



**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

| | |
|---|---|
| Title - Sujet Facilitation Services | |
| Solicitation No. - N° de l'invitation 08B62-190370/A | Date 2019-12-03 |
| Client Reference No. - N° de référence du client 20190370 | |
| GETS Reference No. - N° de référence de SEAG PW-\$\$ZH-150-37091 | |
| File No. - N° de dossier 150zh.08B62-190370 | CCC No./N° CCC - FMS No./N° VME |
| Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2020-01-28 | Time Zone Fuseau horaire Eastern Standard Time EST |
| F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/> | |
| Address Enquiries to: - Adresser toutes questions à: Hall, Mark | Buyer Id - Id de l'acheteur 150zh |
| Telephone No. - N° de téléphone (613) 858-8626 () | FAX No. - N° de FAX () - |
| Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: See herein | |

Instructions: See Herein

Instructions: Voir aux présentes

Vendor/Firm Name and Address

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

Issuing Office - Bureau de distribution

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

| | |
|--|--|
| Delivery Required - Livraison exigée See Herein | Delivery Offered - Livraison proposée |
| Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur | |
| Telephone No. - N° de téléphone Facsimile No. - N° de télécopieur | |
| Name and title of person authorized to sign on behalf of Vendor/Firm (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie) | |
| Signature | Date |

| | |
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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 and Point Rated Technical Evaluation Criteria, the Bid Submission Template 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 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) as well as in Global 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. CFSD delivers on average up to 90 courses and 20 complex training programs as well as 40 organizational development workshops averaging between 70 – 150 events annually.

1.2.2 Objective

CFSD has a requirement to engage a qualified Contractor to provide Facilitators on an as-and-requested basis. This often requires a Quick Turnaround in order to respond to the ever changing learning needs of the departmental personnel. These areas of work include the following:

- A) Learning Event Facilitation;
- B) Learning Event Design and Development;
- C) Leadership Coaching, Mentoring, and Self-Assessment Services;
- D) Organizational Development (OD) Event Facilitation;
- E) Organizational Development (OD) Event Design and Development; and
- F) Services of Subject Matter Experts (SMEs).

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- 1.2.3 The requirement is subject to the provisions of: the Canadian Free Trade Agreement (CFTA), the North American Free Trade Agreement (NAFTA) including Canada –Chile, Columbia, Honduras, Panama and Peru FTAs, and the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP).
- 1.2.4 The resulting contract contract will not include deliveries of services within locations within Yukon, Northwest Territorites, Nunavut, Quebec, or Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirements for deliveries of within locations within Yukon, Northwest Territorites, Nunavut, Quebec, or Labrador that are subject to CLCAs will have to be treated as a separate procurement not forming part of the bid solicitation.

1.3 Debriefings

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

PART 2 – BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (<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 (2019-03-04) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 4 of Section 05, Submission of Bids, of Standard Instructions 2003 incorporated by reference above, 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, time and place indicated on page 1 of the bid solicitation.

Note: For bidders choosing to submit using epost Connect for bids closing at the Bid Receiving Unit in the National Capital Region (NCR), the address is:

tpsgc.dgareceptiondessoumissions-abbidreceiving.pwgsc@tpsgc-pwgsc.gc.ca

Note: Bids will not be accepted if emailed directly to this email address. This email address is to be used to open an epost Connect conversation, as detailed in Standard Instructions 2003, or to send bids through an epost Connect message if the Bidder is using its own licensing agreement for epost Connect.

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 the information required in the Attachment 2 to Part 3 - Certifications and Additional Information before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than 20 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

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be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated and the enquiry can be answered to all bidders. Enquiries not submitted in a form that can be distributed to all bidders may not be answered by Canada.

2.5 Applicable Laws

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

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.

PART 3 – BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

a) The bidder must separate its bid as follows:

Section I: Technical Bid
Section II: Financial Bid
Section III: Certifications and Additional Information

This bid solicitation uses Portable Document Format (PDF) technology. To access the PDF form, bidders must have a PDF reader installed. If bidders do not already have such a reader, there are several PDF readers available on the Internet. It is recommended to use the latest version of PDF reader to benefit all features of the interactive forms.

