTC 6</b>	<b>Web Product Design and Development</b>
MTC 6	5 learning-related web products designed and developed
<b>MTC 7</b>	<b>Database Development/Administration</b>
MTC 7	4 Custom Database Development Applications
<b>MTC 8</b>	<b>Media Production</b>
MTC 8	5 videos or motion graphics supporting learning produced
<b>MTC 9</b>	<b>Print Product Design and Development</b>
MTC 9a	Five hundred (500) days of graphic design

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MTC 9b	One hundred (100) discreet learning support print products
<b>MTC 10</b>	<b>Research and Strategic Advisory Services</b>
MTC 10	5 research and/or strategic advisory projects
<b>MTC 11</b>	<b>Bidder's Resources</b>
<b>MTC 11.1</b>	Account Manager
<b>MTC 11.2</b>	Country Resource Personnel (CRP) and Subject Matter Experts (SME) Coordinator
<b>MTC 11.3</b>	Learning Product Manager

## MTC EXPERIENCE OF THE BIDDER

The same example project may be submitted as demonstration of compliance to more than one requirement, although Bidders must submit separate summaries for each requirement and clearly indicate for which requirement the example project should be considered.

### MTC 1 Learning Event Coordination and Administration

a. The Bidder must have a minimum of five (5) years' experience within the past ten (10) years up to the bid solicitation closing date in providing learning event coordination and administration services similar to those identified in Section 3.1 of the Statement of Work.

For the experience cited, the Bidder must provide a summary list of projects in the format below:

(mm-yy)		Client Organization	Learning Events	Description of Services Provided (should not exceed 50 words)
Start	End			

b. The Bidder must have provided learning event coordination and administration services similar to those identified in Section 3.1 of the Statement of Work for at least two hundred and twenty-five (225) learning event deliveries involving a total of at least five thousand (5,000) participants within a twelve (12) month consecutive period within the past seven (7) years.

For the experience cited, the Bidder must provide a summary list of learning events in the format below:

(mm-yy)		Client Organization	Learning Events	# Deliveries	# Parti- pants	Services Provided (should not exceed 50 words)
Start	End					

### MTC 2 Learning Event Delivery and Facilitation

a. The Bidder must have minimum of five (5) years' experience within the past ten (10) years up to the bid solicitation closing date in providing learning event delivery and facilitation services pertaining specifically to

intercultural effectiveness training in an international environment as identified in Section 3.2 of the Statement of Work.

For the experience cited, the Bidder must provide a summary list of projects in the format below:

(mm-yy)		Client	Learning Events	Description of Services Provided ( <i>should not exceed 50 words</i> )
Start	End	Organization		

b. The Bidder must have provided learning event delivery and facilitation services as identified in Section 3.2 of the Statement of Work, for at least two hundred and twenty-five (225) learning event deliveries involving a total of at least five thousand (5,000) participants within a twelve (12) month consecutive period within the past seven (7) years up to the bid solicitation closing date.

For the experience cited, the Bidder must provide a summary list of projects in the format below:

(mm-yy)		Client Organization	Learning Events	# Deliveries	# Particip ants	Services Provided ( <i>should not exceed 50 words</i> )
Start	End					

**MTC 3 Provision of Country Resource Personnel (CRP) and Subject Matter Experts (SMEs)**

a. The Bidder must have a minimum of five (5) years' experience within the past ten (10) years up to the bid solicitation closing date in identifying, sourcing and managing country resource personnel (CRP) and/or subject matter experts (SMEs) as identified in Section 3.3 of the Statement of Works. With regard to this requirement, the CRP and/or SMEs may not necessarily be the facilitator, but rather contribute to a facilitated learning event.

For the experience cited, the Bidder must provide a summary list of learning programs in the format below:

(mm-yy)		Learning Program	Client Organization	Type and Role of SMEs	Services Provided ( <i>should not exceed 50 words</i> )
Start	End				

b. The Bidder must have provided CRP and/or SME identification, sourcing and management services in support of learning events as identified in Section 3.3 of the Statement of Work for at least one hundred (100) learning event deliveries involving a total of at least three hundred (300) CRP and/or SMEs within a twelve (12) month consecutive period within the past seven (7) years up to the bid solicitation closing date. With regard to this requirement, the CRPs and/or SMEs may not necessarily be the facilitator, but rather contribute in the classroom to a facilitated learning event.

For the experience cited, the Bidder must provide a summary list of projects in the format below:

(mm-yy)	Learning Program	Services Provided
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Start	End	Client Organization	# Events	# SMEs/CRPs	(should not exceed 50 words)

**MTC 4 Learning Event Design and Development**

a. The Bidder must have provided learning event design and development services, as identified in Section 3.4 of the Statement of Work, for at least ten (10) projects within the past ten (10) years up to the bid solicitation closing date. Each of the ten (10) projects must have been performed under separate contracts and/or task authorizations.

For the experience cited, the Bidder must provide a summary list of projects in the format below:

(mm-yy) Start	End	Client Organization	Learning Design Course Title	Description of Learning Design and Development Process and Outcome (should not exceed 50 words)

**MTC 5 e-Learning Product Design and Development**

a. The Bidder must have provided e-learning product design and development services similar to those identified in Section 3.5 of the Statement of Work for at least ten (10) e-learning products within the past ten (10) years up to the bid solicitation closing date. Sample projects must be intended for a similar audience as described in 1.0 of the Statement of Work. Each product must be an electronic (internet, intranet, DVD-ROM, or CD-ROM, Kiosk based, Web app or similar) asynchronous product comprising a minimum of 25 screens. A minimum of five (5) of these products must have been produced in both official languages.

For the experience cited, the Bidder must provide a summary list of projects in the format below:

(mm-yy) Start	End	Client Organization	e-Learning Products	Description of e-Learning Product	Description of Services Provided (should not exceed 50 words)

**MTC 6 Web Product Design and Development**

a. The Bidder must have provided web design and development services similar to those identified in Section 3.5 of the Statement of Work for at least five (5) web products within the past ten (10) years up to the bid solicitation closing date. A minimum of one (1) product must meet GOC WCAG 2.0 standards. A minimum of three (3) products must have been produced in both official languages.

For the experience cited, the Bidder must provide a summary list of projects in the format below:

(mm-yy) Start	End	Client Organization	Web Products	Description of Web Products	Description of Services Provided (should not exceed 50 words)

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**MTC 7 Database Development/Administration**

a. The Bidder must have provided database development and administration services similar to those identified in Section 3.5 of the Statement of Work for at least four (4) custom database development products within the past ten (10) years up to the bid solicitation closing date.

For the experience cited, the Bidder must provide a summary list of projects in the format below:

(mm-yy) Start	End	Client Organization	Database Application	Description of Product	Description of Services Provided ( <i>should not exceed 50 words</i> )

**MTC 8 Media Production**

a. The Bidder must have provided media production services similar to those identified in Section 3.5 of the Statement of Work for at least five (5) videos, motion graphics or similar intended as a stand-alone learning tools or integrated into learning resource packages within the past ten (10) years up to the bid solicitation closing date.

For the experience cited, the Bidder must provide a summary list of projects in the format below:

(mm-yy) Start	End	Client Organization	Media Product	Description of Media	Description of Services Provided ( <i>should not exceed 50 words</i> )

**MTC 9 Print Product Design and Development**

a. The Bidder must have provided document graphic design and print production services, similar to those identified in Section 3.5 of the Statement of Work, in support of learning programs. The minimum level of effort for graphic design services must be five hundred (500) days of graphic design within the last five (5) years up to the bid solicitation closing date.

(mm-yy) Start	End	Client Organization	Product(s)	Level of Effort (Days)	Description of Services Provided ( <i>should not exceed 50 words</i> )

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b. The Bidder must have produced a minimum of one hundred (100) discreet learning support print products over the last seven (7) years up to the bid solicitation closing date. A minimum of fifty (50) products must have been produced in both official languages.

(mm-yy)		Client Organization	Title of Learning Support Print Product	Description of Services Provided (should not exceed 50 words)
Start	End			

**MTC 10 Research and Strategic Advisory Services**

a. The Bidder must have provided research and/or strategic advisory services, as identified in Section 3.6 of the Statement of Work, for at least five (5) projects within the past ten (10) years up to the bid solicitation closing date. Each of the five (5) projects must have been performed under separate contracts and/or task authorizations.

For the experience cited, the Bidder must provide a summary list of projects in the format below:

(mm-yy)		Project	Client Organization	Description of Services Provided (should not exceed 50 words)
Start	End			

**MTC 11 BIDDER RESOURCES**

The Bidder must provide evidence that they possess qualified human resources capable of providing overall account management, sourcing country resource personnel and subject matter experts and learning product design and development.

In order to substantiate that each individual proposed for a given resource category meets the minimum qualifications specified in Section 8.0 - Personnel Categories and Minimum Qualifications of Annex A Statement of Work, the Bidder must provide the summary information indicated in the tables provided for each requirement. The Bidder must also provide a curriculum vitae (C.V.) for each evaluated resource in each resource category who meets the minimum resource qualifications. It is the sole responsibility of the Bidder to ensure that submitted C.V.s are sufficiently detailed to demonstrate each resource meets the minimum resource qualifications. Failure to provide sufficient information may render the bid non-compliant and the proposal will be given no further consideration.

For the purpose of evaluating MTC 11.1, 11.2 and 11.3, in the event the proposed resource studied at an institution outside of Canada, only an equivalency assessment issued by a Canadian academic credentials assessment service will be accepted. The agencies and organizations performing this service are listed on the Web site of the Canadian Information Centre for International Credentials at <http://www.cicic.ca/413/assessment-of-credentials-for-employment-in-canada.canada>

**MTC 11.1 Account Manager**

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The Bidder must have one (1) Account Manager dedicated to providing the services identified in Section 5.4 of the Statement of Work and meeting the minimum qualifications. The Bidder must provide the name of one Account Manager and demonstrate how she or he meets the following requirements:

Has a degree or diploma from a recognized university or post-secondary institution;

Has five (5) years demonstrated experience as an Account Manager within the past ten (10) years

Has had three (3) assignments or projects acting as an Account Manager, at least one (1) of which valued at over \$1,000,000 (\$CAD) in the last ten (10) years, and at least one (1) of which related to learning; and

Is fluent in either French or English.

To demonstrate the acquired experience in MTC 11.1 b), the Bidder must provide a detailed description of each project or work assignment that demonstrates the experience in account management, including:

- a) The start and end dates (from mm/yy to mm/yy) of the acquired experience;
- b) The role played in the project or work assignment;
- c) The name and contact information of the client.

### **MTC 11.2 Country Resource Personnel and Subject Matter Experts Coordinator**

The Bidder must have at least one (1) CRP/SME Coordinator capable of providing the services identified in Section 3.3 of the Statement of Work and meeting the minimum qualifications. The Bidder must provide the name of one CRP/SME Coordinator and demonstrate how she or he meets the following requirements:

- a) Has a degree or diploma from a recognized university or post-secondary institution OR Three (3) years' demonstrated experience recruiting and managing human resources in the last ten (10) years; and
- Is fluent in French and English.

To demonstrate the acquired experience in MTC 11.2 b), the Bidder must provide a detailed description of each project or work assignment that demonstrates the experience in CRP/SME coordination, including:

- a) The start and end dates (from mm/yy to mm/yy) of the acquired experience;
- b) The role played in the project or work assignment;
- c) The name and contact information of the client.

### **MTC 11.3 Learning Product Manager**

The Bidder must have at least one (1) Learning Product Manager capable of providing the services identified in Section 3.5 of the Statement of Work and meeting the minimum qualifications. The Bidder must provide the name of one Learning Product Manager and demonstrate how she or he meets the following requirements:

Has a degree or diploma from a recognized university or post-secondary institution in Audio-Visual Technology, Computer Science, Journalism, Broadcasting, Multimedia Production, or a related field;

Has five (5) years of demonstrated project management experience developing e-learning, web, multimedia, video, print or similar media products and services in the last ten (10) years;

In the role of manager or team lead within the past five (5) years, has produced or project managed the development of:

- five (5) e-Learning products,
- two (2) websites,
- two (2) videos/media products,
- five (5) print documentation packages; and
- Is fluent in both English and French.

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To demonstrate the acquired experience in MTC 11.3 b) and c), the Bidder must provide a detailed description of each project or work assignment that demonstrates the experience in learning product management, including:

- a) The start and end dates (from mm/yy to mm/yy) of the acquired experience;
- b) The role played in the project or work assignment;
- c) The name and contact information of the client.

### **POINT RATED TECHNICAL CRITERIA**

Each Technical Bid which meets all the Mandatory Technical Criteria specified above, will be evaluated and scored in accordance with the following point-rated technical criteria.

#### **Summary**

The following table (Table B2) summarizes the point-rated technical criteria (PRTC). Bidders must meet or exceed the minimum number of points for each section, i.e. 60% of the maximum points overall for each of sections PRTC1- PRTC3, and the minimum number of points overall, i.e. 70%, for the aggregate points for all sections PRTC1- PRTC3.

**Table B2**

	<b>Criteria</b>	<b>Maximum Points</b>	<b>Minimum Points</b>
<b>PRTC 1</b>	<b>Experience of the Bidder</b>	<b>105</b>	<b>63 (60%)</b>
PRTC1.1	Learning Event Delivery and Facilitation	35	
PRTC1.2	Learning Event Design and Development	10	
PRTC1.3	e-Learning Product Design and Development	15	
PRTC1.4	Web Product Design and Development	10	
PRTC1.5	Database Development and Administration	10	
PRTC1.6	Media Production	10	
PRTC1.7	Print Product Design and Development	10	
PRTC1.8	Research and Strategic Advisory Services related to Learning	5	
<b>PRTC 2</b>	<b>Approach and Methodology</b>	<b>21</b>	<b>13 (60%)</b>
PRTC2.1	Governance Structure and Client Relationship Management	5	
PRTC2.2	Approach to Competency-Based Training	5	
PRTC2.3	Quality Assurance	6	
PRTC2.4	Provision of Country Resource Personnel and Subject Matter Experts	5	
<b>PRTC 3</b>	<b>Understanding of the Requirement</b>	<b>6</b>	<b>3.5 (60%)</b>
PRTC 3.1	Risks/Issues and Response Strategy	6	
	<b>Total Score and Minimum Pass Mark:</b>	<b>132</b>	<b>92 (70%)</b>

#### **PRTC 1 EXPERIENCE OF THE BIDDER (105 points)**

Points will be awarded for each of the Bidder's example projects cited in response to point rated technical criteria PRTC 1.1 - PRTC 1.8 according to the following table (Table B3):

**Table B3**

Assessment	Score	Description
Excellent	100%	The example project is outstanding and/or exceptional: the nature of the project is similar in all aspects to projects that CFSC performs; the services provided demonstrate performance of all aspects of the work described in the relevant section(s) of CFSC's Statement of Work;

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		the project scale is equal to or greater than that of CFSC's typical operations; and the project was conducted in the past three (3) years.
Good	85%	The example project is superior: the nature of the project is similar in all key aspects to projects that CFSC performs; the services provided demonstrate performance of all key aspects of the work described in the relevant section(s) of CFSC's Statement of Work; the project scale is generally similar to that of CFSC's typical operations; and the project was conducted in the past five (5) years.
Acceptable	60%	The example project is sufficient: the nature of the project is generally similar to projects that CFSC performs; the services provided generally demonstrate performance of the work described in the relevant section(s) of CFSC's Statement of Work; the project scale is somewhat smaller than that of CFSC's typical operations; and the project was conducted in the past seven (7) years.
Poor	25%	The example project is deficient: the nature of the project is not similar in key aspects to projects that CFSC performs; the services provided do not demonstrate performance of key aspects of the work described in the relevant section(s) of CFSC's Statement of Work; the project scale was considerably smaller than that of CFSC's typical operations; or the project was performed in the past seven (7) years, but not the past six (6) years.
Unacceptable	0%	The example project is unacceptable: the project is not described in sufficient detail; the nature of the project is not similar to projects that CFSC performs; the services provided demonstrate performance of few aspects of the work described in the relevant section(s) of CFSC's Statement of Work; the project scale was not at all comparable to CFSC's typical operations; or the project was not performed in the past seven (7) years.

