



**RETURN BIDS TO:  
RETOURNER LES SOUMISSIONS À:**

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

**REQUEST FOR 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**

**Vendor/Firm Name and Address**

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

**Issuing Office - Bureau de distribution**

Training and Specialized Services Division/Division de la  
formation et des services spécialisés  
Terrasses de la Chaudière 5th Floor  
Terrasses de la Chaudière 5e étage  
10 Wellington Street,  
10, rue Wellington,  
Gatineau  
Québec  
K1A 0S5

<b>Title - Sujet</b> LEADERSHIP TRAINING	
<b>Solicitation No. - N° de l'invitation</b> 08B62-170553/A	<b>Date</b> 2019-02-07
<b>Client Reference No. - N° de référence du client</b> 20170553	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$ZH-150-34597	
<b>File No. - N° de dossier</b> 150zh.08B62-170553	<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 2019-03-22</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 checked="" type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Hall, Mark	<b>Buyer Id - Id de l'acheteur</b> 150zh
<b>Telephone No. - N° de téléphone</b> (613) 858-8626 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b>  Specified Herein Précisé dans les présentes	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

<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/</b> <b>de l'entrepreneur (taper ou écrire en caractères d'imprimerie)</b>	
<b>Signature</b>	<b>Date</b>

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## **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: the Pricing Schedule, the Mandatory Technical Evaluation Criteria, and Additional Certifications Precedent to Contract Award.

The Annexes include: the Statement of Work, the Basis of Payment, the Task Authorization Form and a Sample MS Office Excel Spreadsheet for Period Usage Reports – Contracts with TAs.

### **1.2 Summary**

1.2.1 The Centre of Learning for International Affairs and Management (CFSD) of Foreign Affairs, Trade & Development Canada (DFATD) intends to procure the services of one (1) supplier capable of providing to CFSD "as and when requested" support for its learning programs and related activities by providing the following services:

- Learning Event Administrative Services;
- Learning Event Delivery and Facilitation;
- Learning Event Design and Development;
- Learning Product Design and Development: E-learning, video and media development, print and electronic documents, and graphic services;
- Research and Advisory Services related to Learning;
- Leadership Coaching and Self-Assessment Services;
- Organizational Development; and
- Related Services and Resources.

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

- 1.2.2 This bid solicitation is intended to result in the award of one contract covering an initial period of one (1) year, with the irrevocable option to extend the period of the contract by up to four (4) additional one year periods under the same conditions.
- 1.2.3 There are no security requirements associated with this requirement.
- 1.2.4 The requirement is subject to the provisions of the North American Free Trade Agreement (NAFTA), and the Canadian Free Trade Agreement (CFTA).
- 1.2.5 The resulting contract will not include deliveries of services within locations within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirements for deliveries of services within locations within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador that are subject to CLCAs will have to be treated as a separate procurement not forming part of this bid solicitation.
- 1.2.6 The Federal Contractors Program (FCP) for employment equity applies to this procurement; see Part 5 - Certifications, Part 7 - Resulting Contract Clauses and 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.

### **1.4 Phase Bid Compliance Process**

The Phased Bid Compliance Process applies to this requirement.

## 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 (2018-05-22) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

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

Delete: 60 days

Insert: 120 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 and time indicated on page 1 of the bid solicitation. For further details on the submission of bids see PART 3 - Bid Preparation Instructions below.

### 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 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;
- 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 Enquiries - 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 Quebec.

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**

Foreign Affairs, Trade & Development Canada (DFATD) 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.



## PART 3 – BID PREPARATION INSTRUCTIONS

### 3.1 Bid Preparation Instructions

- a) Due to the nature of the bid solicitation, bids transmitted by facsimile will not be accepted.
- b) The bid must be separated as follows:  
  
Section I: Technical Bid  
Section II: Financial Bid  
Section III: Certifications and Additional Information
- c) If the Bidder chooses to submit its bid electronically using the epost Connect service provided by Canada Post Corporation,
  - o the Bidder is invited to consult the information available on the Canada Post Corporation website (<https://www.canadapost.ca/cpc/en/business/postal-services/digital-mail/epost-connect.page>);
  - o the Bidder should refer to section 08, Transmission by facsimile or by epost Connect, of the 2003 standard instructions. Sub-section 2, epost connect, contains instructions and conditions; and
  - o the Bidder must submit its bid in a single transmission.
- d) If the Bidder chooses to submit its bid to the PWGSC Bid Receiving Unit electronically not using the epost Connect service provided by Canada Post Corporation, Canada requests one envelope containing one copy of the bid on a USB key or a CD. The Bidder should ensure that the Bidder's name and address and bid solicitation number are clearly visible on the envelope.
- e) Canada is not requesting hard copies of the bid. However, if the Bidder chooses to submit its bid to the PWGSC Bid Receiving Unit in hard copies, Canada requests:  
  
Section I, II and III: One (1) hard copy each of the 3 sections
- f) If there is a discrepancy between the wording of any copies of the bid that appear on the following list, the wording of the copy that first appears on the list has priority over the wording of any copy that subsequently appears on the list:
  - o the electronic copy of the bid submitted by using the epost Connect service provided by Canada Post Corporation;
  - o the electronic copy of the bid submitted to the PWGSC Bid Receiving Unit on a USB key or a CD;
  - o the hard copies of the bid submitted to the PWGSC Bid Receiving Unit.

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

If the Bidder chooses to submit its bid in hard copies, 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 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.

### **Section II: Financial Bid**

- a) Bidders must submit their financial bid in Canadian funds (CAD) and in accordance with the pricing schedule detailed in Attachment 1 to Part 3, Pricing Schedule.
- 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) 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.

Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

#### **Option 1:**

The Bidder accepts to be paid by the following Electronic Payment Instrument(s):

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

#### **Option 2:**

- ☐ The Bidder does not accept to be paid by Electronic Payment Instruments.

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File No. - N° du dossier

**150zh.08B62-170553**

Buyer ID - Id de l'acheteur

**150zh**

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### **Section III: Certifications and Additional Information**

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

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Buyer ID - Id de l'acheteur

**150zh**

CCC No./N° CCC - FMS No./N° VME

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## **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.

## **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 Mandatory Technical Evaluation Criteria.

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

#### **4.1.1 Phased Bid Compliance Process (PBCP)**

##### **4.1.1.1 (2018-07-19) General**

- a) Canada is conducting the PBCP described below for this requirement.
- b) Notwithstanding any review by Canada at Phase I or II of the PBCP, Bidders are and will remain solely responsible for the accuracy, consistency and completeness of their Bids and Canada does not undertake, by reason of this review, any obligations or responsibility for identifying any or all errors or omissions in Bids or in responses by a Bidder to any communication from Canada.