- b) If the Bidder chooses to submit its bid electronically using the [epost Connect service \(https://www.canadapost.ca/cpc/en/business/postal-services/digital-mail/epost-connect.page\)](https://www.canadapost.ca/cpc/en/business/postal-services/digital-mail/epost-connect.page) provided by Canada Post Corporation, please note,
- o Canada requests that the bidder submits its bid in accordance with section 08, Transmission by facsimile or by epost Connect, of the 2003 standard instructions. Sub-section 2, epost connect, contains instructions and conditions;
 - o The epost Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation.
- c) 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.
- d) 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:
- Sections I, II and III: 1 hard copy each and 1 soft copy on USB
- e) 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](#).

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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 and in accordance with the pricing schedule detailed in Attachment 1 to Part 3.
- 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 4.1.3, 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: Canada requests that the Bidder select an Electronic Payment Instrument using Attachment 2 to Part 3 Certifications and Additional Information.

Section III: Certifications and Additional Information

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

- A. Bidders should complete their Certifications and Additional Information by using the PDF fillable form in Attachment 2 to Part 3 - 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.

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ATTACHMENT 1 TO PART 3, PRICING SCHEDULE

The Bidder should complete the attached pricing schedule and include it in its financial bid once completed. See attached MSExcel worksheet titled 'Attachment 1 to Part 3, Pricing Schedule'.

The volumetric data included in the pricing schedule is provided for bid evaluated price determination purposes only. They are not to be considered as a contractual guarantee. Their inclusion in the pricing schedule does not represent a commitment by Canada that Canada's future usage of the services described in the bid solicitation will be consistent with this data.

The rates included in the pricing schedule include the total estimated cost of any travel and living expenses that may need to be incurred for the Work described in Part 7 of the bid solicitation required to be done, delivered or performed outside the National Capital Region (NCR) defined in the National Capital Act (R.S.C., 1985, c. N-4), available on the Justice Website (<http://laws-lois.justice.gc.ca/eng/acts/N-4/page-9.html#docCont>)" or outside a radius of 100 kilometers of the Contractor's place of business, 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".

Under any resulting contract, 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.

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ATTACHMENT 2 TO PART 3
CERTIFICATIONS AND ADDITIONAL INFORMATION

See attached PDF fillable Form - Attachment 2 to part 3 – Certifications and Additional Information.pdf

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

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 (2019-03-04) 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.

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- (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 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 Technical Evaluation

4.1.2.1 Joint Venture Experience

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

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

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

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

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

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

4.1.2.2 Mandatory Technical Evaluation Criteria

Refer to Attachment 1 to Part 4.

The Phased Bid Compliance Process will apply to all mandatory technical evaluation criteria.

4.1.2.3 Point Rated Technical Criteria

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

4.1.3 Financial Evaluation

4.1.3.1 For bid evaluation and Contractor selection purposes only, the total 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 - Highest Combined Rating of Technical Merit and Price

4.2.1 To be declared responsive, a bid must:

- a. comply with all the requirements instructions of the bid solicitation; and
- b. meet all mandatory criteria; and
- c. obtain the required minimum points specified for each criterion for the technical evaluation, and
- d. obtain the required minimum of 84 / 120 points overall. The technical evaluation criteria are subject to point rating.

4.2.2 Bids not meeting (b) Mandatory Criteria will be declared non-responsive and no further consideration will be given. Bids not meeting (d) will be declared non-responsive.

4.2.3 The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 60% for the technical merit and 40% for the price.

4.2.4 To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 60%.

4.2.5 To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 40%.

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

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

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 60/40 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$45,000 (45).