**PRTC 1.1 Learning Event Delivery and Facilitation (35 points)**

The Bidder must have provided learning event delivery and facilitation services pertaining specifically to intercultural effectiveness training in an international environment as identified in Section 3.2 of the Statement of Work, for at least one (1) project within the past seven (7) years up to the bid solicitation closing date. The Bidder will be evaluated on the example project for which up to thirty five (35) points will be awarded.

For the example project, the Bidder must provide the following information (should not exceed two (2) pages):

- Project Name:
- Client Organization:
- Start date (mm-yy):
- End date (mm-yy):
- Summary Description of Learning Program (include aim of learning program, profile of learners, learning event delivery and facilitation services provided, as well as volumes (number of programs and learners):
- Client reference:
- Name, title:
- Telephone number, or:
- Email address:

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### **PRTC 1.2 Learning Event Design and Development (10 points)**

The Bidder must have provided learning event design and development services similar to those identified in Section 3.4 of the Statement of Work, for one (1) project within the past five (5) years up to the bid solicitation closing date. The Bidder will be evaluated on the example project for which up to ten (10) points will be awarded.

For the example project, the description of the course development project proposed must at a minimum include: analysis of learning needs, the intended audience, identification of performance objectives, design and training methodology, description of the methodologies used during the course, the format of the course and the outcome evaluation framework. The following information is also required:

Project Name:  
Client Organization:  
Start date (mm-yy):  
End date (mm-yy):  
Client reference:  
Name, title:  
Telephone number, or:  
Email address:

### **PRTC 1.3 e-Learning Product Design and Development (15 points)**

The Bidder must have provided e-learning product design and development services similar to those identified in Section 3.5 of the Statement of Work, for at least three (3) projects involving the development of an e-learning product within the past seven (7) years up to the bid solicitation closing date. Sample projects must be intended for a similar audience as described in 1.0 of the Statement of Work and must be intended for intercultural effectiveness training and development. Each product must be an electronic (internet, intranet, Learning Management System (LMS), DVD-ROM, or CD-ROM, Kiosk based, Web app or similar) asynchronous product comprising a minimum of 25 screens.

For the example projects, the Bidder must provide the following information in the format below (should not exceed two (2) pages per project):

Project Name:  
Client Organization:  
Start date (mm-yy):  
End date (mm-yy):  
Client reference:  
Name, title:  
Telephone number, or:  
Email address:

Summary description of project, including description of e-Learning product(s); aim of the e-Learning product(s); product functionality and content; intended audience; and e-Learning product design and development services provided.

The Bidder must also provide screen captures demonstrating the graphic design, multimedia elements, interactivity, and product functionality.

The Bidder will be evaluated on the example projects for which up to fifteen (15) points will be awarded.

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**PRTC 1.4 Web Product Design and Development (10 points)**

The Bidder must have provided web design and development services similar to those identified in Section 3.5 of the Statement of Work, for at least two (2) projects involving the development of a web product within the past seven (7) years up to the bid solicitation closing date.

For the example projects, the Bidder must provide the following information in the format below (should not exceed two (2) pages per project):

Project Name:  
Client Organization:  
Start date (mm-yy):  
End date (mm-yy):  
Client reference:  
Name, title:  
Telephone number, or:  
Email address:

Summary description of project, including description of Web product(s); aim of the Web product(s); web product content; intended audience; and e-Learning product design and development services provided.

The Bidder must also provide screen captures demonstrating the graphic design, multimedia elements, interactivity, and functionality.

The Bidder will be evaluated on the example projects for which up to ten (10) points will be awarded.

**PRTC 1.5 Database Development/Administration (10 points)**

The Bidder must have provided database development and administration services similar to those identified in Section 3.5 of the Statement of Work for at least two (2) projects within the past seven (7) years up to the bid solicitation closing date in support of coordination, administration, financial administration, learning portal (including LMS), assessment or similar type custom database applications in support of a learning environment.

For the example projects, the Bidder must provide the following information in the format below (should not exceed two (2) pages per project):

Project Name:  
Client Organization:  
Start date (mm-yy):  
End date (mm-yy):  
Client reference:  
Name, title:  
Telephone number, or:  
Email address:

Summary description of project, including description of database application(s); aim of the database application; platform; intended audience; and database development and administration services provided.

The Bidder will be evaluated on the example projects for which up to ten (10) points will be awarded.

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**PRTC 1.6 Media Production (10 points)**

The Bidder must have provided media production services similar to those identified in Section 3.5 of the Statement of Work, for at least two (2) projects involving the production of a video, motion graphic or similar within the past seven (7) years up to the bid solicitation closing date. The products must have been intended as a stand-alone learning tool or integrated into learning resource packages.

For the example projects, the Bidder must provide the following information in the format below (should not exceed two (2) pages per project):

Project Name:  
Client Organization:  
Start date (mm-yy):  
End date (mm-yy):  
Client reference:  
Name, title:  
Telephone number, or:  
Email address:

Summary description of project, including description of media; instructional aim of the media; duration of media; intended audience; and media production services provided.

The Bidder will be evaluated on the example projects for which up to ten (10) points will be awarded.

**PRTC 1.7 Print Product Design and Development (10 points)**

The Bidder must provide a copy of the table of contents of two (2) of the projects listed in MTC 9 (in both official languages) and a representative excerpt not to exceed ten (10) pages each. The Bidder will be evaluated on the projects, for which up to ten (10) points will be awarded.

**PRTC 1.8 Research and Strategic Advisory Services related to Learning (5 points)**

The Bidder must have provided research and strategic advisory services related to learning similar to those identified in Section 3.6 of the Statement of Work, for at least one (1) project within the past five (5) years.

For the example project, the Bidder must provide the following information in the format below (should not exceed two (2) pages):

Project Name:  
Client Organization:  
Start date (mm-yy):  
End date (mm-yy):  
Client reference:  
Name, title:  
Telephone number, or:  
Email address:

Summary description of project, including description of the research and/or strategic analysis conducted (including research and/or analysis methods); aim of the project; project results; intended audience; and research and strategic advisory services provided.

The Bidder will be evaluated on the example projects for which up to five (5) points will be awarded.

**PRTC 2 APPROACH and METHODOLOGY (21 points)**

Bidders must indicate, through a written description that should not exceed two (2) pages for each requirement PRTC 2.1 - PRTC 2.4 (e.g. eight (8) pages total for the response to PRTC 2), their approach and methodology in response to the requirement indicated below, with respect to the provision of services described in the Statement of Work. The Bidder should identify previous projects, where applicable, in which the Bidder has implemented the proposed approach and methodology

Points will be awarded for each aspect of the Bidder's proposed approach and methodology cited in response to point rated requirements PRTC 2.1 - PRTC 2.4 according to the following table (Table B4):

**Table B4**

Assessment	Score	Description
Excellent	100%	The response is outstanding and/or exceptional: the approach/methodology is highly relevant to CFSC's operational context; the approach/methodology is extremely thorough in addressing the requirement; the approach/methodology would greatly enhance the successful delivery of CFSC learning programs; the approach/methodology would be very simple and cost-effective to implement; and projects that have been cited demonstrate that all aspects of the proposed approach/methodology have been implemented by the Bidder.
Good	85%	The response is superior: the approach/methodology is relevant to CFSC's operational context; the approach/methodology is thorough in addressing the requirement; the approach/methodology would enhance the successful delivery of CFSC learning programs; the approach/methodology would be simple and cost-effective to implement; and projects that have been cited demonstrate that some aspects of the proposed approach/methodology have been implemented by the Bidder.
Acceptable	60%	The response is minimally sufficient: the approach/methodology is generally relevant to CFSC's operational context; the approach/methodology addresses most aspects of the requirement; the approach/methodology would somewhat enhance the successful delivery of CFSC learning programs; and the approach/methodology would be feasible to implement and affordable.
Poor	25%	The response is deficient: the approach/methodology is generally not relevant to CFSC's operational context; the approach/methodology does not address key aspects of the requirement; the approach/methodology would not significantly enhance the successful delivery of CFSC learning programs; or the approach/methodology would not be cost-effective or practical to implement.
Unacceptable	0%	The response is unacceptable: the approach/methodology is not described; the approach/methodology is not relevant to CFSC's operational context; the approach/methodology would not enhance the successful delivery of CFSC learning programs; or the approach/methodology would be cost-prohibitive or impractical to implement.

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**PRTC 2.1 Governance Structure and Client Relationship Management (5 points)**

The Bidder must provide its approach and methodology to manage the relationship with CFSC, to govern relationships between team members, and to govern relationships between team members and their CFSC counterparts, for which up to five (5) points will be awarded.

**PRTC 2.2 Competency-Based Approach (5 points)**

The Bidder must provide its approach and methodology for competency-based training, for which up to five (5) points will be awarded.

**PRTC 2.3 Quality Assurance (6 points)**

The Bidder must provide its approach and methodology to maximize the quality of each of the following:

- a. learning event coordination and administration;
- b. learning event delivery and facilitation; and
- c. learning event design and development.

The Bidder will be evaluated on its approach and methodology to perform quality assurance in three (3) areas submitted up to two (2) points will be awarded for each of the three (3) areas.

**PRTC 2.4 Provision of Country Resource Personnel and Subject Matter Experts (5 points)**

The Bidder must provide its approach and methodology to identify, source, manage, track and evaluate the performance of numerous resources with recent and relevant country-specific knowledge, and subject matter experts with expertise in specific geographic regions and/or professional sectors such as international development, diplomacy, defence and international trade in support of CFSC learning events. The Bidder will be evaluated on its approach and methodology for which up to five (5) points will be awarded.

Note that the Bidder cannot assume access to the roster of country resource personnel and subject matter experts currently managed by CFSC's current service provider.

The Bidder will be evaluated on its approach and methodology to identify, source and manage resources with current country-specific knowledge, and subject matter experts with expertise in specific geographic regions and/or professional sectors such as international development, diplomacy, defence and international trade, for which up to five (5) points will be awarded.

**PRTC 3 UNDERSTANDING OF THE REQUIREMENT (6 points)**

**PRTC 3.1 Risks/Issues and Response Strategy (6 points)**

The Bidder must identify and describe one (1) of the most significant risks or issues potentially impeding the operational success of CFSC learning programs, as well as a proposed mitigation strategy, for each of the following three (3) areas (i.e. three (3) risks/issues overall):

- a. learning event coordination and administration;
- b. learning event delivery and facilitation; and
- c. learning product design and development.

The response should not exceed two (2) pages for each requirement PRTC 3.1 a-c (e.g. six (6) pages total for the response to PRTC3). For each of the three (3) risks and/or issues and associated response strategy, up to two (2) points will be awarded according to the following table (Table B5):

**Table B5**

Assessment	Score	Description
Excellent	100%	The response is outstanding and/or exceptional: the risk/issue identified is one of the most significant impediments to CFSC operational success; the description of the risk/issue demonstrates an in-depth understanding of its cause and effect; the proposed response strategy would be very effective at mitigating the risk/issue; and the proposed response strategy would be simple and cost-effective to implement.
Good	85%	The response is superior: the risk/issue identified is a significant impediment to CFSC operational success; the description of the risk/issue demonstrates a well-grounded understanding of its cause and effect; the proposed response strategy would be effective at mitigating the risk/issue; and the proposed response strategy would be relatively simple and cost-effective to implement.
Acceptable	60%	The response is minimally sufficient: the risk/issue identified is an impediment to CFSC operational success; the description of the risk/issue demonstrates general understanding of its cause and effect; the proposed response strategy would partially mitigate the risk/issue; and the proposed response strategy would be feasible to implement and affordable.
Poor	25%	The response is deficient: the risk/issue identified is not a significant impediment to CFSC operational success; the description of the risk/issue demonstrates only partial or incorrect understanding of its cause and effect; the proposed response strategy would not significantly mitigate the risk/issue; or the proposed response strategy would not be cost-effective or practical to implement.
Unacceptable	0%	The response is unacceptable: the risk/issue and/or mitigation strategy is not described; the risk/issue identified does not apply to the CFSC context; the proposed response strategy would not mitigate the risk/issue; or the proposed response strategy would be cost-prohibitive or impractical to implement.

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## 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 and Additional Information Required with the 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) (<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.

### 5.2 Certifications and Information Required Precedent to Contract Award

The required certifications and additional information below should be submitted with the bid but may be submitted afterwards. If the required certifications and additional information are not submitted with the bid, the Contracting Authority will inform the Bidder of a time frame within which they must be submitted by the Bidder. Failure to provide the required certifications and additional information 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) (<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](http://www.esdc.gc.ca/en/jobs/workplace/humanrights/employmentequity/federalcontractorprogram.page?&_ga=1.229006812.1158694905.1413548969#afed) website ([http://www.esdc.gc.ca/en/jobs/workplace/humanrights/employmentequity/federalcontractorprogram.page?&\\_ga=1.229006812.1158694905.1413548969#afed](http://www.esdc.gc.ca/en/jobs/workplace/humanrights/employmentequity/federalcontractorprogram.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 the "FCP Limited Eligibility to Bid" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed Federal Contractors Program for Employment Equity certification before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority before contract award with a completed Federal Contractors

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Program for Employment Equity certification for each member of the Joint Venture. Attachment 1 to Part 5, Additional Certifications Precedent to Contract Award, includes a copy of the certification to provide.

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

The required additional certifications to provide are included in Attachment 1 to Part 5, Additional Certifications Required Precedent to Contract Award .

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## ATTACHMENT 1 TO PART 5, ADDITIONAL CERTIFICATIONS REQUIRED PRECEDENT TO CONTRACT AWARD

### 1. Federal Contractors Program For Employment Equity - Certification

I, the Bidder, by submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated below. 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 any request or requirement imposed by Canada may render the bid non-responsive or constitute a default under the Contract.

For further information on the Federal Contractors Program for Employment Equity visit [Employment and Social Development Canada \(ESDC\)-Labour's](#) website.

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

Instructions to the Bidder: Complete both A and B.

A. Instructions to the Bidder: Check only one of the following:

- A1. The Bidder certifies having no work force in Canada.
- A2. The Bidder certifies being a public sector employer.
- A3. The Bidder certifies being a [federally regulated employer](#) being subject to the [Employment Equity Act](#).
- A4. The Bidder certifies having a combined work force in Canada of less than 100 permanent full-time and / or permanent part-time employees.
- A5. The Bidder certifies having a combined workforce in Canada of 100 or more permanent full-time and/or permanent part-time employees.
- A5.1. The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with ESDC-Labour.

or

- A5.2. The Bidder certifies having submitted the [Agreement to Implement Employment Equity \(LAB1168\)](#) to ESDC-Labour. As this is a condition to contract award, proceed to completing the form [Agreement to Implement Employment Equity \(LAB1168\)](#), duly signing it, and transmit it to ESDC-Labour.

B. Instructions to the Bidder: Check only one of the following:

- B1. The Bidder is not a Joint Venture.

or

- B2. The Bidder is a Joint venture. Instructions to the Bidder: Refer to the Joint Venture section of the Standard Instructions. If the Bidder is a Joint Venture, it must provide the Contracting Authority

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before contract award with a completed Federal Contractors Program for Employment Equity certification for each member of the Joint Venture.

## **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.

## **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.

## **4. Access to Facilities and Equipment**

Canada's facilities, equipment, documentation and personnel are not automatically at the disposal of the Contractor. If access to government premises, computer systems (micro computer network), working space, telephones, terminals, documentation and personnel for consultation is required by the Contractor to perform the Work, the Contractor must advise the Contracting Authority of the need for such access in a timely fashion. If the Contractor's request for access is approved by Canada and arrangements are made to provide access to the Contractor, the Contractor, its subcontractors, agents and employees must comply with all the conditions applicable at the Work site. The Contractor must further ensure that the facilities and equipment are used solely for the performance of the Contract.