THE BIDDER ACKNOWLEDGES THAT THE REVIEWS IN PHASE I AND II OF THIS PBCP ARE PRELIMINARY AND DO NOT PRECLUDE A FINDING IN PHASE III THAT THE BID IS NON-RESPONSIVE, EVEN FOR MANDATORY

REQUIREMENTS WHICH WERE SUBJECT TO REVIEW IN PHASE I OR II AND NOTWITHSTANDING THAT THE BID HAD BEEN FOUND RESPONSIVE IN SUCH EARLIER PHASE. CANADA MAY DEEM A BID TO BE NON-RESPONSIVE TO A MANDATORY REQUIREMENT AT ANY PHASE.

THE BIDDER ALSO ACKNOWLEDGES THAT ITS RESPONSE TO A NOTICE OR A COMPLIANCE ASSESSMENT REPORT (CAR) (EACH DEFINED BELOW) IN PHASE I OR II MAY NOT BE SUCCESSFUL IN RENDERING ITS BID RESPONSIVE TO THE MANDATORY REQUIREMENTS THAT ARE THE SUBJECT OF THE NOTICE OR CAR, AND MAY RENDER ITS BID NON-RESPONSIVE TO OTHER MANDATORY REQUIREMENTS.

- c) Canada may, in its discretion, request and accept at any time from a Bidder and consider as part of the Bid, any information to correct errors or deficiencies in the Bid that are clerical or administrative, such as, without limitation, failure to sign the Bid or any part or to checkmark a box in a form, or other failure of format or form or failure to acknowledge; failure to provide a procurement business number or contact information such as names, addresses and telephone numbers; inadvertent errors in numbers or calculations that do not change the amount the Bidder has specified as the price or of any component thereof that is subject to evaluation. This shall not limit Canada's right to request or accept any information after the bid solicitation closing in circumstances where the bid solicitation expressly provides for this right. The Bidder will have the time period specified in writing by Canada to provide the necessary documentation. Failure to meet this deadline will result in the Bid being declared non-responsive.
- d) The PBCP does not limit Canada's rights under Standard Acquisition Clauses and Conditions (SACC) 2003 (2018-05-22) Standard Instructions – Goods or Services – Competitive Requirements nor Canada's right to request or accept any information during the solicitation period or after bid solicitation closing in circumstances where the bid solicitation expressly provides for this right, or in the circumstances described in subsection (c).

- e) Canada will send any Notice or CAR by any method Canada chooses, in its absolute discretion. The Bidder must submit its response by the method stipulated in the Notice or CAR. Responses are deemed to be received by Canada at the date and time they are delivered to Canada by the method and at the address specified in the Notice or CAR. An email response permitted by the Notice or CAR is deemed received by Canada on the date and time it is received in Canada's email inbox at Canada's email address specified in the Notice or CAR. A Notice or CAR sent by Canada to the Bidder at any address provided by the Bidder in or pursuant to the Bid is deemed received by the Bidder on the date it is sent by Canada. Canada is not responsible for late receipt by Canada of a response, however caused.

#### **4.1.1.2 (2018-03-13) Phase I: Financial Bid**

- (a) After the closing date and time of this bid solicitation, Canada will examine the Bid to determine whether it includes a Financial Bid and whether any Financial Bid includes all information required by the solicitation. Canada's review in Phase I will be limited to identifying whether any information that is required under the bid solicitation to be included in the Financial Bid is missing from the Financial Bid. This review will not assess whether the Financial Bid meets any standard or is responsive to all solicitation requirements.
- (b) Canada's review in Phase I will be performed by officials of the Department of Public Works and Government Services.
- (c) If Canada determines, in its absolute discretion that there is no Financial Bid or that the Financial Bid is missing all of the information required by the bid solicitation to be included in the Financial Bid, then the Bid will be considered non-responsive and will be given no further consideration.
- (d) For Bids other than those described in c), Canada will send a written notice to the Bidder ("Notice") identifying where the Financial Bid is missing information. A Bidder, whose Financial Bid has been found responsive to the requirements that are reviewed at Phase I, will not receive a Notice. Such Bidders shall not be entitled to submit any additional information in respect of their Financial Bid.
- (e) The Bidders who have been sent a Notice shall have the time period specified in the Notice (the "Remedy Period") to remedy the matters identified in the Notice by providing to Canada, in writing, additional information or clarification in response to the Notice. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the Notice.
- (f) In its response to the Notice, the Bidder will be entitled to remedy only that part of its Financial Bid which is identified in the Notice. For instance, where the Notice states that a required line item has been left blank, only the missing information may be added to the Financial Bid, except that, in those instances where the addition of such information will necessarily result in a change to other calculations previously submitted in its Financial Bid, (for example, the calculation to determine a total price), such necessary adjustments shall be identified by the Bidder and only these adjustments shall be made. All submitted information must comply with the requirements of this solicitation.
- (g) Any other changes to the Financial Bid submitted by the Bidder will be considered to be new information and will be disregarded. There will be no change permitted to any other Section of the Bidder's Bid. Information submitted in accordance with the requirements of this solicitation in response to the Notice will replace, in full, only that part of the original Financial Bid as is permitted above, and will be used for the remainder of the bid evaluation process.
- (h) Canada will determine whether the Financial Bid is responsive to the requirements reviewed at Phase I, considering such additional information or clarification as may have been provided by the Bidder in accordance with this Section. If the Financial Bid is not found responsive for the requirements reviewed

at Phase I to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.

- (i) Only Bids found responsive to the requirements reviewed in Phase I to the satisfaction of Canada, will receive a Phase II review.

#### 4.1.1.3 (2018-03-13) Phase II: Technical Bid

- a) Canada's review at Phase II will be limited to a review of the Technical Bid to identify any instances where the Bidder has failed to meet any Eligible Mandatory Criterion. This review will not assess whether the Technical Bid meets any standard or is responsive to all solicitation requirements. Eligible Mandatory Criteria are all mandatory technical criteria that are identified in this solicitation as being subject to the PBCP. Mandatory technical criteria that are not identified in the solicitation as being subject to the PBCP, will not be evaluated until Phase III.
- b) Canada will send a written notice to the Bidder (Compliance Assessment Report or "CAR") identifying any Eligible Mandatory Criteria that the Bid has failed to meet. A Bidder whose Bid has been found responsive to the requirements that are reviewed at Phase II will receive a CAR that states that its Bid has been found responsive to the requirements reviewed at Phase II. Such Bidder shall not be entitled to submit any response to the CAR.
- c) A Bidder shall have the period specified in the CAR (the "Remedy Period") to remedy the failure to meet any Eligible Mandatory Criterion identified in the CAR by providing to Canada in writing additional or different information or clarification in response to the CAR. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the CAR.
- d) The Bidder's response must address only the Eligible Mandatory Criteria listed in the CAR as not having been achieved, and must include only such information as is necessary to achieve such compliance. Any additional information provided by the Bidder which is not necessary to achieve such compliance will not be considered by Canada, except that, in those instances where such a response to the Eligible Mandatory Criteria specified in the CAR will necessarily result in a consequential change to other parts of the Bid, the Bidder shall identify such additional changes, provided that its response must not include any change to the Financial Bid.
- e) The Bidder's response to the CAR should identify in each case the Eligible Mandatory Criterion in the CAR to which it is responding, including identifying in the corresponding section of the original Bid, the wording of the proposed change to that section, and the wording and location in the Bid of any other consequential changes that necessarily result from such change. In respect of any such consequential change, the Bidder must include a rationale explaining why such consequential change is a necessary result of the change proposed to meet the Eligible Mandatory Criterion. It is not up to Canada to revise the Bidder's Bid, and failure of the Bidder to do so in accordance with this subparagraph is at the Bidder's own risk. All submitted information must comply with the requirements of this solicitation.
- f) Any changes to the Bid submitted by the Bidder other than as permitted in this solicitation, will be considered to be new information and will be disregarded. Information submitted in accordance with the requirements of this solicitation in response to the CAR will replace, in full, **only** that part of the original Bid as is permitted in this Section.
- g) Additional or different information submitted during Phase II permitted by this section will be considered as included in the Bid, but will be considered by Canada in the evaluation of the Bid at Phase II only for the purpose of determining whether the Bid meets the Eligible Mandatory Criteria. It will not be used at any Phase of the evaluation to increase or decrease any score that