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Basis of Selection - Highest Combined Rating Technical Merit (60%) and Price (40%)

| | | Bidder 1 | Bidder 2 | Bidder 3 |
|--------------------------------|------------------------------|-----------------------------|----------------------------|----------------------------|
| Overall Technical Score | | 115/135 | 89/135 | 92/135 |
| Bid Evaluated Price | | \$55,000.00 | \$50,000.00 | \$45,000.00 |
| Calculations | Technical Merit Score | $115/135 \times 60 = 51.11$ | $89/135 \times 60 = 39.56$ | $92/135 \times 60 = 40.89$ |
| | Pricing Score | $45/55 \times 40 = 32.73$ | $45/50 \times 40 = 36.00$ | $45/45 \times 40 = 40.00$ |
| Combined Rating | | 83.84 | 75.56 | 80.89 |
| Overall Rating | | 1st | 3rd | 2nd |

ATTACHMENT 1 TO PART 4, TECHNICAL EVALUATION CRITERIA

1.0 Mandatory Technical Criteria

- a) Bidder's must use Attachment 2 to Part 4, Bid Submission Template to respond to each Mandatory and Rated Criterion.
- b) The Technical Bid must meet the mandatory technical criteria specified in table below. The Bidder must provide the necessary documentation to support compliance.
- c) Any Bid which fails to meet the mandatory technical criteria will be declared non-responsive. Each mandatory technical criterion should be addressed separately.
- d) In the case of a joint venture, at least one member of the joint venture must meet the mandatory technical criteria. The Bidder must indicate which member of the joint venture it uses for each mandatory technical criterion.
- e) In the case of a joint venture, the parties forming the joint venture cannot combine their experience in order to meet any one of the mandatory technical criteria.
- f) It is the Bidder's responsibility to insert into the column to the right, the cross-reference to their Bid submission as to where the Evaluators can find the substantiation for the Bidder's response.

| Number | Description of Criteria | Bid Preparation Instructions | Bidder's Cross References |
|--------|---|---|---------------------------|
| MT1 | <p>Through *Completed Events, the Bidder must demonstrate they have billed a minimum cumulative value of \$250,000 (in Canadian dollars, Applicable Taxes excluded) and been in business for a minimum of three years prior to the bid solicitation publication date providing Facilitators to **Outside Clients.</p> <p>*A Completed Event is defined as an event where the outcome or actual results were achieved and all deliverables have been submitted to the Outside Client.</p> <p>**Outside Client refers to a client that is external to the Bidder's organization. Parent companies, affiliates, and subsidiaries are considered internal.</p> | <p>In order to demonstrate this, the Bidder must provide the following for each event:</p> <ol style="list-style-type: none"> a) Name of Event; b) Event Summary; c) Time Period (mm/yyyy to mm/yyyy); d) Dollar value billed; e) Client Name; f) Contact Name; g) Telephone number of Contact; and h) E-mail address of Contact. | |

| Number | Description of Criteria | Bid Preparation Instructions | Bidder's Cross References |
|------------|--|---|---------------------------|
| MT2 | <p>The Bidder must provide details of at least (20) twenty *Completed Events where it has provided Facilitators for Learning Events within the last (2) two years prior to the Bid Closing Date to **Outside Clients.</p> <p>*A Completed Event is defined as an event where the outcome or actual results were achieved and all deliverables have been submitted to the Outside Client.</p> <p>**Outside Client refers to a client that is external to the Bidder's organization. Parent companies, affiliates, and subsidiaries are considered internal.</p> | <p>Canada reserves the right to verify information with the client. These contacts must be reachable for verification purposes.</p> <p>The following must be provided for each event:</p> <ul style="list-style-type: none"> a) Name of Event; b) Event Summary; c) Time Period (mm/yyyy to mm/yyyy); d) Client Name; e) Contact Name; f) Telephone number of Contact; and g) E-mail address of Contact. <p>Canada reserves the right to verify information with the client. These contacts must be reachable for verification purposes.</p> | |
| MT3 | <p>The Bidder must provide details of at least (20) twenty *Completed Events where it has provided Facilitators to design and develop Learning Events within the last (2) two years prior to the Bid Closing Date to **Outside Clients.</p> <p>*A Completed Event is defined as an event where the outcome or actual results were achieved and all deliverables have been submitted to the Outside Client.</p> <p>**Outside Client refers to a client that is external to the Bidder's organization. Parent companies, affiliates, and subsidiaries are considered internal.</p> | <p>In order to demonstrate this, the Bidder must provide the following for each event:</p> <ul style="list-style-type: none"> a) Name of Event; b) Event Summary; c) Time Period (mm/yyyy to mm/yyyy); d) Client Name; e) Contact Name; f) Telephone number of Contact; and g) E-mail address of Contact. <p>Canada reserves the right to verify information with the client. These contacts must be reachable for verification purposes.</p> | |