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## PART 6 – SECURITY, FINANCIAL AND OTHER REQUIREMENTS

### 6.1 Security Requirement

6.1.1 Before award of a contract, the following conditions must be met:

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

6.1.2 Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful Bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.

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

### 6.2 Financial Capability

SACC Manual clause A9033T(2012-07-16) Financial Capability

### 6.3 Insurance Requirements

The Bidder must provide a letter from an insurance broker or an insurance company licensed to operate in Canada stating that the Bidder, if awarded a contract as a result of the bid solicitation, can be insured in accordance with the Insurance Requirements specified in Annex D – “Insurance Requirements”.

If the information is not provided in the bid, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.

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## 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 Task Authorization

**A.** Work described at Annex A, Statement of Work, will be performed under the Contract on an “as and when requested basis”.

**B.** With respect to the Work mentioned under paragraph A of this clause,

1. an obligation will come into force only when the Contractor receives a Task Authorization (TA), inclusive of any revisions, authorized and issued in accordance with this clause, and only to the extent designated in the authorized TA;
2. the TA Authority and limit will be determined in accordance with paragraph C of this clause;
3. the Contractor must not commence work until a TA, inclusive of any revisions, has been authorized and issued in accordance with the Contract. The Contractor acknowledges that work performed before a TA, inclusive of any revisions, has been authorized and issued in accordance with the Contract will be done at the Contractor's own risk and expense;
4. the task description, inclusive of any revisions, included in an authorized TA must fall within the scope of the Statement of Work, in Annex A; and
5. the TA, inclusive of any revisions, will be authorized under the Contract through the use of Annex D Task Authorization Form. An authorized TA is a completed Annex D signed by the TA Authority.

#### C. TA Authority and Limit

The Project Authority may authorize individual TAs, inclusive of any revisions, the sole applicable Contract basis of payment of which is Limitation of Expenditure up to a limit of \$200,000.00, Applicable Taxes extra. Any TA the total value of which would exceed that limit or any revision to a previously authorized TA that would increase the TA total value above that limit, or any revisions to any previously authorized TA the applicable Contract basis of payment of which is firm lot price must be authorized by the Contracting Authority before issuance to the Contractor.

**D.** The authority specified under paragraph C of this clause is granted subject to the sum specified in the Contract under clause 7.6.2 (Canada's Total Liability, Cumulative Total of all authorized TAs), not being exceeded.

#### E. TA Process

For each task or revision of a previously authorized task, the Project Authority will provide the Contractor with a request to perform a task prepared using Annex A – “Task Authorization Form”, containing as a minimum:

- 
- the task or revised task description of the Work required, including:
    - the details of the activities or revised activities to be performed;
    - a description of the deliverables or revised deliverables to be submitted; and
    - a schedule or revised schedule indicating completion dates for the major activities or submission dates for the deliverables, or both, as applicable;
  - the Contract security requirements applicable to the task or revised task;
  - the Contract basis (bases) of payment applicable to the task or revised task; and
  - the Contract method(s) of payment applicable to the task or revised task

**F.** Within three (3) calendar days of its receipt of the request, the Contractor must provide the Project Authority with a signed and dated response prepared and submitted using the TA form received from the Project Authority, containing as a minimum:

1. the total estimated cost proposed for performing the task or, as applicable, revised task;
2. a breakdown of that cost in accordance with Annex B;
3. and; for each resource proposed by the Contractor for the performance of the Work required who is not identified under the Specific Person (s) clause of the Contract :

the name of the proposed resource;  
the resume of the proposed resource; and  
a demonstration that the proposed resource meets :

- i. the Contract security requirements;
- ii. The minimum qualifications of personnel categories as specified in Annex A Statement of Work, section 8.0.

**G.** TA Authorization

1. The TA Authority will authorize the TA based on:
  - the request submitted to the Contractor pursuant to paragraph F of this clause;
  - the Contractor's response received, submitted pursuant to paragraph G of this clause; and
  - the agreed total estimated cost for performing the task or, as applicable, revised task.
2. The TA Authority will authorize the TA provided each resource proposed by the Contractor for the performance of the Work required meets all the requirements specified under paragraph G.3 of this clause.
3. The authorized TA will be issued to the Contractor by email (as an email attachment in PDF format).
4. The Contractor shall deploy specified resources to provide the required services within 36 hours of having received a signed Task Authorization.

**I.** Minimum Work Guarantee - All the Work - Authorized TAs

1. "Maximum Contract Value" means the sum specified in Contract clause 7.6.2 (Canada's Total Liability, Cumulative Total of all authorized TAs); and "Minimum Contract Value" means 5% of the Maximum Contract Value.
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

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paragraph I.3 of this clause. In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract period to perform the Work. Canada's maximum liability for Work requested in authorized TAs, performed by the Contractor and accepted by Canada 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 cost of the Work requested in authorized TAs, performed by the Contractor and accepted by Canada.

4. Canada will have no obligation to the Contractor under this clause if Canada terminates the Contract in whole or in part for default.

#### J. Periodic Usage Reports - Contracts with TAs

1. The Contractor must compile and maintain detailed and current data on its performance of Work required and requested under TAs (inclusive of any revisions) authorized and issued under the Contract.

2. No later than 15 calendar days after the end of each of the reporting periods below, the Contractor must submit to the Contracting Authority and Project Authority a periodic usage report containing, in an electronic spreadsheet (such as MSOffice Excel), the data elements specified in paragraphs J.3 and J.4 of this clause in the order they are presented. Where at the end of a reporting period, no changes are required to be made to the data contained in the periodic usage report submitted for the previous period, the Contractor must submit a "NIL" report to the Contracting Authority and Project Authority.

The reporting 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.

A sample MSOffice spreadsheet containing the data elements contained in paragraphs J.3 and J.4 of this clause is provided in Annex E.

3. For each TA authorized and issued under the Contract, the data must contain the following data elements in the order presented:

- the TA number appearing on the TA form;
- the date the task was authorized appearing on the TA form;
- the total estimated cost of the task (Applicable Taxes extra) before any revisions appearing on the TA form;
- the total amount paid, Applicable Taxes included; and
- the invoice number.

4. For all TAs authorized and issued under the Contract, the data must contain the following data elements in the order presented:

- the sum (Applicable Taxes extra) specified in clause 7.6.2, Canada's Total Liability, Cumulative Total of all Authorized TAs, as last amended;
- the total invoiced amount for all authorized tasks and reimbursable expenses, inclusive of any revisions, GST/HST extra; and

- the GST/HST total amount invoiced for all authorized tasks and reimbursable expenses inclusive of any revisions.

## 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) (<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

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

### 7.2.3 Specific Person(s)

The Contractor must provide the services of the following person(s) to perform the Work as stated in the Contract:

Account Manager:

## 7.3 Security Requirement

The following security requirement (SRCL and related clauses provided by the [Industrial Security Program \(ISP\)](#) apply and form part of the Contract:

1. The Contractor must, at all times during the performance of the Contract, 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 personnel requiring access to **PROTECTED** information, assets or sensitive work site(s) must EACH hold a valid **RELIABILITY STATUS**, granted or approved by CISD/**PWGSC**.

Until the security screening of the Contractor personnel required by this Contract has been completed satisfactorily by CISD/**PWGSC**, the Contractor/ personnel **MAY NOT HAVE ACCESS** to **PROTECTED** information or assets, and **MAY NOT ENTER** sites where such information or assets are kept, without an escort.

3. The Contractor **MUST NOT** remove any **PROTECTED** information or assets from the identified work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restriction.
4. Subcontracts which contain security requirements are **NOT** to be awarded without the prior written permission of CISD/**PWGSC**.
5. The Contractor **must** comply with the provisions of the:
  - (a) Security Requirements Check List and security guide (if applicable), attached at Annex C;

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(b) Industrial Security Manual (Latest Edition).

## **7.4 Term of Contract**

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

The period of the Contract is from date of Contract to \_\_\_\_ 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 (2) additional one (1) 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 30 calendar days before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

### **7.4.3 Option to Extend - Transition Period**

The Contractor acknowledges that the nature of the services provided under the Contract requires continuity and that a transition period may be required at the end of the Contract. The Contractor agrees that Canada may, at its discretion, extend the Contract by a period of up to 90 days under the same conditions to ensure the required transition. 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.

The Contracting Authority will advise the Contractor of the extension by sending a written notice to the Contractor at least 30 calendar days before the contract expiry date. The extension will be evidenced for administrative purposes only, through a contract amendment.

### **7.4.4 Comprehensive Land Claims Agreements (CLCAs)**

The Contract 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 processed individually.

## **7.5 Authorities**

### **7.5.1 Contracting Authority**

The Contracting Authority for the Contract is:  
Name: Marc-André Leblanc  
Title: Supply Officer  
Public Works and Government Services Canada  
Acquisitions Branch  
Directorate: Professional Services Procurement Directorate  
Address: 11 Laurier Street  
PDP III, 10C1  
Gatineau, Québec  
K1A 0S5

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Telephone: 873-469-3914  
Facsimile: 873-469-3914  
E-mail address: Marc-Andre.LebLANC@tpsgc-pwgsc.gc.ca

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

### **7.5.2 Project Authority**

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

### **7.5.3 Contractor's Representative**

## **7.6 Payment**

### **7.6.1 Basis of Payment**

#### **7.6.1.1 Authorized TA**

##### **7.6.1.1.1 Firm Lot Price TA**

When the applicable basis of payment specified in a TA authorized and issued under the Contract is firm lot price, in consideration of the Contractor satisfactorily completing all of its obligations under the authorized TA, the Contractor will be paid the firm lot price stipulated in the authorized TA, as determined in accordance with the basis of payment cost elements in Annex B. Customs duties are included, and Applicable Taxes are extra.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work specified in the authorized TA, unless they have been authorized, in writing, by the Contracting Authority before their incorporation into the Work specified in the authorized TA.

##### **7.6.1.1.2 TA subject to a Limitation of Expenditure**

When the basis of payment specified in a TA authorized and issued under the Contract is limitation of expenditure, the Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work specified in the authorized TA, as determined in accordance with the basis of payment cost elements, in Annex B, to the limitation of expenditure specified in the authorized TA.

Canada's total liability to the Contractor under the authorized TA must not exceed the limitation of expenditure specified in the authorized TA. Customs duties are included 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 specified in the authorized TA will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been authorized, in writing, by the TA Authority before their incorporation into the Work specified in the authorized TA. The Contractor must not perform any work or provide any service that would result in Canada's total

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liability being exceeded before obtaining the written authorization of the TA Authority. The Contractor must notify the TA Authority in writing as to the adequacy of this sum:

- (a) when it is 75 percent committed, or
- (b) four (4) months before the final delivery date specified in the authorized TA, or
- (c) as soon as the Contractor considers that the authorized TA funds are inadequate for the completion of the Work specified in the authorized TA,

whichever comes first.

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

### **7.6.2 Canada's Total Liability**

#### **Cumulative Total of all authorized TAs**

- A. Canada's total liability to the Contractor under the Contract for all authorized TAs, inclusive of any revisions, must not exceed the sum of \$ \_\_\_\_\_. Customs duties are included and the Applicable Taxes are extra.
- B. 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.
- C. The Contractor must notify the Contracting Authority, in writing, as to the adequacy of this sum:
  - 1. when it is 75 percent committed, or
  - 2. four (4) months before the Contract expiry date, or
  - 3. as soon as the Contractor considers that the sum is inadequate for the completion of the Work required and requested in all authorized TAs, inclusive of any revisions, the applicable basis of payment of which is limitation of expenditure 7.6.1.1.2 TA subject to a Limitation of Expenditure, whichever comes first.
- D. 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.

### **7.6.3 Methods of Payment – Authorized TA**

One, several or all of the following methods of payment will form part of the authorized TA

For the Work specified in an authorized firm lot price TA:

#### Single Payment

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

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Client Ref. No. - N° de réf. du client  
08349-160412

Amd. No. - N° de la modif.  
File No. - N° du dossier  
524ZF.08349-160412

Buyer ID - Id de l'acheteur  
524ZF  
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- 
- 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.

For the Work specified in an authorized TA subject to a limitation of expenditures:

#### Monthly Payments

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

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

#### **7.6.4 SACC Manual Clauses**

A9117C (2007-11-30), T1204 - Direct Request by Customer Department  
C0305C (2014-06-26), Cost Submission – Limitation of Expenditure or Ceiling Price

#### **7.6.5 Electronic Payment of Invoices - Contract**

The Contractor accepts to be paid using any of the following Electronic Payment Instrument(s):

- a. Direct Deposit (Domestic and International);
- b. Electronic Data Interchange (EDI);
- c. Wire Transfer (International Only);
- d. Large Value Transfer System (LVTS) (Over \$25M)

#### **7.6.6 Discretionary Audit**

C0705C (2010-01-11) Discretionary Audit

### **7.7 Invoicing Instructions**

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

Each invoice must be supported by:

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

(d) a copy of the monthly progress report.

7.7.2 Invoices must be distributed as follows:

(a) The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.

## 7.8 Certifications and Additional Information

### 7.8.1 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.

### 7.8.2 Federal Contractors Program for Employment Equity - Default by the Contractor

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC)-Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the "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/humanrights/employmentequity/federalcontractorprogram.page?ga=1.229006812.1158694905.1413548969#afed) (<http://www.esdc.gc.ca/en/jobs/workplace/humanrights/employmentequity/federalcontractorprogram.page?ga=1.229006812.1158694905.1413548969#afed>). The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

## 7.9 Applicable Laws

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

### 7.10 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 4007 (2010-08-16), Canada to Own Intellectual Property Rights in Foreground Information;
- (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) Annex C, Security Requirements Check List;
- (g) the signed Task Authorizations (including all of its annexes, if any); and
- (h) the Contractor's bid dated \_\_\_\_\_, as clarified on \_\_\_\_\_ and, as amended on \_\_\_\_\_.

### 7.11 Foreign Nationals

7.11.1 SACC Manual clause A2001C (2006-06-16), Foreign Nationals (Foreign Contractor)

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

**7.12 Insurance**

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

**7.13 Liquidated Damages**

7.13.1 If the Contractor fails to perform the services within the time specified in the Contract, the Contractor agrees to pay to Canada liquidated damages in the amount of 70% of the cost of the event that was delayed, as outlined in a Task Authorization. The total amount of the liquidated damages must not exceed the amount of the submitted invoice.

7.13.2. Canada and the Contractor agree that the amount stated above is their best pre-estimate of the loss to Canada in the event of such a failure, and that it is not intended to be, nor is it to be interpreted as, a penalty.

7.13.3. Canada will have the right to hold back, drawback, deduct or set off from and against the amounts of any monies owing at any time by Canada to the Contractor, any liquidated damages owing and unpaid under this section.

7.13.4. Nothing in this section must be interpreted as limiting the rights and remedies, which Canada may otherwise have under the Contract.

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## ANNEX A, STATEMENT OF WORK

### 1.0 BACKGROUND

The Centre for Intercultural Learning (CFSC) of the Canadian Foreign Service Institute (CFSI) of Global Affairs Canada (GAC) provides intercultural learning services and products in order to improve performance in support of Global Affairs Canada (GAC), the Department of National Defence (DND), and other government departments.

CFSC serves as a centre for professional training, research and information services in international effectiveness for federal and provincial/territorial government departments and agencies, and other Canadian organizations involved in international relations, by providing a common base of skills and knowledge in intercultural performance.

In order to support the fulfillment of these services, CFSC has a requirement to engage the services of a qualified Contractor to provide a variety of intercultural learning program coordination, facilitation and support services.

### 1.1 Cost Recovery

CFSI has been granted cost recovery status by Treasury Board. This means that CFSI and its component Centres, including CFSC, are authorized to recover the cost of providing services to other government departments, other levels of government, para-public agencies, and the for-profit and not-for-profit private sectors.

Under the cost recovery authority, CFSC is required to recover all costs associated with the delivery of a service. CFSC is otherwise governed by all financial rules and regulations applicable to a federal government department, including a zero-balanced year-end.