the original Bid would achieve without the benefit of such additional or different information. For instance, an Eligible Mandatory Criterion that requires a mandatory minimum number of points to achieve compliance will be assessed at Phase II to determine whether such mandatory minimum score would be achieved with such additional or different information submitted by the Bidder in response to the CAR. If so, the Bid will be considered responsive in respect of such Eligible Mandatory Criterion, and the additional or different information submitted by the Bidder shall bind the Bidder as part of its Bid, but the Bidder's original score, which was less than the mandatory minimum for such Eligible Mandatory Criterion, will not change, and it will be that original score that is used to calculate any score for the Bid.

- h) Canada will determine whether the Bid is responsive for the requirements reviewed at Phase II, considering such additional or different information or clarification as may have been provided by the Bidder in accordance with this Section. If the Bid is not found responsive for the requirements reviewed at Phase II to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.
- i) Only Bids found responsive to the requirements reviewed in Phase II to the satisfaction of Canada, will receive a Phase III evaluation.

#### **4.1.1.4 (2018-03-13) Phase III: Final Evaluation of the Bid**

- a) In Phase III, Canada will complete the evaluation of all Bids found responsive to the requirements reviewed at Phase II. Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- b) A Bid is non-responsive and will receive no further consideration if it does not meet all mandatory evaluation criteria of the solicitation.

#### **4.1.2 (2017-07-31) Technical Evaluation**

##### **4.1.2.1 Mandatory Technical Criteria**

The Phased Bid Compliance Process will apply to all mandatory technical criteria. Refer to Attachment 1 to Part 4.

##### **4.1.2.2 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 submitted 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.

#### **4.1.3 Financial Evaluation**

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.

#### **4.2 Basis of Selection**

##### **4.2.1. Lowest Evaluated Price**

4.2.1.1 A bid must comply with the requirements of the bid solicitation and meet all mandatory technical criteria to be declared responsive.

4.2.1.2 The responsive bid with the lowest total evaluated price will be recommended for award of a contract.

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## ATTACHMENT 1 TO PART 4, MANDATORY TECHNICAL EVALUATION CRITERIA

### **Mandatory Technical Evaluation Criteria (MTC)**

#### **MTC EXPERIENCE OF THE BIDDER**

For the experience cited, the Bidder must provide a summary list of projects in the format below for all the Mandatory Technical Criteria (MTC), unless specified otherwise:

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

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

#### **MTC 1 Learning Event and Administration**

The Bidder must have a minimum of three (3) years' experience within the past ten (10) years up to the bid solicitation closing date in providing learning event and administration services, as identified in Section 3.1 of the Statement of Work.

The Bidder must have provided learning event and administration services, as identified in Section 3.1 of the Statement of Work for at least fifty (50) learning event deliveries involving a total of at least eight hundred (800) participants within a twenty-four (24) month consecutive period within the past five (5) years.

#### **MTC 2 Learning Event Delivery and Facilitation**

The Bidder must have a minimum of three (3) years' experience within the past ten (10) years up to the bid solicitation closing date in providing learning event delivery and facilitation services, as identified in Section 3.2 of the Statement of Work.

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 fifty (50) learning event deliveries involving a total of at least eight hundred (800) participants within a twenty four (24) month consecutive period within the past five (5) years up to the bid solicitation closing date.

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### **MTC 3 Learning Event Design and Development**

The Bidder must have provided learning event design and development services, as identified in Section 3.3 of the Statement of Work, for at least ten (10) projects within the past five (5) 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.

### **MTC 4 Learning Product Design and Development**

The Bidder must have provided document graphic design and print production services, as identified in Section 3.4 of the Statement of Work, in support of learning programs. The minimum level of effort for graphic design services must be one hundred (100) days of graphic design within the last five (5) years up to the bid solicitation closing date.

The Bidder must have produced a minimum of twenty-five (25) graphic design and print products over the last five (5) years up to the bid solicitation closing date. A minimum of fifteen (15) products must have been produced in both official languages.

### **MTC 5 Research and Advisory Services**

The Bidder must have provided research and/or strategic advisory services, as identified in Section 3.5 of the Statement of Work, for at least five (5) projects within the past five (5) 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.

### **MTC 6 Coaching and Self-Assessment Services**

The Bidder must have provided coaching and self-assessment services, as identified in Section 3.6 of the Statement of Work, to at least fifty (50) professionals within a thirty six (36) month consecutive period within the past five (5) years up to the bid solicitation closing date.

### **MTC 7 Organizational Development Design and Delivery**

The Bidder must have provided OD event design and delivery services, as identified in Section 3.7 of the Statement of Work, for at least twenty (20) OD event deliveries within a twenty four (24) month consecutive period within the past five (5) years up to the bid solicitation closing date.

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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 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.

a) Bidders must complete their Certifications and Additional Information by using the PDF fillable form in Attachment 1 to Part 5 - Certifications and Additional Information.

b) Bidders should complete the interactive form electronically before printing the document for submission. Bidders should note that simply printing the document prior to completing it electronically may omit certain fields that would appear when filling out the form electronically, resulting in incomplete Certifications.

c) The form should be signed.

### **5.2 Electronic Payment of Invoices – Bid**

If you are willing to accept payment of invoices by Electronic Payment Instruments, please select the associated fields in the PDP fillable form under Attachment 1 to Part 5 – Certification and Additional Information.

If the fields in the fillable form under Attachment 1 to Part 5 – Certification and Additional Information are not completed, it will be considered as if Electronic Payment Instruments are not being accepted for payment of invoices.

Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

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

(Attached as a Separate Document)

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

### **6.1 Security Requirement**

6.1.1 There are no security requirements for this requirement.

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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 C, Authorization Form. An authorized TA is a completed Annex C signed by either the Project Authority or the Contracting Authority.

#### **C. TA Authority and Limit**

The Project Authority may authorize individual TAs inclusive of any revisions 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 must be authorized by the Contracting Authority before issuance to the Contractor. Only the Contracting Authority is authorized to change any firm unit price in the Contract or any resulting authorized TA's.

**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 Contractor will be provided with a request to perform a task prepared using Annex C, Task Authorization Form, containing as a minimum:

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1. 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;
  2. the Contract basis (bases) of payment applicable to the task or revised task; and
  3. the Contract method(s) of payment applicable to the task or revised task.
- F.** Within 5 calendar days of its receipt of the request, or as otherwise stated, 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; and;
  3. for each resource proposed by the Contractor for the performance of the Work required:
    - the name of the proposed resource;
    - the resume of the proposed resource; and
    - a demonstration that the proposed resource meets the minimum qualifications stated in Annex A, SOW.
- G.** TA Authorization
1. The Project 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 that each resource proposed by the Contractor for the performance of the Work required meets all the minimum qualifications specified in Annex A, SOW.
- H.** 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 10% 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 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



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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.

**I. 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 I.3 and I.4 of this clause is provided in Annex D.

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 following information appearing on the TA form must be included for each authorized revision, starting with revision 1, than 2, etc:
  - the TA revision number;
  - the date the revision to the task was authorized;
  - the authorized increase or decrease (Applicable Taxes extra);
  - the total estimated cost of the task (Applicable Taxes extra) after authorization of the revision;
  - the total cost incurred for the task (as last revised, as applicable), Applicable Taxes extra;
  - the total cost incurred and invoiced for the task (as last revised,as applicable), Applicable Taxes extra;
- the total amount of Applicable Taxes invoiced;
- the total amount paid, Applicable Taxes included;
- the start and completion date of the task (as last revised, as applicable); and
- the active status (i.e., the percentage of the work completed) of the task (as last revised, as applicable) with an explanation (as applicable).

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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 cost incurred for all authorized tasks inclusive of any revisions, Applicable Taxes extra;
- the total cost incurred and invoiced for all authorized tasks inclusive of any revisions, Applicable Taxes extra;
- the total amount of Applicable Taxes invoiced for all authorized tasks inclusive of any revisions; and
- the total amount paid for all authorized tasks inclusive of any revisions, Applicable Taxes extra.

## **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 (2018-06-21), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

### **7.2.2 Supplemental General Conditions**

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

### **7.2.3 Inspection and Acceptance**

The Project Authority is the Inspection Authority. All reports, deliverable items, documents, goods and all services rendered under the Contract are subject to inspection by the Inspection Authority or representative. Should any report, document, good or service not be in accordance with the requirements of the Statement of Work and to the satisfaction of the Inspection Authority, as submitted, the Inspection Authority will have the right to reject it or require its correction at the sole expense of the Contractor before recommending payment.

## **7.3 Security Requirement**

There are no security requirements with this requirement.

## **7.4 Term of Contract**

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

The period of the Contract is from date of Contract Award for a period of 1 (one) year, inclusive.

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#### **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 4 (four) additional 1 (one) year periods 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 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 Comprehensive Land Claims Agreements (CLCAs)**

The Contract does not include deliveries of services within locations within: Yukon, Northwest Territories, Nunavut, Quebec, or Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirements for deliveries of services within locations within: Yukon, Northwest Territories, Nunavut, Quebec, or Labrador that are subject to CLCAs will have to form part of a separate contract.

### **7.5 Authorities**

#### **7.5.1 Contracting Authority**

The Contracting Authority for the Contract is:

Name: Mark Hall  
Title: Supply Specialist  
Public Works and Government Services Canada  
Acquisitions Branch

Address: 10 Wellington St., Gatineau, QC  
Telephone: 613-858-8626  
E-mail address: [mark.hall@pwgsc-tpsgc.gc.ca](mailto:mark.hall@pwgsc-tpsgc.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 for the Contract is:

(To be filled in at time of contract award.)

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.

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### 7.5.3 Contractor's Representative

The Contractor's Representative for the Contract is:

(Filled in at time of contract award.)

## 7.6 Payment

### 7.6.1 Basis of Payment

#### A. Authorized travel and living expenses

Concerning the requirements to travel described in section 10 of the Statement of Work in Annex A, the Contractor will be paid for its authorized travel and living expenses reasonably and properly incurred in the performance of the Work done, delivered or performed outside of the NCR, the Greater Toronto Area, the Greater Montreal Area and Kingston (ON) as applicable, at cost, without any allowance for profit and administrative overhead, in accordance with the meal and private vehicle expenses provided in Appendices B, C and D of the [National Joint Council Travel Directive](#); and with the other provisions of the directive referring to "travellers", rather than those referring to "employees", to a limitation of expenditure of \$\_\_\_\_\_. Customs duty are included and Applicable Taxes are extra.

Canada will not accept travel and living expenses that may need to be incurred by the Contractor for any relocation of resources required to satisfy its contractual obligations.

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.

#### B. Authorized TA

##### i) TA subject to a Limitation of Expenditure

The Contractor will be paid for its costs reasonably and properly incurred in the performance of the Work specified in the authorized TA in accordance with the basis of payment 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.

### 7.6.2 Canada's Total Liability

#### 7.6.2.1 Authorized travel and living expenses

A. Canada's total liability to the Contractor under the Contract for authorized travel and living expenses must not exceed \$\_\_\_\_\_. Customs duties are included and the Applicable Taxes are extra.

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#### **7.6.2.2 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 \$ \_\_\_\_\_ (to be inserted at contract award). 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 requested in all authorized TAs inclusive of any revisions, the applicable basis of payment of which is limitation of expenditure contract clause 7.6.1 B.i, 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 Method of Payment**

One or both of the following methods of payment will form part of the authorized TA subject to a limitation of expenditure, as applicable;

SACC Manual Clause H1000C (2008-05-12), Single Payment  
SACC Manual Clause H1008C (2008-05-12), Monthly Payments

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

*Bidder Note: the text below will include the electronic payment instruments selected by the bidder, as indicated in its bid.*

The Contractor accepts to be paid using any of the following Electronic Payment Instruments:

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

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### **7.6.5 Discretionary Audit**

C0705C (2010-01-11), Discretionary Audit

### **7.6.6 Time Verification**

C0711C (2008-05-12), Time Verification

## **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. One (1) copy must be forwarded to the Project Authority listed in the Contract for certification and payment; and
- b. One (1) copy must be sent to the Contracting Authority at the following email address:

[TPSGC.FacturationZH-ZHInvoicing.PWGSC@tpsgc-pwgsc.gc.ca](mailto:TPSGC.FacturationZH-ZHInvoicing.PWGSC@tpsgc-pwgsc.gc.ca)

## **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 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](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#) website (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#>). The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

Solicitation No. - N° de l'invitation  
08B62-170553/A  
Client Ref. No. - N° de réf. du client  
08B62-170553

Amd. No. - N° de la modif.  
File No. - N° du dossier  
xxxxx. 08B62-170553

Buyer ID - Id de l'acheteur  
XXXXX  
CCC No./N° CCC - FMS No./N° VME

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## 7.9 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in \_\_\_\_\_. (*Bidder Note: the name of the province or territory as specified by the Bidder in its bid will be inserted here.*)

## 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), Supplemental General Conditions - Canada to Own Intellectual Property Rights in Foreground Information ;
- (c) the general conditions 2035 (2018-06-21), General Conditions - Higher Complexity - Services;
- (d) Annex A, Statement of Work;
- (e) Annex B, Basis of Payment;
- (f) the signed Task Authorizations (including all of its annexes, if any); and
- (g) the Contractor's bid dated \_\_\_\_\_.