| Number | Description of Criteria | Bid Preparation Instructions | Bidder's Cross References |
|------------|--|---|---------------------------|
| MT4 | <p>Leadership Coaching, Mentoring and Psychometric Assessment Services</p> <p>The Bidder must provide details of at least (20) twenty *completed individualized sessions where it has provided Resources <u>who are certified in various psychometric tools for Leadership Coaching and Psychometric Assessments</u> (such as, but not limited to: EQi, MBTI, Insights etc.) as well as resources for Mentoring services for multiple **Outside Clients within the last (2) two years prior to the Bid Closing Date.</p> <p>The Bidder's response must contain a minimum of (1) one example in each of Leadership Coaching, Mentoring, and Psychometric Assessment Services.</p> <p>*A completed event is defined as an event where the outcome or actual results were achieved and all deliverables have been submitted to the Outside Client.</p> <p>**Outside client refers to a client that is external to the Bidder's organization. Parent companies, affiliates, and subsidiaries are considered internal.</p> | <p>In order to demonstrate this, the Bidder must provide the following for each service:</p> <ul style="list-style-type: none"> a) Service Provided (Leadership Coaching, Mentoring and/or Psychometric Assessment); b) Session Summary (including certification obtained, if applicable); c) Time Period (mm/yyyy to mm/yyyy); d) Client Name; e) Contact Name; f) Telephone number of Contact; and g) E-mail address of Contact. <p>Canada reserves the right to verify information with the client. These contacts must be reachable for verification purposes.</p> | |
| MT5 | <p>The Bidder must provide details of at least (10) ten *Completed Events where it has provided Facilitators for Organizational Development (OD) Event Facilitation, within the last (2) two years prior to the Bid Closing Date to **Outside Clients.</p> | <p>In order to demonstrate this, the Bidder must provide the following for each event:</p> <ul style="list-style-type: none"> a) Name of Event; b) Event Summary; c) Time Period (mm/yyyy to mm/yyyy); | |

| Number | Description of Criteria | Bid Preparation Instructions | Bidder's Cross References |
|------------|--|---|---------------------------|
| | <p>*A completed event is defined as an event when the outcome or actual results were achieved and all deliverables have been submitted to the Outside Client.</p> <p>**Outside client refers to a client that is external to the Bidder's organization. Parent companies, affiliates, and subsidiaries are considered internal.</p> | <p>d) Client Name; e) Contact Name; f) Telephone number of Contact; and g) E-mail address of Contact.</p> <p>Canada reserves the right to verify information with the client. These contacts must be reachable for verification purposes.</p> | |
| MT6 | <p>The Bidder is requested to provide details of at least (10) ten *Completed Events where it has provided Facilitators for Organizational Development (OD) Event Design and Development, within the last (2) two years prior to the Bid Closing Date to **Outside Clients.</p> <p>*A completed event is defined as an event where the outcome or actual results were achieved and all deliverables have been submitted to the Outside Client.</p> <p>**Outside client refers to a client that is external to the Bidder's organization. Parent companies, affiliates, and subsidiaries are considered internal.</p> | <p>In order to demonstrate this, the Bidder must provide the following for each event:</p> <p>a) Name of Event; b) Event Summary; c) Time Period (mm/yyyy to mm/yyyy); d) Client Name; e) Contact Name; f) Telephone number of Contact; and g) E-mail address of Contact.</p> <p>Canada reserves the right to verify information with the client. These contacts must be reachable for verification purposes.</p> | |
| MT7 | <p>The Bidder must provide details of at least (20) twenty *Completed Events where it has provided Subject Matter Experts to provide presentations at events, within the last (2) two years prior to the Bid Closing Date to **Outside Clients.</p> <p>*A Completed Event is defined as an event where the outcome or actual results were achieved and all deliverables have been submitted to the Outside Client.</p> | <p>In order to demonstrate this, the Bidder must provide the following for each event:</p> <p>a) Name of Event; b) Event Summary; c) Time Period (mm/yyyy to mm/yyyy); d) Client Name;</p> | |