### 1.2 Client Agreements

CFSC provides a range of services to GAC and Other Government Departments (OGDs). These services are currently provided to federal and provincial government departments, institutions, associations, small, medium and large private-sector companies, non-governmental organizations and individuals.

### 1.3 Learning Events

CFSC delivers standardized products and services to support learning and performance improvement for CFSC clients participating in regular CFSC programs, and customized products and services for other CFSC clients. The present range of products and services has been developed in response to the needs of CFSC's current client community, and continues to evolve to ensure that new clients and changing needs are met with an appropriate range of balanced solutions.

Events are led by facilitators who, through a combination of education, work experience and life experience are experts in the field of intercultural effectiveness. Many events also require the utilization of country resource personnel and/or subject matter experts who are critical to CFSC clients' understanding of the specific intercultural context within which they will be living and working. Country resource personnel include country nationals, returnees from countries and country specialists. Other subject matter experts may from time-to-time be used to address specific sector or content areas required to address a client's needs (e.g. security, health, environment, results-based management, gender based analysis, leadership, conflict management, counter-insurgency, etc.).

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CFSC also delivers customized courses, workshops, seminars or presentations for large groups. The average number of participants for a large event is between 40 and 200; however, in very exceptional circumstances, the total number of participants may be as high as 500 participants per event.

#### **1.4 Specialized Learning Events and Events Delivered Outside Canada (International Events)**

Specialized and International learning events consist of customized courses, workshops and organizational development activities that strengthen the effectiveness of client projects and programs by engaging participants in discussions that enable a shared understanding of key issues and the shared commitment necessary for effective intercultural and international collaboration. They include stakeholder exchange and rapid appraisal workshops; project and/or program workshops (anytime during a project life cycle), lessons learned workshops, and retreats for project and/or program teams, and facilitation training, coaching and capacity building. The present range of international learning products and services has been developed in response to the needs of CFSC's current client community, and continues to evolve to ensure that new CFSC clients and changing needs are met with an appropriate range of balanced solutions.

The average number of participants per international learning event is 20; however, in very exceptional circumstances, the total number of participants may be as high as 200 per event.

#### **2.0 OBJECTIVE**

As one of Canada's top-rated provider of training programs, customized workshops, project and program consulting, and research in the area of intercultural effectiveness for international programs, CFSC requires the services of a qualified Contractor capable of providing services in six (6) main areas as defined in detail herein. These six (6) areas of work may broadly be described as:

##### Learning Event Coordination and Administration:

Includes liaising with CFSC personnel; scheduling events; reserving facilities, including necessary equipment for program delivery; compiling needs assessment data; registering participants; making travel and accommodation arrangements for traveling participants; sourcing and scheduling facilitators, country resource personnel and subject matter experts; preparing learning materials; arranging catering and hospitality; tracking and reimbursement of expenses incurred by event participants, facilitators, country resource personnel and subject matter experts; and compiling event evaluation data.

##### Learning Event Delivery and Facilitation:

Includes liaising with CFSC personnel; reviewing the learning needs assessment; reviewing learning event objectives and content prior to delivery; liaising with country resource personnel and subject matter experts; delivery of the event in keeping with CFSC standards; providing post-event evaluation reports; and following up with the CFSC Project Authority or his/her delegated representative.

#### **3. Provision of Country Resource Personnel and Subject Matter Experts:**

Includes the identification, sourcing, management, administration, tracking and evaluation of country resource personnel and subject matter experts (with expertise in specific geographic regions and/or professional sectors such as international development, diplomacy, defence, international trade, gender, etc.) to contribute to the delivery of learning events.

#### **4. Learning Event Design and Development:**

Includes conducting needs analyses; designing learning events based on the needs analysis and the advice and feedback of the CFSC Project Authority or his/her delegated representative; developing learning events

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based on the preliminary design and the advice and feedback of the CFSC Project Authority or his/her delegated representative; updating and/or adapting existing instructional design materials; and adhering to CFSC's instructional design methodology, quality standards, service evaluation and quality control requirements.

5. Learning Product Design and Development:

e-Learning and Multimedia Design and Development: Includes the design, development and maintenance of media-rich e-learning and assessment products or converting existing classroom and self-study material to e-learning products in both web based and other electronic formats.

Web Design, Development and Management: Includes the design, development and maintenance of websites, micro-sites, electronic magazines and/or newsletters, online assessment tools, and electronic communication products in support of CFSC learning events and products.

Media Production: Includes the provision of video production services (recording, editing and exhibiting visual and audio information in digital format) as standalone learning programs/products or as components to be integrated into other electronic products. Also includes the production of motion graphics or similar as standalone programs/products or as components to be integrated into other electronic products.

Database Design and Development: Includes the provision of database design, development, administration and maintenance services for applications in support of learning coordination/administration, learning resources (including LMS or similar) and learning assessment and evaluation tools.

Print Document Design and Development: Includes the provision of document design and development services for print documents, including editing, graphic design and layout. Products include participant's manuals for learning events and Country Information Packages on all UN-recognized countries, in both official languages.

6. Research and Strategic Advisory Services related to Learning:

Includes liaising with CFSC personnel; performing high-level needs analyses and providing strategic advice and solutions related to all aspects of intercultural learning; research of best practices and new approaches and technologies for learning; assisting CFSC staff on research projects in the area of intercultural effectiveness, including geographic regions or professional sectors, design of survey instruments, and qualitative and quantitative data collection and analysis.

7. Related Services and Resources

Includes the provision of other resources and services such as securing classrooms on an as required and as needed basis as well as other resources and services to support learning activities, Specifications for these resources are generally defined in the Statement of Work and will be further refined by the Contractor and outlined in a Task Authorization Form.

Specific Task Authorizations will be issued as project requirements are identified by CFSC, which will detail project-specific statements of work, deliverables, dates, personnel categories, the expected level of effort, and the language of work required for activities outlined in the Task Authorization form.

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### **3.0 SCOPE OF WORK**

#### **3.1 Learning Event Coordination and Administration**

The Contractor must, as-and-when-requested, provide the services of qualified learning event coordinators and document production specialists to provide learning event coordination and administration services including the following:

- a) Maintain a current, accurate and comprehensive electronic record for each learning event including but not limited to: event title and number, CFSC client, start and end dates, duration, number of participants (including the number of traveling participants), gender of participants (if required), facilitator(s), country resource personnel, subject matter expert(s), language of delivery, location of delivery, logistical data, and financial data;
- b) Maintain a current, accurate and comprehensive electronic database of qualified facilitators, country resource personnel, and subject matter experts (CFSC is to have full access to this database at all times at no additional charge);
- c) Coordinate and administer each learning event by carrying out the following activities:

Assess the requirements outlined in the Task Authorization Form;

Determine the appropriate location for the event in accordance with criteria established or deemed acceptable by the CFSC Project Authority or his/her delegated representative and, where required, select and contract for third-party facilities, catering, and audio-visual requirements (all catering services must comply with the Treasury Board Hospitality Policy and be approved in advance by the appropriate CFSC authority);

In consultation with and subject to prior agreement by the CFSC Project Authority or his/her delegated representative, select and assign facilitators, country resource personnel and/or subject matter experts to events;

Where required, make travel and accommodation arrangements for facilitators, participants, country resource personnel and/or subject matter experts in accordance with Treasury Board policies and CFSC directives;

Register event participants, obtain and record participant information, provide participant information to CFSC and the event facilitator, and respond to participant questions regarding registration and the learning event (the nature of registration varies depending on the CFSC client);

Collect participant learning needs assessment information using forms provided by the CFSC Project Authority or his/her delegated representative, if required;

Arrange and ensure the set-up of the training facility, including audio visual equipment, and on-site logistics;

Produce event materials (print, collate, bind and label) for participants, facilitators, country resource personnel and subject matter experts, and ensure that print documents are prepared and delivered according to CFSC norms and deadlines specified in the Task Authorization;

Coordinate and ensure the timely provision of all post-event reports required by CFSC, including facilitator reports, participant evaluations (compiled if required), coordination and follow-up reports, and financial reports;

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Review expense reports and claims for traveling participants, facilitators, country resource personnel and subject matter experts for accuracy and administer them in accordance with Treasury Board policies and CFSC directives (this includes but is not limited to: providing expense claim forms, gathering expense claims, reimbursing expenses based on verified expense claims, reporting verified participant expense claims to CFSC and providing a separate invoice to CFSC for the reimbursement of participant expense claims); and

Within one week of completion of the delivery of a learning event, update the database of qualified resources by recording country resource personnel and subject matter experts used and their performance, based on CFSC-supplied event evaluations and facilitator assessments.

d) Prepare and provide, in a timely manner as specified by CFSC, all forecasts and reports required by CFSC concerning CFSC client contacts and relations, coordination of events and services, and expenditures;

e) Adhere to the service evaluation and quality control requirements established by CFSC or specified in the Task Authorization, and ensure that all of its resources adhere to CFSC's service standard and quality monitoring activities; and

f) Ensure that all services provided to Government of Canada employees conform to Treasury Board and GAC policies and directives, including those related to travel, accommodation and allowances, and hospitality for both third-party learners and government employees (see links in Section 13.0 of this SoW under Treasury Board Homepage);

g) Maintain at all times current knowledge of CFSC's products and services and CFSC's clients' mandates, business lines, and service and program delivery mechanisms; and

h) Perform other related learning event coordination and administration services, as specified in a Task Authorization Form.

### **3.2 Learning Event Delivery and Facilitation**

The Contractor must, as and when requested, for each learning event, provide the services of qualified facilitators to provide learning event delivery and facilitation services including the following:

a) Liaise with the CFSC Project Authority or his/her delegated representative regarding any event-specific requirements;

b) Review the learning needs assessment, if applicable;

c) Review the lesson plan and content to ensure a ready familiarity during delivery;

d) Arrive at the event site at least forty five (45) minutes prior to the scheduled start time to set up the room, verify the correct functioning of technical equipment and greet participants;

e) Distribute learning materials to each participant, if applicable;

f) Distribute attendance list(s) to participants for their signature, if applicable;

g) Provide administrative briefing to participants at the beginning of the learning event outlining the location of fire exits, washrooms, lunchroom and other relevant administrative issues;

h) Create an environment that is conducive to adult learning by respecting the following principles:

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The adult is an active learner as opposed to a passive observer;  
The adult has immediate objectives and needs to apply the learning after the session,  
The adult learns easily when he/she is aware of the content to learn and the methods that will be used;  
The adult learns best when the learning relates to his/her life, and takes into account their past experience;  
The adult is registered to a training activity in order to solve a problem or find possible solutions to different issues;  
The adult is unique from other learners because of his/her personal and professional experiences; and  
The adult, when registering to a learning activity, is motivated by a goal, an objective, the activity and the anticipated learning.

- i) Facilitate transitions between items on the agenda, invite participants to ask questions and provide feedback, provide problem resolution, summarization of main points and conclusion;
- j) Ask probing questions, stimulate reflection, question assumptions and explore options;
- k) Ensure there is interaction between the facilitator and participants and between participants;
- l) Adjust answers to type of audience;
- m) Keep a list of unanswered questions throughout the learning event, find answers during or after the learning event by asking them to subject matter experts and communicate answers to participants;
- n) Make connections between seemingly disparate fields of study and knowledge and the participants' work reality;
- o) Emphasize 'real-world' problems, approaches and solutions over academic theory, i.e. engage the audience and use practical examples that relate to the audience's work environment and experience that will be useful and applicable to the participants when back on the job;
- p) Maintain a pace that ensures that the audience is able to follow and understand the material, while staying on schedule;
- q) Ensure that the participation and contribution of country resource personnel and/or subject matter experts to the learning event, if applicable, is appropriate to the learning needs specified in the learning design;
- r) Ensure that the delivery of all learning events adheres to standards established by CFSC or specified in the Task Authorization (CFSC follows the standards of the St. Francis of Xavier Diploma in Adult Education for event delivery and evaluation, and the Kirkpatrick model for training evaluation);
- s) Report immediately to the CFSC Project Authority or his/her delegated representative any problems with a participant or client relations;
- t) Distribute learning event evaluation forms, if applicable, to participants and gather them at the end of the event and provide copies of the evaluation to CFSC Project Authority or his/her delegated representative;
- u) Provide the participants with course certificates, if applicable, upon completion of the learning event;
- v) Be available for up to thirty (30) minutes at the end of the day to answer questions from participants;
- w) Submit the learning event evaluations, if applicable, to the CFSC Project Authority or his/her delegated representative within ten (10) calendar days of event delivery;

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- x) Submit the signed attendance lists, if applicable, to the CFSC Project Authority or his/her delegated representative within ten (10) calendar days of event delivery; and
  - y) Inform the CFSC Project Authority or his/her delegated representative of any challenges, issues and lessons learned from each learning event via the 48-hour Report within 48 hours of event delivery; and
  - z) Perform other related learning event delivery and facilitation services, as specified in a Task Authorization Form.

### **3.3 Provision of Country Resource Personnel and Subject Matter Experts**

The Contractor must, as and when requested, provide the services of qualified country resource personnel and subject matter experts to augment the delivery of learning events by providing services that include the following:

- a) Maintain a current, accurate and comprehensive electronic database of qualified country resource personnel, and subject matter experts with recent and relevant experience;
- b) Liaise with the CFSC Project Authority or his/her delegated representative and facilitator regarding any event-specific requirements and resource qualifications;
- c) Present the CFSC Project Authority or his/her delegated representative with a list of country resource personnel and/or subject matter experts and their respective curriculum vitae, detailing their relative experience and qualifications for review and approval;
- d) Provide the services of country resource personnel and/or subject matter experts to augment the delivery of learning events by performing the following tasks:

Familiarize themselves with the objectives of the learning event and the participants' needs, and

Provide country-specific and/or subject-specific information to participants appropriate to the needs of the participants; and

- e) Perform other related services, as specified in a Task Authorization Form.

Country resource personnel typically contribute to learning events for a half day. These learning events tend to be small groups of 1-5 participants. The format is typically a discussion rather than a presentation. The country resource person is expected to speak about current aspects of their country of origin, including but not limited to: history; geography; government; culture and society; communications; recent events; special concerns; etc. and provide an understanding of differences in culture, society and relationships between their country of origin and Canada. Given the geographic coverage of GAC and DND, country resource personnel are required for all countries, and multiple resources for some countries of focus, such as Afghanistan, Ukraine and Syria.

Subject matter experts typically contribute to learning events for closer to a full day or more. These learning events tend to be larger groups of participants, i.e. 15-20, or as many as 250. The format is typically a presentation. In some instances, the subject matter experts are expected to provide thematic or sectoral knowledge above and beyond country-specific information; e.g. business in China, counter-insurgency in Afghanistan, gender equity in Cameroon. In other instances, the subject matter experts provide thematic or sectoral knowledge that is not necessarily specific to a particular country; e.g. results-based management, leadership in the international context.

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### 3.4 Learning Event Design and Development

The Contractor must, as-and-when-requested, design and develop learning events by carrying out the following activities:

a) Perform a learning needs analysis which may involve:

meeting with stakeholders to determine what issues the learning event should address;  
selecting an appropriate information collection methodology, e.g. one-on-one interviews, focus groups, surveys, analysis of internal and external documents, etc.;

identification and analysis of key internal and external documents and key programs, policies, processes which would provide context for any learning event;  
development of interview guides, conducting interviews with focus groups, stakeholders or experts analyzing and reporting results of interviews;  
analysis of the information collected to identify recurring themes and learning gaps, major issues and preparation of a report setting out the findings and recommendations coming out of the research and analysis;

identification of preliminary performance objectives, critical subject matter or competencies to be developed;  
creation of a detailed evaluation framework, including measures of achievement; and  
delivery of a needs analysis report that contains, but is not limited to:  
key issues and challenges and how they can be addressed through learning events;  
a recommended development strategy around which the curriculum can be built; and,  
a prioritized list of competencies, skills, knowledge, mindsets and behaviours required to successfully meet the challenges.

b) Designing a learning event based on the needs analysis report and the advice and feedback of the CFSC Project Authority or his/her delegated representative. The learning event design may include but is not limited to the following:

identification of learning objectives and enabling objectives, critical subject matter or competencies to be developed;  
description of the critical subject matter or competencies to be developed;  
description of the learning points and the methodologies/activities proposed to address the learning and enabling objectives;  
identification of electronic resources applicable to a blended learning solution;  
description of the evaluation framework including measures of achievement;  
profiling of facilitators, country resource personnel and/or subject matter experts recommended for activities;  
identification of participant materials, handouts, pre-reading requirements, etc. in hardcopy and/or electronic format as specified in the task authorization;  
determination of the day-by-day layout of the learning event and sequencing of the learning event content; and  
selection of articles and background material to assist facilitators with preparation and delivery.

c) Developing learning event materials based on the preliminary design and the advice and feedback of the CFSC Project Authority or his/her delegated representative and which may include the following:

finalizing the content of the participant and instructor manuals, handouts, pre-reading requirements;  
reviewing, creating, editing content and structuring the participant and the instructor manuals;  
creating a detailed learning event schedule; and  
collecting background material to assist facilitators with preparation and delivery.

d) Performing instructional design adjustments or content update to instructional materials for existing learning programs as a result of new legislation, participants' evaluation reports or effectiveness of the

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design. Materials may include lesson plans, exercises, participants' notes and the content of Powerpoint presentations.