## 7.11 Foreign Nationals

SACC Manual clause A2001C (2006-06-16), Foreign Nationals (Foreign Contractor)  
SACC Manual clause A2000C (2006-06-16), Foreign Nationals (Canadian Contractor)

## 7.12 Insurance

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.

## 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 total cost of the event that was delayed or missed, as outlined in the Task Authorization. The total amount of the liquidated damages must not exceed the amount of the Task Authorization for the event.

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 of Learning for International Affairs and Management (CFSD) of the Canadian Foreign Service Institute (CFSI) of Foreign Affairs, Trade & Development Canada (DFATD) provides learning services and products in International Affairs (diplomacy, trade, international assistance) as well as in Leadership (including organizational development and coaching) in order to improve individual and organizational performance in support of DFATD, government departments and other Canadian organizations involved in international relations, by providing a common base of skills and knowledge required to deliver on their mandates.

In order to support the provision of these services, CFSD has a requirement to engage the services of a qualified Contractor to provide a variety of international affairs and leadership learning program coordination, facilitation, development, administration 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 CFSD, are authorized to recover the costs of providing services to other government departments, other levels of government, para-public agencies, and the for-profit and not-for-profit organizations and private sector.

Under the cost recovery authority, CFSD is required to recover all costs associated with the delivery of a service. CFSD 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**

CFSD provides a range of services to DFATD and Other Government Departments (OGDs). These services may be provided to federal, provincial and municipal government departments, institutions, associations, private-sector companies, non-governmental organizations and individuals.

#### **1.3 Learning Events**

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

Events may be led by facilitators who, through a combination of education, work and life experiences are qualified in the field of international affairs and/or leadership development. Many events also require the utilization of Subject Matter Experts (SMEs).

The SMEs are critical to the provision of the high quality CFSD services related to specific international issues that the learners are required to understand, and the international and leadership skills and competencies they are required to develop and apply. Other subject matter experts who poses expertise in specific cross-cutting areas (e.g. environment protection) may from time-to-time be used to address specific sector or content areas required to address a client's needs.



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## **2.0 OBJECTIVE**

CFSD requires the services of a qualified Contractor capable of providing services in nine (9) main areas as defined in detail herein. These nine (9) areas of work may broadly be described as:

### **2.1 Learning Event Administrative Services:**

Includes, but is not limited to, the following:

- liaising with CFSD 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, and subject matter experts, (when required)
- preparing learning materials;
- arranging catering and hospitality; and
- tracking and reimbursement of expenses incurred by event participants, facilitators and subject matter experts.

### **2.2 Learning Event Delivery and Facilitation:**

Includes, but is not limited to, the following:

- liaising with CFSD personnel;
- reviewing the learning needs assessment;
- reviewing learning event objectives and content prior to delivery;
- liaising with subject matter experts; delivery of the event in keeping with CFSD standards;
- providing post-event reports; and
- following up with the CFSD Project Authority or his/her delegated representative.
- Co-design and facilitation/co-facilitation when required.

### **2.4 Learning Event Design and Development:**

Includes, but is not limited to, the following:

- conducting needs analyses;
- designing learning events based on the needs analysis and the advice and feedback of the CFSD Project Authority or his/her delegated representative;
- developing learning events based on the preliminary design and the advice and feedback of the CFSD Project Authority or his/her delegated representative;
- updating and/or adapting existing instructional design materials; and
- adhering to CFSD's instructional design methodology, quality standards, service evaluation and quality control requirements.

### **2.5 Learning Product Design and Development:**

Includes, but is not limited to, the following:

- 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

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- Web Design, Development and Management: Includes the design, development and maintenance of web publishing products, online assessment tools, and electronic communication products in support of CFSD 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.
- 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 and supplementary reading for learning events, in both official languages.

#### 2.6 Research and Advisory Services related to Learning:

Includes, but is not limited to, the following:

- liaising with CFSD personnel;
- performing high-level needs analyses and providing advice and solutions related to all aspects of international affairs and leadership learning;
- research of best practices and new approaches and technologies for learning;
- assisting CFSD staff on research projects in the area of international diplomacy, development, trade, and leadership development;
- design of survey instruments; and
- qualitative and quantitative data collection and analysis.

#### 2.7 Leadership Coaching and Self-Assessment Services:

Includes, but is not limited to, the following:

- liaising with CFSD personnel;
- reviewing participants needs assessment;
- administering self-assessment instruments (including EQ-I, MBTI, DISC, Change Management Self-Assessment, Communication Styles, etc.) individually or in a group setting;
- delivering a feedback session following the results of the self-assessments; and
- delivering coaching sessions to identified employees as part of their leadership development.

#### 2.8 Organizational Development (OD) Design and Facilitation

Includes, but is not limited to, the following:

- contributing to and reviewing needs analysis (e.g. surveys, individual interviews, focus groups, etc.);
- contributing to the design based on the needs analysis and the advice and feedback of the CFSD Project Authority or his/her delegated representative;
- delivering process facilitation events based on the preliminary design and the advice and feedback of the CFSD Project Authority or his/her delegated representative;
- updating and/or adapting existing organizational development design materials; and
- adhering to CFSD's instructional design methodology when training modules are required to be included as part of an OD event, quality standards, service evaluation and quality control requirements.

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### 3.0 SCOPE OF WORK

Specific Task Authorizations will be issued as project requirements identified by CFSD, 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.