- e) Adapting and adjusting existing learning event materials to suit specific client needs.
- f) Ensuring that all work produced by its resources adheres to CFSC's instructional design methodology and quality standards;
- g) Adhering to any service evaluation and quality control requirements established by CFSC or specified in the Task Authorization, and ensure that all of its resources adhere to CFSC's service standard and quality monitoring activities; and
- h) Performing other related learning event design and development services, as specified in a Task Authorization.

### **3.5 Learning Product Design and Development**

#### **3.5.1 Project Management**

The Contractor must, as-and-when-requested, provide project management services for the design and development of learning products by carrying out the following activities:

- a) Managing the design, development and maintenance of e-learning products, web products (websites, micro-sites, electronic magazines and/or electronic newsletters), database-driven applications, video and motion graphic products, print and electronic documents, and other related deliverables as identified in a Task Authorization form. These services include:

acting as the primary point of contact between CFSC and Contractor resources;  
liaising and collaborating with GAC's Information Management and Technology Bureau, as required;  
determining the project scope, including budget, deliverables; and timelines;  
validating the project scope with the appropriate CFSC authority;  
developing and updating detailed project plans;  
sourcing subject matter experts, as required;  
documenting technical requirements;  
assigning specific deliverables to resources;  
managing the design and development of deliverables;  
tracking project plans and managing resources;  
monitoring and controlling projects to ensure they remain on budget and to ensure on-time delivery and client satisfaction;  
managing risks and implementing problem resolutions;  
balancing resources and workload across various projects to optimize resource allocation;  
ensuring accurate and complete documentation provided for all deliverables (technical and any required user documentation);  
planning, organizing, and ensuring quality assurance of deliverables;  
developing, in consultation with CFSC authorities, an approach to ensure high quality translation of deliverables;  
managing accurate internal project reporting;  
managing client communications and reporting; and  
obtaining sign-offs on projects and milestones.

- b) Managing the human resource needs of the Contractor team members in relation to a Task Authorization, which includes instructional designers, writers, text editors, subject matter experts, graphic

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designers, web developers, database developers, and video production crews. Management responsibilities include:

ensuring adequate human resources to meet all Task Authorization requirements;  
managing team members; and  
managing project expenses.

c) Supporting the development, implementation and delivery of learning product related services, project and production management, instructional design, web development and management, media production, technical support for conference presentations and editing services including print document design and production services;

d) Selection and provision of subject matter experts to assist in the development of intercultural effectiveness learning support materials;

e) Providing on-going and as required assistance and direction to team members and CFSC representatives in regard to the development of e-learning, media, web, database applications, print products and other learning support services required by CFSC; and

f) Providing other related services, as specified in the Task Authorization form.

### 3.5.2 *Instructional Design – E-Learning Products*

The Contractor must, as-and-when-requested, provide instructional design services for the design and development of learning products by carrying out the following activities:

a) Project Definition:

conduct a needs analysis by assessing business/learning requirements;  
validate learning outcomes with CFSC or CFSC clients;  
interview project stakeholders;  
assess technical and learning requirements;  
analyze the current state of any available content;  
identify requirements which necessitate involvement from external subject matter experts;  
characterize the target audience (background, skills, knowledge); and  
elaborate on the learning needs of the target audience (i.e. goals, learning approach, product scope, and implementation context), with particular emphasis on the needs of adult learners.

b) Implement a content analysis:

review the existing content;  
identify content gaps;  
identify technical specifications for the developed solution;  
identify sources of content;  
generate content with subject matter experts;  
identify intellectual property rights that must be acquired; and  
develop a work plan to source, develop and validate the required content.

c) Generate and validate content with subject matter experts:

obtain and generate content through research, structured interviews or focus groups;  
develop examples, exercises, case studies, simulations, anecdotal materials, video and other multi-media productions, scenarios and other relevant information, as required;

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structure the content into an instructionally valid sequence; and  
validate the content as complete, comprehensive and correct.

d) Develop an instructional plan, which may include a description of the following items:

learning goals and objectives;  
implementation context;  
content scope;  
target audience;  
instructional design considerations;  
evaluation methods to measure the achievement of learning objectives by learners;  
learning event evaluation and validation;  
module structure, including learning activities; and  
sequence and courseware specifications chart.

e) Based on the instructional plan, and with input from other specialists, prepare and develop a Presentation Design Document that describes the instructional, creative and all functional requirements of the e-Learning module or other learning product to be developed.

f) Develop scripted storyboards:

develop instructional design scripted storyboards, which outline navigation flow, detailed interaction descriptions and graphical elements for each screen or web page;  
validate with the client and subject matter experts that the scripted storyboards meet the learning objectives and demonstrate a high level of interactivity for all learning styles including simulations, games and job aids;  
and  
review and validate the scripted storyboards with graphic designers and developers.

g) Conduct quality assurance deliverables on the e-Learning module or other assessment and learning product:

test for conformity to the Presentation Design Document's specifications, scripts and storyboards;  
test for interactivity, functionality and programming bugs;  
test for User Experience (UX)  
assure grammatical and spelling accuracy in both English and French;  
ensure consistency throughout the developed product (for example, bolded titles, lists in bulleted format and other relevant information);  
record and report faults on a frame by frame basis; and  
ensure quality assurance on subsequent re-work of the developed product.

h) Providing other related services, as required by CFSC.

### 3.5.3 Writing

The Contractor must, as-and-when-requested, provide writing services for the design and development of learning products by carrying out the following activities:

a) Conduct background research, interviews and analysis of relevant documentation and materials for the development of written materials for inclusion in electronic publications (internet or intranet), video scripts, e-learning products, print media, user guides and administrative guides;

b) Prepare draft and final versions of text on the subject matter indicated by CFSC, and submit these to the CFSC Project Authority or his/her delegated representative for review;

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- c) Undertake necessary revision and editing of the documents, according to the requirements of CFSC and the rules of the language of work;
  - d) Read and edit copy to be published to detect and correct errors in spelling, grammar and syntax, and shorten or lengthen copy as space or time requires;
  - e) Liaise with the proposed Learning Product Production Manager, Subject Matter Experts, Instructional Designers, and the CFSC Project Authority or his/her delegated representative to co-ordinate the completion of specified deliverables in a compliant and timely manner;
  - f) Prepare and produce scripts for educational media products (e.g. video, radio, web, multi-media); and
  - g) Provide other related services, as required.

#### 3.5.4 Editing (Text)

The Contractor must, as-and-when-requested, provide editing services for the design and development of learning products by carrying out the following activities:

- a) Reading, revising, recommending and/or implementing modifications in the grammar, format, syntax, spelling, and structure of all text components of e-Learning and multi-media deliverables, and all documents, including, (but not limited to) user guides, administrative guides, web content, electronic magazines publications, video scripts and learning materials;
- b) Verifying the internal coherence of the presentation and data;
- c) Identifying to the persons in charge of the graphic design and programming, all special requirements;
- d) Clarifying and/or reorganizing the format and structure of text deliverables;
- e) Participating in the update and enhancement of CFSC's database of terms and definitions;
- f) Understanding and inputting data and text;
- g) Ensuring consistency between French and English versions of learning products;
- h) Identifying and resolving issues as they arise.
- i) Provide other related services, as required.

#### 3.5.5 Graphic Design

The Contractor must, as-and-when-requested, provide graphic design services for the design and development of learning products by carrying out the following activities:

- a) Consult with CFSC Project Authority or his/her delegated representatives to establish the overall look, graphic elements and content of online and print materials in order to meet their needs.
- b) Design and develop the creative elements of the required learning or learning-support product (look and feel, relative theme, style) and validate that the design is engaging, that it meets the client requirements

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and the instructional goals of the learning product and that it conforms to established Government of Canada standards (if required).

- c) Prepare sketches/composites, layouts and graphic elements of the subjects to be rendered using digital design software and tools;
- d) Produce hard-copy, colour outputs for approvals and distribution and inventory/organize all CFSC print-related documents (learning support materials and communications materials);
- e) Identify all graphic design components, for example, graphics and photos, for which intellectual property rights must be acquired by CFSC; and
- f) Provide other related services, as required.

#### 3.5.6 Web Design and Development

The Contractor must, as-and-when-requested, provide web design and development services for the design and development of learning products by carrying out the following activities:

- a) Leading web based development projects for Internet, intranet, extranet, e-learning, Learning Management (LMS) and similar projects;
- b) Developing and preparing diagrammatic plans for web based service delivery over the internet;
- c) Creating web application models, methods, and tools that allow others to easily develop and integrate their projects into existing web contexts;
- d) Integrating Third Party Portal Solutions with custom developed modules and components;
- e) Designing and developing visual and functional specifications for Internet, intranet and extranet web sites, e-learning products and other custom applications;
- f) Developing websites, micro-sites and e-learning applications using web technologies such as ASP, PHP, HTML, XML, CSS, Java, using industry-standard software applications;
- g) Working with the proposed Learning Product Production Manager/Producer and the CFSC Project Authority or his/her delegated representative to publish information on the Internet, intranet and extranet web sites.
- h) Verifying accuracy and completeness of programs and providing Quality Assurance for implementation, integration and development for production and test environments.
- i) Providing Quality Assurance and testing services;
- j) Participating in the administration of web servers and maintenance of web sites;
- k) Monitoring the correct functioning of websites, e.g. ensure links are active and accurate; and
- l) Providing other related services, as required.

#### 3.5.7 E-Learning Designer and Developer

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The Contractor must, as-and-when-requested, provide e-learning design and development services for the design and development of asynchronous and blended learning solutions by carrying out the following activities:

- a) Leading interactive e-learning projects for web, internet, mobile or alternative media formats;
- b) Working with diagrammatic plans and/or storyboards for the production of interactive e-learning products;
- c) Creating interactive e-learning products and standalone resources or to integrate into web, intranet or similar environments (including integration/communication with SQL and MySQL database structures);
- d) Designing and developing interactive e-learning products using authoring software such as Adobe, Captivate, Articulate Storyline, Lectora and Smart Builder, HTML 5, CSS3 or JavaScript;
- e) Working with the proposed Learning Product Manager and the CFSC Project Authority or his/her delegate representative to publish information on the Internet, Intranet, standalone or similar environments;
- f) Developing or modify assets using Adobe Creative Suite, in order of priority: Photoshop, Premiere Pro, Audition, After Effects, Illustrator, Dreamweaver, Acrobat Pro, etc.;
- g) Providing Quality Assurance and testing services;
- h) Designing, implementing and evaluating content material of learning management systems (LMS) using SCORM, AICC, or xAPI (Tin Can);
- i) Providing technical support via phone and in-person communication; and
- j) Providing other related services, as required.

### 3.5.8 Database Development and Administration

The Contractor must, as-and-when-requested, provide database (Microsoft SQL Server, My SQL, Access) design and development services for the design and development of learning products by carrying out the following activities:

- a) Design and implement data conversion strategies;
- b) Controlling and coordinating change to the database, including the deletion of records, changes to the existing records, additions to the database and compliancy;
- c) Develops and implements security procedures for the database, including access and user account management;
- d) Creates and maintains data dictionaries;
- e) Provides solutions to complex database problems or to specific design constraints;
- f) Conducts performance and tuning reviews;
- g) Reviews application code and makes recommendations for enhancements;

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- h) Codes the database management systems (DBMS) access paths;
  - i) Develops technical architectures, frameworks and strategies;
  - j) Ensures the integration of all aspects of technology solutions;
  - k) Loads and unloads the data;
  - l) Monitors and tunes the DBMS;
  - m) Performs database reorganization;
  - n) Generates periodic and ad hoc reports from learning administration and learning management databases; and
  - o) Develops web applications using ASP.Net framework including testing and debugging;
  - p) Provides consulting and systems analysis and design services;
  - q) Supports and open-source Learning Management System (Moodle); and
  - o) Provides other related services, as required.

### 3.5.9 Media Production

Working under the guidance of the Learning Product Manager and Project Authority, the Contractor must, as-and-when-requested, provide media production services for the design and development of learning products by carrying out the following activities:

- a) Leading interactive multimedia projects for web, internet, and any other medium;
- b) Creating interactive multimedia projects for web, internet, and any other medium;
- c) Interview video subjects for research and production;
- d) Coordinate and plan logistics (pre-production through to post-production) of single-camera documentary-style and studio-style productions;
- e) Operate professional quality video production equipment to capture interviews, live events and other related activities;
- f) Designing and developing video, motion graphic and interactive multimedia products using applications such as Final Cut Pro, Avid, Adobe After Effects, ProTools, Garage Band, GoAnimate, Crazy Talk, Prezi, Flash Professional, Maya, Nuke;
- g) Working with the proposed Learning Product Manager and the CFSC Project Authority or his/her delegate representative to publish information on the Internet, Intranet, standalone or similar environments;
- h) Collaborate with the Learning Product Manager and the CFSC Project Authority or his/her delegate representative to edit recorded video footage;
- i) Create various formats of video, audio and motion graphic files for multiple delivery platforms;

- j) Provide Quality Assurance and testing services; and
- k) Provide other related services, as required.

### 3.5.10 IT Support

The Contractor must, as-and-when-requested, provide technical support services for laptops, tablets and similar devices (non-Signet) used in support of training and delivery environments by carrying out the following activities:

#### Personal Computer Environments:

- a) Update and configure workstations, laptops, tablets and servers to function on non-Signet networks;
- b) Install hardware, software and device drivers on standalone and non-Signet networked computers;
- c) Install and configure computer networks including LAN and WAN;
- d) Manage network configurations to ensure that all computers on a network can communicate effectively;
- e) Upgrade software, patches and operating systems on a continuous basis;
- f) Install and configure monitors, keyboards and printers;
- g) Troubleshoot hardware and software problems;
- h) Act as a technical resource in order to assist users with resolving computer issues;
- i) Answer tickets and emails pertaining to users' computer problems;
- j) Ensure that all computers are secured effectively by installing and updating antivirus software;
- k) Set up and organize IPs appropriately;
- l) Train users on new software;
- m) Analyze network problems and manage preventative maintenance procedures;
- n) Explain the role of network applications and equipment to the end users;
- o) Maintain documentation of technical maintenance procedures carried out; and
- k) Provide other related services, as required.

#### Tablets and Mobile Environments:

- a) Set up, maintain, deploy and train employees in the use of multimedia and computer devices (e.g. iPad);
- b) Develop web-based environment for mobile learning;

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- c) Coordinate all phases of tablet set-up for training environment including: technical input to the planning and scheduling of activities for the maintenance of the LAN/WAN; researching hardware-software solutions for multimedia learning lab;
  - d) Assist trainers in the deployment of tablets;
  - e) Provide basic troubleshooting support; and
  - f) Provide other related services, as required.

### **3.6 Research and Strategic Advisory Services related to Learning**

The Contractor must, as-and-when-requested, provide researchers and strategic analysts to support CFSC research and development projects. CFSC may require resources at the senior, intermediate and/or support levels depending upon the nature of the requirement described in the Task Authorization. Resources may be internal to the Contractor or sourced externally depending upon the nature of the requirement. The resources may be requested to carry out the following activities:

#### *3.6.1 Senior Level Researchers may be requested to carry out the following activities:*

- a) Monitoring developments in intercultural learning, adult education and learning technology and providing recommended direction to support existing and evolving CFSC learning programs;
- b) Determining what instructional approaches, technology and tools are available, ready and useful, and that meet learner needs and performance objectives;
- c) Conducting business needs analysis, strategic and business planning analysis, visioning exercises, gathering and consolidating needs assessments and environmental scans in support of CFSC learning programs;
- d) Analyzing existing capabilities and requirements, developing redesigned research frameworks and recommending areas for improved capability;
- e) Developing standards and processes;
- f) Designing change management, marketing, implementation and evaluation strategies for introduction of new learning approaches and/or technologies;
- g) Developing learning product and services management and administration strategies;
- h) Performing market and/or vendor analysis;
- i) Developing metrics and conducting benchmarking;
- j) Planning change management, marketing and communication initiatives;
- k) Conducting analyses to develop the following deliverables, which include but are not limited to the following:

needs assessments,  
capability assessments,  
technology assessments,

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market scans and vendor analysis,  
strategic plans,  
business plans,  
business cases,  
implementation plans (including schedule and resource budget),  
management plans,  
marketing plans,  
requirements definition documents,  
standards and processes documents,  
pilot testing strategies and evaluations,  
readiness reports,  
articles ready for journal publication, and  
briefings or presentations.

l) Perform other related research and strategic advisory services, as specified in a Task Authorization.

*3.6.2 Intermediate Level Researchers may be requested to carry out the following activities:*

- a) Implementation of research frameworks;
- b) Instrumentation development (surveys, interview structures);
- c) Data collection (interviews, focus groups, surveys) and data sorting;
- d) Needs assessments and environmental scans; and
- e) Perform other related research and strategic advisory services, as specified in a Task Authorization

*3.6.3 Support Level Researchers may be requested to carry out the following activities:*

- a) Data entry into various types of software;
- b) Internet research to support the research requirements of Senior and Intermediate Researchers;
- c) Support for communications with research cohorts or target groups; and
- d) Perform other related research and strategic advisory services, as specified in a Task Authorization

### **3.7 Related Resources and Services**

The Contractor must as-and-when- requested provide other resources and services to support learning activities, including securing classrooms. The classroom/facility specifications must meet the following requirements and may be further refined by the Project Authority and outlined in a Task Authorization Form.

#### Location of Classroom Facility

Classroom facilities must be located in the National Capital Region at a location that is acceptable to the Project Authority to meet their requirements.

- b) Facility must be near a city bus stop/terminal

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Classroom specifications and requirements:

- a) Dimensions must be conducive to learning and appropriate for the number of participants in the class (Class size may range from one to six);
- b) Classrooms must have appropriate heating, ventilation, air conditioning and lighting and electricity;
- c) Each room has to be equipped in such way that it facilitates small group learning;
- d) Furniture to be provided by the supplier (desks, chairs, dry erase boards)

3.7.3 The Overall training space requires:

- a) Facilitators and participants must have access to a phone, internet and photocopier;
- b) Adequate security provisions in accordance with the Security Requirements Checklist provided in Annex C;

3.7.4 The Common area(s) should have the following:

A common area is required with a phone line, and appropriate furnishings

Kitchenette area with fridge, microwave, sink, coffee machine, and a water cooler;

A reception area with training coordinator services during business hours;

Access to washroom facilities.

#### **4.0 DELIVERABLES**

The Contractor must provide all deliverables listed in each Task Authorization, including, but not limited to, the following:

4.1 Participant Event Evaluation Reports, using the "Course Evaluation Form" attached as Annex "F", and forming part of the Contract to evaluate the event content, materials and performance of the individual facilitators, country resource personnel and/or subject matter experts at meeting the objectives from the participants' perspective. The Event Evaluation forms are provided by CFSC to the Contractor to be distributed to and gathered from event participants. Event evaluation reports are to be delivered by the Contractor to the CFSC Project Authority or his/her delegated representative responsible for the event delivery within ten (10) days of the event delivery. Requirements for the Contractor to collate evaluation reports will be identified in Task Authorization forms.

4.2 Facilitator Event Evaluation Reports, using the "48-Hour Report Form" attached as Annex "E", and forming part of the Contract to evaluate the event content, materials and performance of the individual facilitators, country resource personnel and/or subject matter experts at meeting the objectives from the event facilitator's perspective as they are defined within each Task Authorization. These are to be provided to the CFSC Project Authority or his/her delegated representative in charge of the event delivery within forty eight (48) hours of the event delivery.

4.3 Financial Reports, using the "Participant and Expense Report" spreadsheet which will be made available upon Contract award. This report is to be submitted to the Project Authority on a monthly basis.

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4.4 Additional reports on other matters relevant at the discretion of the Project Authority to the management and administration of the work specified within each Task Authorization.

## 5.0 CONTRACTOR RESPONSIBILITIES

In addition to the services detailed in Section 3.0 – Scope of Work herein and to the timely submission of all deliverables detailed in Section 4.0 - Deliverables and as specified in each Task Authorization, the Contractor must:

5.1 Declare any matter that could compromise or appear to compromise the objectivity of either the resource or CFSC before embarking on an Event Delivery, Implementation and Related Research and Development Services project or at any point during the Task Authorization.

5.2 Confer with the CFSC Project Authority regularly on issues related to confidentiality, privacy, communications and ownership of findings and reports.

5.3 Manage the delivery of services to CFSC in accordance with all service models that may be provided to the Contractor by CFSC. The Contractor is advised that because the services are delivered to federal public servants, certain restrictions or limitations or structures of the services (i.e. service models) may apply to various aspects of the services delivered to the public servants. CFSC, through this Contract, may impose such service models on the delivery aspects of the Contract. An example is the meal allowance for public servants while on business travel. These service models are borne from various Acts, Codes, Departmental and/or federal government regulations, codes and policies and the Project Authority will detail such to the Contractor as and when they apply. The Contractor may refer to the following websites for general information: [http://www.tbs-sct.gc.ca/index\\_e.asp](http://www.tbs-sct.gc.ca/index_e.asp), <http://www.international.gc.ca>, <http://laws.justice.gc.ca/en/BrowseTitle> . The Contractor is reminded that when reading or following these provisions, the Contractor is not to interpret the provisions as the Contractor being the employer, nor does the following of these provisions constitute the Contractor acting as an agent of Canada.

5.4 Ensure, through the nomination of a single representative (Account Manager) of the Contractor's firm, a process that provides CFSC with access to a primary contact for all matters related to any Task Authorization and the performance of the work undertaken by the Contractor. The Contractor's designated Account Manager will be responsible for responding to Task Authorizations issued by the CFSC Project Authority and maintaining services as required within the scope of any resulting Contract. In addition, the Account Manager must:

Monitor all resource and subcontractors that are providing services/deliverables in accordance with the Task Authorizations;

Liaise with the CFSC Project Authority on all matters concerning technical aspects of the work and performance of its resources;

Manage the transition of any potential resource(s) turnover during the period of the Task Authorization; and

Ensure that meetings are held with the CFSC Project Authority or his/her delegated representative on a monthly basis to review and resolve any issues arising from the contract or the performance of the contractor. These meetings will be held at CFSC's place of work. Any related travel and accommodation expenses to the contractor to attend these meetings will be borne by the contractor.

5.5 The Contractor is responsible for ensuring the health and safety of its resources, including obtaining all recommended vaccinations, medical insurance and other health or safety considerations. The cost for ensuring the health and safety of the Contractor's resources is the Contractor's responsibility.

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5.6 CFSC may request that any of the Contractor's resources providing the services described in Section 3.0 'Scope of Work' to attend a maximum of five (5) days, including no more than one (1) weekend, of professional development activities provided by or on behalf of CFSC in each twelve (12) month period of the Contract, at the Contractor's expense. These professional development activities will be to update existing qualifications or to be accredited by CFSC for new products or services or delivery qualifications deemed necessary by CFSC. Contractor resources who do not attend mandatory professional development activities may, at CFSC's discretion, be deemed ineligible for further work related to the professional development activities. The Contractor must replace any such ineligible resource in accordance with section 8.0 - Personnel Categories and Maximum Qualifications.

## **6.0 GAC SUPPORT TO THE CONTRACTOR**

6.1 CFSC will ensure that appropriate subject matter experts from within CFSC are available to the Contractor as required to provide input, answer questions, evaluate deliverables and participate in meetings, to enable him/her to proceed on schedule with the completion of all assigned deliverables.

6.2 For the Contractor's Learning Product Manager and other resources required at GAC site, GAC will provide work stations, telephones, SIGNET-connected computers, and approved software at its Bisson facility. As required, CFSC will provide the Contractor with access to its web related infrastructure and personnel in a timely manner, to enable him/her to proceed on schedule with the completion of assigned deliverables.

6.3 For the Contractor's learning event coordination and administration resources required at GAC site, GAC will provide work stations, telephones, SIGNET-connected computers, and approved software at its Bisson facility for the coordination staff required on site.

6.4 For the Contractor resources performing document layout and production required at GAC site, GAC will provide work stations, telephones, SIGNET-connected computers, approved software, information subscriptions, printers and supplies (paper, covers, etc.) at its Bisson facility for the production of learning materials and other documents related to course design, development and delivery.

## **7.0 REPORTING AND COMMUNICATION STANDARDS**

7.1 Communication is defined as all reasonable effort to inform the CFSC Project Authority or his/her delegated representative of plans, decisions, proposed approaches, implementation, and results of work, to ensure that the Work is progressing well and in accordance with CFSC Task Authorizations. Modes of communication may include: phone calls, electronic mail, faxes, mailings, and meetings. In addition, the Contractor is to immediately notify the CFSC Project Authority or his/her delegated representative of any issues, problems, or areas of concern in relation to any work completed under the Contract, as they arise.

## **8.0 PERSONNEL CATEGORIES AND MINIMUM QUALIFICATIONS**

8.1 The Contractor must maintain a sufficient human resource complement to complete the Work detailed in multiple Task Authorizations, for the duration of the Contract.

All resources must meet the stated minimum qualifications (see Article 8.2) in order to deliver service to CFSC in accordance with the Contract. All Task Authorizations for services will be based on the listing of typical roles and /or deliverables associated with the applicable personnel category being sought. It is expected that the listing of roles and deliverables within each Task Authorization will be minimally adapted or customized by CFSC (if necessary) to address the specific needs of individual projects/requirements. However, at all times the included roles and deliverables within any given Task Authorization must be in accordance with the scope of typical roles and deliverables established for the resource categories described under 8.2 herein.. The response must include the identification of proposed resources (including current CVs

for new resources), costs, deliverables and dates for deliverables. The contractor must demonstrate through the provision of CVs that their proposed resources meet ALL specified minimum qualifications within the personnel category for which they are proposed, and any additional requirements as defined per Task Authorization.

8.2 The following resource categories and minimum qualifications, outlined in Table A-1.1 below, are required for the provision of learning program coordination, delivery and support services to CFSC. Resource categories and the number of Contractor resources required for activities outlined in the Task Authorization may vary, dependent upon the nature of the work to be performed under any resulting Task Authorization:

**Table A-1.1**

<b>Resource Category</b>	<b>Minimum Qualifications</b>
Account Manager	<p>The Account Manager must have, at a minimum, the following qualifications:</p> <p>A degree or diploma from a recognized university or post-secondary institution;</p> <p>Five (5) years demonstrated experience as a Client Relations Manager / Account Manager within the past ten (10) years;</p> <p>Three (3) assignments or projects acting as a Client Relations Manager / Account Manager, at least one (1) of which valued at over \$1,000,000 (\$CAD) in the last ten (10) years, and at least one (1) of which related to learning; and</p> <p>Fluency in either French or English.</p>
Learning Event Coordinators	<p>Learning Event Coordinators must have, at a minimum, the following qualifications:</p> <p>A degree or diploma from a recognized university or post-secondary institution;</p> <p>two (2) years demonstrated experience coordinating and administering learning events in the last five (5) years; and</p> <p>Fluency in English or French.</p>
Document Production Specialists	<p>Document Production Specialists must have, at a minimum, the following qualifications:</p> <p>Two (2) years demonstrated experience printing and producing materials similar to CFSC learning materials in the last five (5) years; and</p> <p>Fluency in either French or English.</p>

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Facilitators	<p>Facilitators must have, at a minimum, the following qualifications:</p> <p>Demonstrate either:</p> <p>A degree or diploma from a recognized university or post-secondary institution that includes at least three (3) full-time years of study relevant to international relations or adult education; OR          A degree or diploma from a recognized university or post-secondary institution and a minimum of thirty (30) days per year over the last five (5) years facilitating intercultural learning events to adults.</p> <p>Demonstrate either:</p> <p>Sixty (60) days of facilitation experience in the field of international intercultural effectiveness in the last two (2) years, OR          One hundred fifty (150) days of facilitation experience in the field of international intercultural effectiveness in the last ten (10) years, including at least seventy five (75) days during the last five (5) years;</p> <p>Six (6) months cumulative experience working in a Western environment and culture (i.e. North America, Western Europe or Australia);</p> <p>Six (6) months cumulative experience working in a non-Western environment and culture; and</p> <p>Fluency in English or French.</p>
Country Resource Personnel and Subject Matter Experts	<p>Country Resource Personnel and Subject Matter Expert qualifications may vary, and will be determined at the time of TA issuance. The Contractor will present CFSC with a list of Country Resource Personnel and Subject Matter Experts and their respective CVs, detailing their relative experience and qualifications, from which the CFSC Project Authority or his/her delegated representative will select the most appropriate candidate for the specific task.</p> <p>Country resource personnel may include country nationals, returnees from countries and country specialists, sectoral and specific content specialists, and intercultural learning specialists.</p>
CRP/SME Coordinator	<p>The CRP/SME Coordinator must have, at a minimum, the following qualifications:          A degree or diploma from a recognized university or post-secondary institution; OR          Three (3) years' demonstrated experience recruiting and managing human resources in the last ten (10) years; and</p> <p>Fluency in French and English.</p>
Instructional Designer	<p>The Instructional Designer must have, at a minimum, the following qualifications:          Demonstrate either:</p> <p>Diploma or certificate in Education, Organizational Development, Instructional Design, Technology Based Education, or Multimedia Design; OR          A degree or diploma from a recognized university or post-secondary institution and five (5) years' work experience in instructional design in the last ten (10) years;</p> <p>Designed and/or developed five (5) courses, in the past five (5) years;</p> <p>Fluency in either French or English.</p>

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<p>Learning Product Manager</p>	<p>The Learning Product Manager must have, at a minimum, the following qualifications:</p> <p>A degree or diploma from a recognized university or post-secondary institution in Audio-Visual Technology, Computer Science, Journalism, Broadcasting, Multimedia Production, or a related field;</p> <p>Five (5) years of demonstrated project management experience developing e-learning, web, multimedia, video, print or similar media products and services in the last ten (10) years;</p> <p>In the role of manager or team lead, this resource must have produced or project managed the development of:</p> <p>five (5) e-Learning products,  two (2) websites,  two (2) videos/media products,  five (5) print documentation packages;  within the past five (5) years;</p> <p>Fluency in both English and French.</p>
<p>Instructional Designer – e-Learning</p>	<p>The Instructional Designer – e-Learning must have, at a minimum, the following qualifications:</p> <p>Demonstrate either:</p> <p>Diploma or certificate in Education, Organizational Development, Instructional Design, Technology Based Education, or Multimedia Design; OR  A degree or diploma from a recognized university or post-secondary institution and five (5) years' work experience in instructional design in the last ten (10) years;</p> <p>Designed and/or developed five (5) e-Learning resources, in the past five (5) years.</p> <p>Fluency in both French and English.</p>
<p>Writer</p>	<p>The Writer must have, at a minimum, the following qualifications:</p> <p>A degree or diploma from a recognized university or post-secondary institution in Journalism, English, Sociology, Cultural Studies, Creative Writing, or related field.</p> <p>Demonstrated experience providing writing services in the production of media and print-based products including a minimum of:</p> <p>two (2) educational learning products targeting an adult audience,  one (1) e-learning or similar product, or  four (4) scripts for a video or live production;  within the past ten (10) years;</p> <p>Fluency in either French or English.</p>