#### 3.1 Learning Event Administrative Services

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, but not limited to, the following:

- a) Maintain a current, accurate and comprehensive electronic record for each learning event including but not limited to: event title and number, CFSD client, start and end dates, duration, number of participants (including the number of traveling participants), gender of participants (if required), facilitator(s), subject matter expert(s), language of delivery, location of delivery, logistical data, and financial data;
- b) Coordinate and administer each learning event by carrying out the following activities:
  - Assess the requirements outlined in the Task Authorization Form;
  - In consultation with and subject to prior agreement by the CFSD Project Authority or his/her delegated representative, select and assign facilitators and/or subject matter experts to events;
  - Where required, make travel and accommodation arrangements for facilitators, participant and/or subject matter experts in accordance with Treasury Board policies and CFSD directives;
  - Register event participants, obtain and record participant information, provide participant information to CFSD and the event facilitator, and respond to participant questions regarding registration and the learning event (the nature of registration varies depending on the CFSD client);
  - Collect participant learning needs assessment information using forms provided by the CFSD 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, subject matter experts, and ensure that print documents are prepared and delivered according to CFSD norms and deadlines specified in the Task Authorization;
  - Coordinate and ensure the timely provision of post-event reports if required by CFSD, including facilitator reports, participant evaluations (compiled if required), coordination and follow-up reports, and financial reports;
  - Review expense reports and claims for traveling participants, facilitators, subject matter experts for accuracy and administer them in accordance with Treasury Board policies and CFSD directives using CFSD-provided templates. 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 CFSD and providing a separate invoice to CFSD for the reimbursement of participant expense claims); and

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- c) Adhere to the service evaluation and quality control requirements established by CFSD or specified in the Task Authorization, and ensure that all of its resources adhere to CFSD's service standard and quality monitoring activities; and
- d) Ensure that all services provided to Government of Canada employees conform to Treasury Board and DFATD 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);
- e) Maintain at all times current knowledge of CFSD's products and services and CFSD's clients' mandates, business lines, and service and program delivery mechanisms; and
- f) 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, but not limited to, the following:

- a) Liaise with the CFSD 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:
  - 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 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.

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- 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 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 CFSD or specified in the Task Authorization (CFSD follows the standards of the adult education and experiential methodologies such as, but not limited to, St. Francis Xavier University Diploma in Adult Education for training event design delivery, and the Kirkpatrick model for training evaluation);
- s) Report immediately to the CFSD Project Authority or his/her delegated representative any problems with a participant or client relations;
- t) Provide the participants with course certificates, if applicable, upon completion of the learning event;
- u) Be available for up to thirty (30) minutes at the end of the day to answer questions from participants;
- v) Submit the learning event evaluations, if applicable, to the CFSD Project Authority or his/her delegated representative within two (2) calendar days of event delivery;
- w) Submit the signed attendance lists, if applicable, to the CFSD Project Authority or his/her delegated representative within two (2) calendar days of event delivery;
- x) Where and if required, inform the CFSD 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

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- y) Perform other related learning event delivery and facilitation services, as specified in a Task Authorization Form.

Subject matter experts typically contribute to learning events for a full day or more. These learning events tend to be delivered to groups of participants, on average 15-30, or as many as 250. The format may include a presentation or an interactive learning activity. In some instances, the subject matter experts are expected to provide thematic or sectoral knowledge on a particular international issue, behavioral or functional competency, such as leadership in the international context.

### 3.3 Learning Event Design and Development

The Contractor must, as-and-when-requested, provide the services of designers and developers to carry out learning event design and development by performing the following activities:

- a) Perform a learning needs analysis which may involve:
- meeting with stakeholders to determine what issues or performance gaps 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.;
  - identifying and analyzing key internal and external documents and key programs, policies, processes which would provide context for any learning event;
  - developing interview guides, conducting interviews with focus groups, stakeholders or experts analyzing and reporting results of interviews;
  - analyzing 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;
  - identifying preliminary performance objectives, critical subject matter or competencies to be developed;
  - creating a detailed evaluation framework, including measures of achievement; and
  - delivering 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 behaviors required to successfully meet the challenges.
- b) Designing a learning event based on the needs analysis report and the advice and feedback of the CFSD 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, and/or subject matter experts recommended for activities;

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- 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 CFSD 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 design. Materials may include lesson plans, exercises, participants' notes and the content of PPT 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 CFSD's instructional design methodology and quality standards;
- g) Adhering to any service evaluation and quality control requirements established by CFSD or specified in the Task Authorization, and ensure that all of its resources adhere to CFSD's service standard and quality monitoring activities; and
- h) Performing other related learning event design and development services, as specified in a Task Authorization.

### 3.4 Learning Product Design and Development

#### 3.4.1 Project Management

The Contractor must, as-and-when-requested, provide the services of a Project Manager for the design and development of learning products who may be required to, but not be limited to, perform the following activities:

- a) Manage the design, development and maintenance of e-learning products, web products, 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:
- act as the primary point of contact between CFSD and Contractor resources;
  - liaise and collaborate with DFATD's Information Management and Technology Bureau, as required;
  - determine the project scope, including budget, deliverables; and timelines;



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- validate the project scope with the appropriate CFSD authority;
  - develop and update detailed project plans;
  - source subject matter experts, as required;
  - document technical requirements;
  - assign specific deliverables to resources;
  - manage the design and development of deliverables;
  - track project plans and manage resources;
  - monitor and control projects to ensure they remain on budget and to ensure on-time delivery and client satisfaction;
  - manage risks and implement problem resolutions;
  - balance resources and workload across various projects to optimize resource allocation;
  - ensure accurate and complete documentation provided for all deliverables (technical and any required user documentation);
  - plan, organize, and ensure quality assurance of deliverables;
  - develop, in consultation with CFSD authorities, an approach to ensure high quality translation of deliverables;
  - manage accurate internal project reporting;
  - manage client communications and reporting; and
  - obtain sign-offs on projects and milestones.
- b) Manage the human resource needs of the Contractor team members in relation to a Task Authorization, which could include instructional designers, writers, text editors, subject matter experts, graphic 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) Support 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) Provide on-going and as required assistance and direction to team members and CFSD representatives in regard to the development of e-learning, media, web, database applications, print products and other learning support services required by CFSD; and
- e) Providing other related services, as specified in the Task Authorization form.

#### 3.4.2 Instructional Design – E-Learning Products

The Contractor must, as-and-when-requested, provide instructional design services of qualified resources for the design and development of learning products who may be required to carry out the following activities:

- a) Project Definition:
- conduct a needs analysis by assessing business/learning requirements;
  - validate learning outcomes with CFSD or CFSD clients;



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- 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;
  - 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.

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- 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 CFSD and identified in a Task Authorization.

#### 3.4.3 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 CFSD, and submit these to the CFSD Project Authority or his/her delegated representative for review;
- c) Undertake necessary revision and editing of the documents, according to the requirements of CFSD 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 CFSD 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.

#### 3.4.4 Editing (Text)

The Contractor must, as-and-when-requested, provide editing services of qualified resources 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;

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- 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 CFSD'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; and
- i) Provide other related services, as required.

#### 3.4.5 Graphic Design

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

- a) Consult with CFSD 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 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 CFSD 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 CFSD; and
- f) Provide other related services, as required.

#### 3.4.6 Web Design and Development

The Contractor must, as-and-when-requested, provide the services of qualified web designers and developers 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, and similar projects;

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- 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 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 CFSD 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; and
- k) Providing other related services, as required.