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Text Editor	<p>The Text Editor must have, at a minimum, the following qualifications: Demonstrate either:</p> <p>A degree in French, English, Journalism, or Linguistics, from a recognized institution; OR five (5) years' experience providing editing services consistent with GAC's requirements described in the SoW in the last ten (10) years;</p> <p>Edited two (2) online products in the past five (5) years;</p> <p>Edited four (4) print products in the past five (5) years; and</p> <p>Fluency in either French or English.</p>
Graphic Designer	<p>The Graphic Designer must have, at a minimum, the following qualifications: Demonstrate either:</p> <p>a degree or diploma from a recognized university or post-secondary institution in visual arts with specialization in graphic design, commercial art, or graphic communications and three (3) years demonstrated experience in graphic design in the last ten (10) years; OR a college diploma in graphic arts and five (5) years demonstrated experience in graphic design in the last ten (10) years.</p> <p>Performed graphic design and development of at least twenty (20) print documents within the past two (2) years; and</p> <p>Fluency in both French and English.</p>
Web Developer/Designer	<p>The Web Developer/Designer must have, at a minimum, the following qualifications:</p> <p>A degree or diploma from a recognized university or post-secondary institution in computer science, communications or business, or completion of a college program in computer science, graphic arts web design or business.</p> <p>Five (5) years of professional experience in a web development environment in the last ten (10) years.</p> <p>Performed the programming of at least:</p> <p>one (1) e-Learning product, and two (2) websites, at least one (1) of which complies to the WCAG 2.0 standards; in the past five (5) years.</p> <p>Fluency in both French and English.</p>

<p>E-Learning Designer and Developer</p>	<p>The E-Learning Designer and Developer must have, at a minimum, the following qualifications:          A degree or diploma from a recognized university or post-secondary institution in computer science, communications or business, or completion of a college program in computer science, journalism, broadcasting, graphic arts web design or business;</p> <p>Five (5) years of professional experience in an IT environment in the last ten (10) years;</p> <p>Performed the programming of at least:          Five (5) interactive e-learning resources (synchronous or asynchronous);          in the past five (5) years;</p> <p>Fluency in both French and English.</p>
<p>Database Developer and Administrator</p>	<p>The Database Developer/Administrator must have, at a minimum, the following qualifications:          A degree or diploma from a recognized university or post-secondary institution in Computer Science, Systems Engineering or related field, from a recognized academic institution;</p> <p>Five (5) years professional work experience as a Database Developer in the last ten (10) years;</p> <p>Led the development of:          one (1) database-driven information portal;          one (1) database-driven internet online registration application;          one (1) database-driven assessment tool; and          one (1) e-learning application requiring tracking and reporting;          in the past five (5) years; and</p> <p>Fluency in either French or English.</p>
<p>Media Producer</p>	<p>The Media Producer must have, at a minimum, the following qualifications:          A degree or diploma from a recognized university or post-secondary institution;</p> <p>Provided videography services for four (4) educational, instructional or documentary projects in the past ten (10) years;</p> <p>Provided videography services for one (1) educational, instructional or documentary project targeting intercultural effectiveness or similar content;</p> <p>Provided video editing services for standalone learning products or for media products to be integrated into learning resources;</p> <p>Provided motion graphic and similar services;</p> <p>Provided audio recording and editing services; and</p> <p>Fluency in French and English.</p>

IT Support Specialist	<p>The IT Support Specialist must have, at a minimum, the following qualifications:          A degree or diploma from a recognized university or post-secondary institution OR a combination of relevant education and experience in computer technology support;</p> <p>Performed a minimum of two (2) years IT support for both PC and mobile platforms in the past five (5) years;</p> <p>Provided network administration and support services for LAN/WAN; and</p> <p>Fluency in French or English.</p>
Researcher / Strategic Analyst	<p>The Senior Researcher / Strategic Analyst (whether provided as a resource internal or external to the contractor) must have, at a minimum, the following qualifications:</p> <p>A degree or diploma from a recognized university or post-secondary institution;          Ten (10) assignments or projects providing research and/or strategic analysis services related to learning in the last ten (10) years;          Fluency in French or English;</p> <p>The Intermediate Researcher / Strategic Analyst must have, at a minimum, the following qualifications:</p> <p>A degree or diploma from a recognized university or post-secondary institution;          Five (5) assignments or projects providing research and/or strategic analysis services related to learning in the last five (5) years;          Fluency in French or English;</p> <p>The Support Researcher / Strategic Analyst must have, at a minimum, the following qualifications:</p> <p>A degree or diploma from a recognized university or post-secondary institution;          Three (3) years' experience performing data entry and processing related;          Fluency in French or English.</p>

**9.0 SERVICE STANDARDS**

CFSC will measure the Contractor's performance in relation to the outcomes and results of the Contractor's work, together with the extent to which the work is carried out in a timely manner, to CFSC's clients' satisfaction and in accordance with the established standards, as stated in the Contract and Task Authorization. The following methods will be used to measure the Contractor's qualifications and/or performance:

- 9.1 according to the minimum resource qualifications set out in Article 8.0 'Personnel Categories and Minimum Qualifications';
- 9.2 by reviewing performance against Task Authorization project plans and standards;
- 9.3 by performance feedback from CFSC clients, CFSC Managers and event participants regarding their satisfaction with the service;

9.4 by following up on TA Work to see if there were any problems which should have been revealed by the Contractor;

9.5 adherence to CFSC's instructional design methodology and quality standards established or deemed acceptable by CFSC; and

9.6 by on-going assessments of the Contractor's adherence to the approach, methodologies, and financial proposal proposed by the Contractor in response to the Request for Proposal, and, from time to time, of the Contractor's performance of requirements specified in Task Authorizations.

## **10.0 LOCATION OF WORK, TRAVEL AND TIME**

### **10.1 Location of Work**

Work will take place primarily at the Contractor's place of business, with the exception of the facilitation of learning events. The Contractor will also be frequently required to provide services at CFSC's Bisson Campus in Gatineau, Quebec. Certain resources including the Learning Product Manager, Graphic Designer and Documentation Specialists will be expected to be onsite on the Bisson Campus for the majority of the time required to perform requested tasks. The Contractor will also be frequently required to provide services locations throughout Canada, the United States, and at overseas locations, as detailed in individual Task Authorization Forms.

The facilitation of learning events will take place throughout Canada, North America and at overseas locations. Events in the National Capital Region will be delivered at the Bisson campus in Gatineau, Quebec, Canada, at client sites, or in locations determined by the CFSC Project Authority or his/her delegated representative in accordance with criteria established by or deemed acceptable to CFSC. Events may be delivered at the Contractor's facilities if suitable, cost effective and approved by CFSC. Events may also be delivered at the third-party facilities proposed by the Contractor's event coordination and administration personnel if the facilities are suitable, cost effective and approved by CFSC.

### **10.2 Travel**

If a facilitator is required to travel outside of the NCR, the Greater Toronto Area, the Greater Montreal Area and Kingston (ON) to facilitate a CFSC intercultural learning event, or a country resource person or subject matter expert is required to travel to contribute to a learning event in a location specified in an individual Task Authorization form, CFSC will pay travel and living costs in addition to the professional fees proposed for facilitation (the base per diem rates do not include travel and living costs). The Contractor must ensure that travel costs are minimized and subject to pre-approval by the appropriate CFSC authority.

CFSC will also reimburse the Contractor for the cost of travel and accommodation for resources required to attend professional development activities, in accordance with, but not to exceed, the current versions of Treasury Board Guidelines for Travel and Living Expenses. Travel arrangements will be made at the most economical available advance booking fare and CFSC shall not be responsible for any additional travel costs incurred by the Contractor's resources. CFSC will not remunerate the Contractor or its resources or pay honoraria for the time spent attending required professional development activities. In specialized areas such as international learning events or Election Observer missions, CFSC will retain discretion over offering honoraria and/or reimbursing associated travel and living costs to the contracted resources for necessary knowledge or skill development.

The Contractor is responsible for ensuring the health and safety of its personnel, including obtaining all recommended vaccinations, medical insurance and other health or safety considerations.

### 10.3 Time of Work

It is anticipated that approximately 70% of learning events will be delivered Monday to Friday and approximately 30% of learning events delivered on weekends. Event coordination and facilitation services will be required Monday to Sunday, between the hours of 8:00 am and 5:00 pm (Local Time).

### 11.0 LANGUAGE OF WORK

As an Agency of the federal government, CFSC is required under the Official Languages Act to provide its services in the official language of its clients' choice.

The Contractor must be responsible for ensuring capability and capacity to facilitate learning events in English, French, and bilingually (English and French), as required in each individual Task Authorization form.

The Contractor must ensure that all verbal and written communication with CFSC is in the preferred language of the CFSC Project Authority. If learning event participants are required to communicate by telephone with the Contractor or his/her representatives, the Contractor must ensure that all persons, including receptionists and other contacts who will be receiving these calls, are bilingual.

Where it is stated that a Contractor resource must have proficiency in English, proficiency is deemed to be at level 4 – Advanced Professional Proficiency, or higher. Where it is stated that a Contractor resource must have proficiency in French, proficiency is deemed to be at level 4 – Advanced Professional Proficiency, or higher. Where it is stated that a Contractor resource must have proficiency in either English or French, proficiency is deemed to be at level 4 – Advanced Professional Proficiency, or higher in one of the two (2) official languages. Where it is stated that a Contractor resource must have proficiency in English and French, proficiency is deemed to be at level 4 – Advanced Professional Proficiency, or higher, in one of the two (2) official languages and at level 3 – General Professional Proficiency, or higher, in the other of the two (2) official languages, according to the GAC language scales.

For more information regarding the GAC language scales, refer to [http://www.international.gc.ca/ifait-iaeci/test\\_levels-niveaux.aspx?lang=eng&view=d](http://www.international.gc.ca/ifait-iaeci/test_levels-niveaux.aspx?lang=eng&view=d).

### 12.0 GLOSSARY OF ACRONYMS AND TERMS

Acronyms used in this Statement of Work are defined as follows:

CFSC:	Centre for Intercultural Learning (refer to website below for an overall description)
CFSI:	Canadian Foreign Service Institute
CIDA:	Canadian International Development Agency
CIISD:	Canadian and International Industrial Security Directorate
GAC:	Global Affairs Canada (Refer to website below for information on the department)
NCR:	National Capital Region
NGO	Non-Governmental Organization
QA:	Quality Assurance
SoW:	Statement of Work

Terms used in this Statement of Work are defined as follows:

Consultation:	Consultation is defined as all other work aside from learning event delivery and facilitation and may include tasks related to intercultural facilitation, organizational development, and research and development.
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Country Information: Refers to country-specific information (in print and/or electronic format) provided to event participants. CFSC gathers this information from subscribed sources. A typical example is provided in the Reference – Websites and Links section below.

Event: Overarching term for any activity (course, program, briefing, workshop sessions, retreats) included in this document.

- Learning Event: Refers to an event which features learning participants and facilitator(s) in the same training room or facility at the same time.

Participant: Refers to a third-party learner participating in a CFSC event.

Treasury Board: Cabinet Committee that manages the government's financial, personnel and administrative responsibilities, as well as approving regulations and most Orders in Council requiring Governor in Council approval.

### 13.0 REFERENCES - WEBSITES AND LINKS

Centre for Intercultural Learning – reference for an overall description of CFSC, including events, information services, research publications and contact information:

[www.intercultures.gc.ca](http://www.intercultures.gc.ca)

Treasury Board Home Page – reference for Government of Canada Hospitality and Travel directives:

[http://www.tbs-sct.gc.ca/index\\_e.asp](http://www.tbs-sct.gc.ca/index_e.asp)

Global Affairs Canada Home Page:

<http://www.international.gc.ca>

Global Affairs Canada Language Scales:

[http://www.international.gc.ca/ifait-iaeci/test\\_levels-niveaux.aspx?lang=eng&view=d](http://www.international.gc.ca/ifait-iaeci/test_levels-niveaux.aspx?lang=eng&view=d)

Example Country Information package - English:

<http://www.international.gc.ca/cfsi-icse/cil-cai/pdf/RussiaCompilation2011-en.pdf>

Example Country Information package - French:

<http://www.international.gc.ca/cfsi-icse/cil-cai/pdf/RussiaCompilation2011-fr.pdf>

Definitions of the National Zone, Regions and Metropolitan Areas

<http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/dznrrm-dnzmra-eng.html>

## ANNEX B, BASIS OF PAYMENT

For work performed in accordance with the Contract, the Contractor will be paid as specified below

### 1.0 Learning Event Coordination and Administration

Upon the satisfactory completion of the learning event, the Contractor will be paid firm all-inclusive per diem rates (\$CAD) listed in Table B1 below for the provision of coordination and administration services for learning events.

**Table B1**

Resource Category	Initial Contract Period	Option Year 1	Option Year 2
	Per Diem Rate (\$)	Per Diem Rate (\$)	Per Diem Rate (\$)
Coordinators			
Document Production Specialist			

### 2.0 Learning Event Delivery and Facilitation

Upon the satisfactory completion of the learning event, the Contractor will be paid a firm all-inclusive per diem rate (\$CAD) listed in Table B2 below for the provision of delivery and facilitation services for intercultural learning events.

#### 2.1 Learning Events Delivered in Canada

**Table B2.1**

Event Location	Event Duration	Initial Contract Period	Option Year 1	Option Year 2
		Per Diem Rate (\$)	Per Diem Rate (\$)	Per Diem Rate (\$)
NCR (travel costs included)	0.5 day			
	1 day			
	2 days			
	3 days to >3 days			
Toronto, Montreal and Kingston (travel costs included)	0.5 day			
	1 day			
	2 days			
	3 days to >3 days			
Other locations within Canada (travel costs excluded)	0.5 day			
	1 day			
	2 days			
	3 days to >3 days			

For learning events with 1.5 and 2.5 day durations, the 1 day and 2 day event duration rates, respectively, will be prorated accordingly.

For an event with 1.5 days duration:

Professional fees = 1.5 x the firm all-inclusive per diem rate for learning events with 1 day duration

For an event with 2.5 days duration:

Professional fees = 2.5 x the firm all-inclusive per diem rate for learning events with 2 days duration

## 2.2 Specialized Learning Events and Process Facilitation Events within Canada and Internationally

**Table B2.2**

	Initial Contract Period	Option Year 1	Option Year 2
Type of Event	Per diem rate (\$)	Per diem rate (\$)	Per diem rate (\$)
Specialized Events (locations in Canada and international) (travel costs excluded)			

## 3.0 Provision of Country Resource Personnel and Subject Matter Experts to support Learning Events

### 3.1 Country Resource Personnel

Upon the satisfactory completion of the learning event, the Contractor will be paid a firm all-inclusive per diem rate (\$CAD) listed in Table B3.1 below for the provision of country resource personnel to support learning events.

**Table B3.1**

Resource Type	Duration of In-Classroom Involvement	Initial Contract Period	Option Year 1	Option Year 2
		Per Diem Rate (\$)	Per Diem Rate (\$)	Per Diem Rate (\$)
Country Resource Personnel	0.5 day			
	1 day			

### 3.2 Subject Matter Experts

Upon the satisfactory completion of the learning event, the Contractor will be paid a firm all-inclusive percentage **mark up** (%), listed in Table B3.2 below for the provision of subject matter experts to support learning events.

**Table B3.2**

Resource Type	Initial Contract Period	Option Year 1	Option Year 2
	Mark-Up (%)	Mark-Up (%)	Mark-Up (%)
Subject Matter Experts			

#### 4.0 Learning Event Design and Development

Upon the satisfactory completion of the Work, the Contractor will be paid a firm all-inclusive per diem rate (\$CAD) listed in Table B4 below for learning event design and development services.

**Table B4**

Initial Contract Period	Option Year 1	Option Year 2
Per Diem Rate (\$)	Per Diem Rate (\$)	Per Diem Rate (\$)

#### 5.0 Learning Product Design Development Services

Upon the satisfactory completion of the Work, the Contractor will be paid firm all-inclusive per diem rates (\$CAD) listed in Table B5 below for learning product development services.

**Table B5**

Resource Category	Initial Contract	Option Year 1	Option Year 2
	Per Diem Rate (\$)	Per Diem Rate (\$)	Per Diem Rate (\$)
Learning Product Manager			
Instructional Designer – e-learning			
Writer			
Text Editor			
Graphic Designer			
Web Designer/ Developer			
E-Learning Designer and Developer			
Database Developer/ Administrator			
Media Producer			
IT Support			

#### 6.0 Research and Strategic Advisory Services related to Learning

Upon the satisfactory completion of the Work, the Contractor will be paid a firm all-inclusive **per diem** rate (\$CAD) listed in Table B6 below for research and strategic advisory services related to learning programs.

**Table B6**

Resource Level	Initial Contract Period	Option Year 1	Option Year 2

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	Per Diem Rate (\$)	Per Diem Rate (\$)	Per Diem Rate (\$)
Senior			
Intermediate			
Support			

**7.0 Related Services and Resources**

Upon the satisfactory completion of the Work, the Contractor will be paid a firm all-inclusive per diem rate (\$CAD) listed in Table B7 below for related services and resources.

**Table B7**

Initial Contract Period	Option Period 1	Option Period 2
Monthly rate per classroom (\$)	Monthly rate per classroom (\$)	Monthly rate per classroom (\$)

**8.0 Cost Reimbursable Expenses**

**8.1 Authorized travel and living expenses**

For the requirements relative to travel described in section 10.2 of the Statement of Work in Annex A

The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided 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 Project Authority..

The authorized travel and living expenses will be paid upon submission of an itemized statement supported by receipt vouchers. All payments are subject to government audit.

Canada will not accept any travel and living expenses for:

- a. work performed within the National Capital Region (NCR), the Greater Toronto Area, the Greater Montreal Area and Kingston, ON. 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/eng/acts/N-4/> and a definition of the Greater Toronto Area and the Greater Montreal Area is provided in section 12.0 of Annex A and on the following website: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/dznrrm-dnzmra-eng.html>;
- b. travel between the successful Bidder's place of business and the NCR, the Greater Toronto Area, the Greater Montreal Area and Kingston, ON; and
- c. the relocation of resources

Total Estimated Cost of Authorized Travel and Living Expenses: \$700,000.00

**8.2 Other Direct Expenses**

The Contractor will be reimbursed the other direct expenses it reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and administrative overhead. These expenses will be paid upon submission of an itemized statement supported by receipt vouchers.

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Total Estimated Cost of Other Direct Expenses: \$50,000.00

**Total Estimated Cost - Reimbursable Expenses: \$750,000.00**

## **9.0 Cancellation of Learning Events**

### **9.1 Event Coordination and Administration**

a) In the event that a confirmed learning event is cancelled through no fault of the Contractor, the Contractor shall be paid based on the work performed prior to cancellation of the event.

b) In order to be entitled to payment, the Contractor shall provide a statement of the degree to which the activities had been completed at the time of receipt of the cancellation notice. The CFSC Project Authority and/or the PWGSC Contract Authority may from time-to-time review the Contractor's file with the supporting evidence to verify the said statement. Should the Project Authority require additional evidence not contained in the file, the Contractor shall do so at its own expense.

c) In all cases, direct expenses related to training facilities, participant amenities, and participant expenses shall be reimbursed when the Contractor produces proof of an imposed cancellation fee by a service provider. Subcontractors engaged by the Contractor for the services under this contract are not deemed to be a direct expense in relation to the cancellation clauses herein.

### **9.2 Event Delivery and Facilitation**

In the event that the delivery of a confirmed learning event is cancelled through no fault of the Contractor, the Contractor shall be paid as follows:

- i) Where the notice of cancellation is received 6 to 10 business days prior to the confirmed delivery start date, the Contractor shall be paid an amount corresponding to 25% of the applicable fixed/firm price for learning event delivery and facilitation services.
- ii) Where the notice of cancellation is received 5 or fewer business days prior to the confirmed delivery start date, the Contractor shall be paid an amount corresponding to 60% of the applicable fixed price for learning event delivery and facilitation services.

## **10.0 Definition of a Day**

10.1 For Learning Event Delivery and Facilitation, a work day is defined as the time required for the full extent of event delivery as described in section 3.2 of the Statement of Work. Payment shall be made for days actually worked, with no provision for annual leave, statutory holidays and sick leave.

10.2 For all other roles functions (excluding those in 9.1 above), a day is defined as 8 hours of work, exclusive of meal breaks. Payment shall be made for days actually worked, with no provision for annual leave, statutory holidays and sick leave. If time worked is more or less than a day, the daily rate shall be prorated to reflect the actual time worked.

The formula to be used for the purpose of prorating a day is as follows:

$$\frac{\text{Number of Hours Worked}}{8 \text{ hours}} \times \text{The Firm all-inclusive rate}$$

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## ANNEX C, SECURITY REQUIREMENTS CHECK LIST

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE			
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine		2. Branch or Directorate / Direction générale ou Direction CFSC	
3. a) Subcontract Number / Numéro du contrat de sous-traitance		3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail Blended Learning Program Design, Development, Facilitation, Coordination and Support			
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
6. Indicate the type of access required / Indiquer le type d'accès requis			
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c.) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c.)		<input type="checkbox"/> No Non	<input checked="" type="checkbox"/> Yes Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès			
Canada <input checked="" type="checkbox"/>		NATO / OTAN <input type="checkbox"/>	
Foreign / Étranger <input type="checkbox"/>			
7. b) Release restrictions / Restrictions relatives à la diffusion			
No release restrictions Aucune restriction relative à la diffusion	<input checked="" type="checkbox"/>	All NATO countries Tous les pays de l'OTAN	<input type="checkbox"/>
Not releasable À ne pas diffuser	<input type="checkbox"/>	Not releasable À ne pas diffuser	<input type="checkbox"/>
Restricted to: / Limité à: Specify country(ies) / Préciser le(s) pays :	<input type="checkbox"/>	Restricted to: / Limité à: Specify country(ies) / Préciser le(s) pays :	<input type="checkbox"/>
7. c) Level of information / Niveau d'information			
PROTECTED A PROTÉGÉ A	<input checked="" type="checkbox"/>	NATO UNCLASSIFIED NATO NON CLASSIFIÉ	<input type="checkbox"/>
PROTECTED B PROTÉGÉ B	<input checked="" type="checkbox"/>	NATO RESTRICTED NATO DIFFUSION RESTREINTE	<input type="checkbox"/>
PROTECTED C PROTÉGÉ C	<input type="checkbox"/>	NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/>
CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/>	NATO SECRET NATO SECRET	<input type="checkbox"/>
SECRET SECRET	<input checked="" type="checkbox"/>	COSMIC TOP SECRET COSMIC TRÈS SECRET	<input type="checkbox"/>
TOP SECRET TRÈS SECRET	<input type="checkbox"/>		
TOP SECRET (SIGINT) TRÈS SECRET (SIGINT)	<input type="checkbox"/>		
PROTECTED A PROTÉGÉ A			<input type="checkbox"/>
PROTECTED B PROTÉGÉ B			<input type="checkbox"/>
PROTECTED C PROTÉGÉ C			<input type="checkbox"/>
CONFIDENTIAL CONFIDENTIEL			<input type="checkbox"/>
SECRET SECRET			<input type="checkbox"/>
TOP SECRET TRÈS SECRET			<input type="checkbox"/>
TOP SECRET (SIGINT) TRÈS SECRET (SIGINT)			<input type="checkbox"/>
PART A (continued) / PARTIE A (suite)			
8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets? Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? If Yes, indicate the level of sensitivity: Dans l'affirmative, indiquer le niveau de sensibilité :		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui

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9. Will the supplier require access to extremely sensitive INFOSEC information or assets?  
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?  No / Non  Yes / Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel :  
Document Number / Numéro du document :

**PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)**

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

- |  |   |  |  |
|--|---|--|--|
| <input type="checkbox"/> RELIABILITY STATUS<br>COTE DE FIABILITÉ   | <input type="checkbox"/> CONFIDENTIAL<br>CONFIDENTIEL           | <input checked="" type="checkbox"/> SECRET<br>SECRET | <input type="checkbox"/> TOP SECRET<br>TRÈS SECRET               |
| <input type="checkbox"/> TOP SECRET-SIGINT<br>TRÈS SECRET - SIGINT | <input type="checkbox"/> NATO CONFIDENTIAL<br>NATO CONFIDENTIEL | <input type="checkbox"/> NATO SECRET<br>NATO SECRET  | <input type="checkbox"/> COSMIC TOP SECRET<br>COSMIC TRÈS SECRET |
| <input type="checkbox"/> SITE ACCESS<br>ACCÈS AUX EMPLACEMENTS     |   |  |  |

Special comments:  
Commentaires spéciaux :

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.  
REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?  
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail?  No / Non  Yes / Oui  
If Yes, will unscreened personnel be escorted?  
Dans l'affirmative, le personnel en question sera-t-il escorté?  No / Non  Yes / Oui

**PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)**

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?  
Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS?  No / Non  Yes / Oui  
11. b) Will the supplier be required to safeguard COMSEC information or assets?  
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC?  No / Non  Yes / Oui

**PRODUCTION**

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?  
Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?  No / Non  Yes / Oui

INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?  
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS?  No / Non  Yes / Oui  
11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?  
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale?  No / Non  Yes / Oui

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**PART C - (continued) / PARTIE C - (suite)**

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.  
 Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.  
 Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

**SUMMARY CHART / TABLEAU RÉCAPITULATIF**

Category Catégorie	PROTECTED PROTÉGÉ			CLASSIFIED CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET TRÈS SECRET	NATO RESTRICTED NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET COSMIC TRÈS SECRET	PROTECTED PROTÉGÉ			CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET TRÈS SECRET
											A	B	C			
Information / Assets Renseignements / Biens	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Production	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT Media / Support TI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT Link / Lien électronique	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?  
 La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?

No  
Non  Yes  
Oui

**If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".**  
**Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée**  
**« Classification de sécurité » au haut et au bas du formulaire.**

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?  
 La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

No  
Non  Yes  
Oui

**If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).**  
**Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée**  
**« Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).**

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## ANNEX D, TASK AUTHORIZATION FORM

Contract Number:	Project Code and Commitment:
Program/Project Manager:	Task Number:
Task Title:	

### 1.0 To be completed by the Project Authority:

You are requested to consider the following projected tasks and to submit, within **two (2)** calendar days, your proposal for the performance of this Work, in accordance with the provisions of the TASK AUTHORIZATION clause of the above reference contract.

### 1.1 Description:

Pursuant to the Annex A - Statement of Work and Annex B - Basis of Payment, the Centre for Intercultural Learning requires the following services:

### 1.2 Deliverables:

### 1.3 Projected required delivery date:

Project Authority

---

Name

Signature

Date



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### 3.0 Approvals:

Statement of Requirement:

The contractor shall perform the Work in accordance with:

- The Statement of Requirement attached hereto.
- The contractor's Technical Proposal for the Task Authorization, dated .....  
Remark: If clarification were requested from the Contractor, add, as applicable: as clarified by the Contractor's ..... dated .....

Deliverables:

- as specified in the Statement of Requirement attached hereto.
- as specified in the Contractor's Technical Proposal specified above for the Task Authorization.
- as follows:

Specify:

Delivery Date(s):

**Approved:**

---

Name

Signature

Date

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## ANNEX E, 48-HOUR REPORT FORM



CANADIAN FOREIGN SERVICE INSTITUTE  
CENTRE FOR INTERCULTURAL LEARNING

48-HOUR REPORT

Internal CIL document – 12/2011

Please send your 48-Hour Report to the coordinator with the CIL Learning Advisor in cc.

Is there an immediate follow-up requested regarding any of the issues mentioned below?  Yes  No  
If so, what is the subject?

To be completed by the Learning Advisor when appropriate

--

Course Title:

Course Location and Date:

Prg #:

Facilitator Name:

Report Date:

### FACILITATOR'S COMMENTS

1. Describe the client (name, new, existing, etc.), type of training, country(ies) or project(s):

--

2. Describe the participant group (size, gender break-down, group diversity and other characteristics):

--

3. Describe the program, referring to existing lesson plans or road maps. If new road maps were developed, please attach:

--

4. If applicable, any comments or concerns about Country Resource Persons or Subject Matter Experts?

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5. If applicable, describe at least one situation (on topics of adaptation, communication, development or others) used during the course that could serve to enrich CIL's bank of case studies or critical incidents. To present the decoding of a situation, you may use the model provided below:

Situation:

--

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<b>Behaviour (CDN)</b>	<b>Behaviour (other)</b>
<b>Norms:</b>	<b>Norms:</b>
<b>Values:</b>	<b>Values:</b>
<b>Bridge(s):</b>	
<b>6. Logistical Details - comment on the facilities, catering, audio-visual equipment:</b>	
<b>7. Recommendations - for the Coordination Unit, Learning Advisor, CIL Marketing or others (please specify):</b>	
<b>8. Additional comments:</b>	

To be completed by the Coordinator			
<b>Coordinator:</b>		<b>Learning Advisor:</b>	
<b>Client Organization / Canadian Executing Agency:</b>		<b>AL Kit / On-site coordination:</b>	
<b>No. of pax to invoice CIL:</b>		<b>No. of pax to invoice CIDA (# women and # men):</b>	
<b>Course duration:</b>		<b>Letter of Agreement (if applicable, please specify amount):</b>	
		<b>Hospitality request (yes or N/A):</b>	
<b>Coordinator's comments on the 48-Hour Report and course delivery:</b>			
<b>Recommendations and proposed actions:</b>			
<b>Summary of Evaluations:</b>			

## ANNEX F, COURSE EVALUATION FORM

### Evaluation questionnaire

Course Title: \_\_\_\_\_  
 Facilitator: \_\_\_\_\_ Date: \_\_\_\_\_  
 Country of Assignment: \_\_\_\_\_ PRG #: \_\_\_\_\_  
 Name (optional): \_\_\_\_\_

Place a check mark in the box corresponding to your response.

Environment and Logistics	Strongly Disagree			Strongly Agree	
	1	2	3	4	5
1. The facilities and equipment were favourable to learning.					

Content and Design	Strongly Disagree			Strongly Agree	
	1	2	3	4	5
2. The learning objectives were relevant, clear and concise.					
3. The depth of the content was appropriate.					
4. The content was logically sequenced.					
5. The balance between theory and practice was adequate.					
6. The learning materials were well organized and useful.					

Overall Results	Strongly Disagree			Strongly Agree	
	1	2	3	4	5
7. The objectives were attained.					
8. There was adequate opportunity for me to ask questions and dialogue.					
9. My knowledge and/or skills increased as a result of this course.					
10. I feel confident in being able to apply the learning.					
11. Overall, the course content met my needs.					

Comments (some things I learned, I liked, I would suggest):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

see reverse →

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Facilitator	Strongly Disagree			Strongly Agree	
	1	2	3	4	5
1. Made positive contribution towards achieving learning objectives.					
2. Was well prepared and organized.					
3. Created an environment of trust.					
4. Initiated group interaction and participation.					
5. Overall, the facilitation process met my needs.					

Comments:

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Country Resource Person	Name: _____	Strongly Disagree			Strongly Agree	
	Country: _____	1	2	3	4	5
1. Made positive contribution towards achieving learning objectives.						
2. Was well prepared and organized.						
3. Had good presentation skills.						
4. Was responsive to participants' needs and interests.						
5. Overall, I was satisfied with the Country Resource Person.						

Comments:

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