#### 3.4.7 E-Learning Designer and Developer

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 CFSD 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;

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- 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.

#### 3.4.8 Media Production

Working under the guidance of the 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 CFSD Project Authority or his/her delegated representative to publish information on the Internet, intranet, standalone or similar environments;
- h) Collaborate with the CFSD Project Authority or his/her delegated 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 Research and Advisory Services related to Learning

The Contractor must, as-and-when-requested, provide researchers and analysts to support CFSD research and development projects. CFSD 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:

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3.5.1 Senior Level Researchers may be requested to carry out, but not be limited to, the following activities:

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

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- k) Design and carry out level 3 evaluations of learning events or programs.
- l) Perform other related research and strategic advisory services, as specified in a Task Authorization.

3.5.2 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

3.5.3 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

### 3.6 Leadership Coaching and Self-Assessment Services

The Contractor must, as and when requested, for each Organizational Development event, provide the services of qualified coaches and facilitators to deliver coaching services, administer self-assessment instruments and provide related feedback including the following:

- a) Liaise with the CFSD Project Authority or his/her delegated representative regarding any event-specific requirements;
- b) Review individual needs assessments provided by CFSD;
- c) Liaise with the participants to establish the parameters of the coaching session;
- d) Determine in consultation with the CFSD Project Authority or their delegate whether a self-assessment instrument is required. If deemed required administer the assessment;
- e) Deliver the feedback session following the self-assessment;
- f) Deliver coaching session(s) as required and approved by CFSD;
- g) Provide the participant with a list of additional resources, if required;
- h) Debrief with the CFSD representative about the session completion and the next steps if required; and
- i) In all steps related to individual coaching and feedback ensure confidentiality of private information.

### 3.7 Organizational Development (OD) Design and Facilitation

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

- a) Liaise with the CFSD Project Authority or his/her delegated representative regarding any event-specific requirements;
- b) Review the organizational needs assessment provided by CFSD;
- c) Contribute to or design the facilitation 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 and/or facilitation 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 OD event outlining the location of fire exits, washrooms, lunchroom and other relevant administrative issues;
- h) Create an environment that is conducive to adult learning and to the effective group interaction by respecting the following principles:
  - 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 because of his/her personal and professional experiences;
  - The adult, when registering to a learning activity, is motivated by a goal, an objective, the activity and the anticipated learning; and
  - Facilitate the development of Group Ground Rules for a safe and respectful environment.
- 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 event, find answers during or after the event by asking them to subject matter experts and communicate answers to CFSD representative to be forwarded to the event participants;



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- n) Make connections between 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 event, if applicable, is appropriate to the learning needs specified in the learning design;
- r) Ensure that the delivery of all OD events adheres to standards established by CFSD or specified in the Task Authorization;
- s) Report immediately to the CFSD Project Authority or his/her delegated representative any problems with a participant or client relations;
- t) Distribute evaluation forms, if applicable, to participants and gather them at the end of the event and provide copies of the evaluation to CFSD Project Authority or his/her delegated representative;
- u) Be available for up to thirty (30) minutes at the end of the day to answer questions from participants;
- v) Submit the learning event evaluations, if applicable, to the CFSD Project Authority or his/her delegated representative within two (2) calendar days of event delivery;
- w) Inform the CFSD 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
- x) Perform other related delivery and facilitation services, as specified in a Task Authorization Form.

### 3.8 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.

#### 3.8.1 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.

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

#### 3.8.2 Classroom specifications and requirements:

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

3.8.3 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;

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

- a) A common area is required with a phone line, and appropriate furnishings;
- b) Kitchenette area with fridge, microwave, sink, coffee machine, and a water cooler;
- c) A reception area with training coordinator services during business hours; and
- d) 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 If required by CFSD, Participant Event Evaluation Reports, used to evaluate the event content, materials and performance of the individual facilitators and/or subject matter experts at meeting the objectives from the participants' perspective. The Event Evaluation forms are provided by CFSD to the Contractor to be distributed to and gathered from event participants. Event evaluation reports are to be delivered by the Contractor to the CFSD 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 If required by CFSD, Facilitator Event Evaluation Reports, used to evaluate the event content, materials and performance of the individual facilitators 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 CFSD Project Authority or his/her delegated representative in charge of the event delivery within forty eight (48) hours of the event delivery. Requirements for the Contractor to collate evaluation reports will be identified in Task Authorization forms.
- 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 after each delivery of a learning event or program.

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- 4.4 Additional reports on other matters relevant and 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 CFSD 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 CFSD Project Authority regularly on issues related to confidentiality, privacy, communications and ownership of findings and reports.
- 5.3 Manage the delivery of services to CFSD in accordance with all service models that may be provided to the Contractor by CFSD. 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. CFSD, 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 that meetings are held with the CFSD 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 CFSD'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.

## **6.0 DFATD SUPPORT TO THE CONTRACTOR**

- 6.1 CFSD will ensure that appropriate subject matter experts from within CFSD 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 If and when required, DFATD will provide the Contractor's resources work stations, telephones, SIGNET-connected computers, and approved software, information subscriptions, printers and

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supplies (paper, covers, etc.) at its Bisson facility. As required, CFSD will also 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 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 CFSD 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 CFSD Task Authorizations. Modes of communication may include: phone calls, videoconference, electronic mail, faxes, mailings, and meetings. In addition, the Contractor is to immediately notify the CFSD 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.
- 8.2 All resources must meet the stated minimum qualifications stated below in order to deliver service to CFSD 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 CFSD (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. The response must include the identification of proposed resources (including current CVs for new resources), costs, deliverables and dates for deliverables. When required, 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.
- 8.3 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 CFSD. 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:

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Table A-1.1

<b>Resource Category</b>	<b>Minimum Qualifications</b>
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 CFSD learning materials in the last five (5) years; and</p> <p>Fluency in either French or English.</p>
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 leadership; OR</p> <p>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 in the areas of international affairs and/or leadership, organizational development and related learning events to adults.</p> <p>Demonstrate either:</p> <p>Sixty (60) days of facilitation experience in the field of international affairs OR leadership in the last two (2) years, OR</p> <p>One hundred fifty (150) days of facilitation experience in the field of international affairs OR leadership in the last ten (10) years, including at least seventy five (75) days during the last five (5) years;</p> <p>Fluency in English or French. Bilingual individuals are preferred.</p>

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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>
Instructional Designer – e-Learning	<p>The Instructional Designer – e-Learning 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) e-Learning resources, in the past five (5) years.</p> <p>Fluency in both French and English.</p>
Writer	<p>The Writer must have, at a minimum, the following qualifications: 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:</p> <p>Demonstrate either:</p> <p>A degree in French, English, Journalism, or Linguistics, from a recognized institution; OR</p> <p>five (5) years' experience providing editing services consistent with DFATD'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:</p> <p>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</p> <p>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</p> <p>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>

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E-Learning Designer and Developer	<p>The E-Learning Designer and Developer 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, 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>
Database Developer and Administrator	<p>The Database Developer/Administrator 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, 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>



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Media Producer	<p>The Media Producer must have, at a minimum, the following qualifications:</p> <p>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 international diplomacy, development, trade, leadership 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>
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;</p> <p>Ten (10) assignments or projects providing research and/or strategic analysis services related to learning in the last ten (10) years;</p> <p>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;</p> <p>Five (5) assignments or projects providing research and/or strategic analysis services related to learning in the last five (5) years;</p> <p>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;</p> <p>Three (3) years' experience performing data entry and processing related data;</p> <p>Fluency in French or English.</p>

## 9.0 SERVICE STANDARDS

CFSD 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 CFSD's clients' satisfaction and in accordance with the established standards, as stated in the Contract and Task

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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 CFSD clients, CFSD 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 CFSD's instructional design methodology and quality standards established or deemed acceptable by CFSD; 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 may also be required to provide services at CFSD's Bisson Campus in Gatineau, Quebec. The Contractor may also be 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 primarily in the National Capital Region and, on occasion, 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 CFSD Project Authority or his/her delegated representative in accordance with criteria established by or deemed acceptable to CFSD.

### **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 CFSD learning event, or a subject matter expert is required to travel to contribute to a learning event in a location specified in an individual Task Authorization form, CFSD 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 CFSD authority.

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.

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### 10.3 Time of Work

It is anticipated that approximately 90% of learning events will be delivered Monday to Friday and up to 10% of learning events may be 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, CFSD 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 CFSD is in the preferred language of the CFSD 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 DFATD language scales.

For more information regarding the DFATD 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:

CFSD:	Centre of Learning for International Affairs and Management (refer to website below for an overall description)
CFSI:	Canadian Foreign Service Institute
CIISD:	Canadian and International Industrial Security Directorate
DFATD:	Foreign Affairs, Trade & Development 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

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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 international diplomacy, development, trade, leadership or related services facilitation, organizational development, and research and development.

**Event:** Overarching term for any activity (course, program, briefing, workshop sessions, and 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 CFSD 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**

Canadian Foreign Service Institute:  
<http://www.international.gc.ca/ifait-iaeci/index.aspx?lang=eng>

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)

DFATD Home Page:  
<http://www.international.gc.ca>

DFATD 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)

Definitions of the National Zone, Regions and Metropolitan Areas  
<http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/dznrrm-dnzrma-eng.html>

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## ANNEX B, BASIS OF PAYMENT

### A- Contract Period (From \_\_\_\_ to \_\_\_\_ )

During the period of the Contract, for Work performed in accordance with the Contract, the Contractor will be paid as specified below.

#### 1.0 Professional Fees

The Contractor will be paid all inclusive firm unit rates as follows:

Category	Initial Period	Opt Period 1	Opt Period 2	Opt Period 3	Opt Period 4
	Firm Unit Rate	Firm Unit Rate	Firm Unit Rate	Firm Unit Rate	Firm Unit Rate

For the purpose of this Contract, a day is defined as 7.5 hours of work, exclusive of meal breaks. Payment will 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 all inclusive fixed daily rate must be prorated to reflect the actual time worked.

**Total Estimated Cost of Professional Fees: \$\_\_\_\_\_** (to be inserted at contract award)

#### 2.0 Cost Reimbursable Expenses

##### 2.1 Authorized travel and living expenses for Work

Concerning the requirements to travel described in section 10 of the Statement of Work in Annex A, the Contractor will be paid for its authorized travel and living expenses reasonably and properly incurred in the performance of the Work done, delivered or performed outside of the NCR, the Greater Toronto Area, the Greater Montreal Area and Kingston (ON) as applicable, at cost, without any allowance for profit and administrative overhead, in accordance with the meal and private vehicle expenses provided in Appendices B, C and D of the [National Joint Council Travel Directive](#); and with the other provisions of the directive referring to "travellers", rather than those referring to "employees."

Canada will not accept travel and living expenses that may need to be incurred by the Contractor for any relocation of resources required to satisfy its contractual obligations."

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.

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Total Estimated Cost of Authorized Travel and Living Expenses: \$\_\_\_\_\_ (insert amount at contract award)

**3.0 Total Estimated Cost- Contract Period: \$ \_\_\_\_\_** (insert amount at contract award)

With the exception of the all inclusive fixed time rates specified above, the amounts shown in this section of the annex are estimates only. Minor changes to these estimates will be accepted for billing purposes as the Work proceeds, provided that these changes have the prior approval of the Project Authority), and provided that the total estimated cost of the Contract does not exceed the Limitation of Expenditure of the Contract.

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## ANNEX C, TASK AUTHORIZATION FORM

<b>Contract Number:</b>		
<b>Task Authorization (TA) Number:</b>		
<b>Contractor's Name and Address:</b>		
Total Estimated Cost of Task (Applicable Taxes extra) before any revisions:		\$ _____.
<b>TA Revisions Previously Authorized</b>		
TA Revision Number: _____	Authorized Increase or Decrease (Applicable Taxes extra) \$ _____	
TA Revision Number: _____	Authorized Increase or Decrease (Applicable Taxes extra) \$ _____	
TA Revision Number: _____	Authorized Increase or Decrease (Applicable Taxes extra) \$ _____	
TA Revision Number: _____	Authorized Increase or Decrease (Applicable Taxes extra) \$ _____	
TA Revision Number: _____	Authorized Increase or Decrease (Applicable Taxes extra) \$ _____	
<b>New TA Revision</b>		
TA Revision Number: _____	Authorized Increase or Decrease (Applicable Taxes extra) \$ _____	
Total Estimated Cost of Task (Applicable Taxes extra) after this revision:		\$ _____
<b>Required Work</b>		
<b>SECTION A – Task Description of the Work Required</b>		
<b>SECTION B – Applicable Basis of Payment</b>		

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**SECTION C - Cost Breakdown of Task****SECTION D- Applicable Method of Payment****Authorization - Authorization**

**By signing this TA, the Project Authority or the PSPC Contracting Authority or both, as applicable, certify (ies) that the content of this TA is in accordance with the Contract.**

**En apposant sa signature sur cette AT, le chargé de projet ou l'autorité contractante de TPSGC ou, s'il y a lieu, les deux atteste(nt) que le contenu de cette AT respecte les conditions du contrat.**

Name of Project Authority - Nom du chargé de projet \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Name of PSPC Contracting Authority -  
Nom de l'autorité contractante de TPSGC \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

**Contractor's Signature - Signature de l'entrepreneur**

Name and title of individual authorized to sign for the Contractor  
Nom et titre de la personne autorisée à signer au nom de l'entrepreneur  
\_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_



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## **ANNEX D, Sample MS Office Excel Spreadsheet for Period Usage Reports – Contracts with TA's**

<To be inserted at Contract Award>