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|--------|---|---|---------------------------|
| | <p>**Outside Client refers to a client that is external to the Bidder's organization. Parent companies, affiliates, and subsidiaries are considered internal.</p> | <p>e) Contact Name; f) Telephone number of Contact; and g) E-mail address of Contact.</p> <p>Canada reserves the right to verify information with the client. These contacts must be reachable for verification purposes.</p> | |

2.0 Point Rated Technical Criteria

- Bids which meet all the mandatory technical criteria will be further evaluated and scored as specified in the tables below.
- Bids which fail to obtain the required minimum number of points specified will be declared non-responsive. The required overall pass mark is **70% or 84 points.**
- Each point rated technical criterion should be addressed separately.
- It is the Bidder's responsibility to insert into the column to the right, the cross-reference to their Bid submission as to where the Evaluators can find the substantiation for the Bidder's response.

Summary of Point Rated

| | Category | Maximum Technical Points Available |
|----|--|------------------------------------|
| R1 | Learning Event Facilitation | 15 |
| R2 | Learning Event Design and Development | 15 |
| R3 | Leadership Coaching, Mentoring, and Self-Assessment Services | 15 |
| R4 | Organizational Development (OD) Event Facilitation | 15 |
| R5 | Organizational Development (OD) Event Design and Development | 15 |
| R6 | Services of Subject Matter Experts (SMEs) | 15 |
| R7 | International Services | 15 |
| R8 | Federal Government Experience | 15 |
| | Total Rated Points: | 120 |
| | Minimum Required Overall Pass Mark (70%): | 84 |

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| Criteria | Rated Criteria | Technical Points | Evaluation Guidelines | *Bidder's Cross References |
|-----------|--|-------------------------|---|----------------------------|
| R1 | <p>The Bidder is requested to provide details of *Completed Events where it has provided Facilitators for Learning Events to **Outside Clients.</p> <p>In order to demonstrate this, the Bidder must provide the following for each event:</p> <ul style="list-style-type: none"> a) Name of Event; b) Event Summary; c) Time Period (mm/yyyy to mm/yyyy); d) Client Name; e) Contact Name; f) Telephone number of Contact; and g) E-mail address of Contact. <p>Canada reserves the right to verify information with the client. These contacts must be reachable for verification/reference purposes.</p> <p>*A Completed Event is defined as a event where the outcome or actual results were achieved and all deliverables have been submitted to the Outside Client.</p> <p>**Outside Client refers to a client that is external to the Bidder's organization. Parent companies, affiliates, and subsidiaries are considered internal.</p> | Up to 15 points. | <p>15 points = 30 or more events 10 points = 26 – 30 events 5 points = 21 -25 events</p> | |

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| Criteria | Rated Criteria | Technical Points | Evaluation Guidelines | *Bidder's Cross References |
|-----------|---|--------------------------------|--|----------------------------|
| R2 | <p>The Bidder is requested to provide details of *Completed Events where it has provided Resources to design and develop Learning Events to **Outside Clients.</p> <p>In order to demonstrate this, the Bidder must provide the following for each event:</p> <ul style="list-style-type: none"> a) Name of Event; b) Event Summary; c) Time Period (mm/yyyy to mm/yyyy); d) Client Name; e) Contact Name; f) Telephone number of Contact; and g) E-mail address of Contact. <p>Canada reserves the right to verify information with the client. These contacts must be reachable for verification/reference purposes.</p> <p>*A Completed Event is defined as a event where the outcome or actual results were achieved and all deliverables have been submitted to the Outside Client.</p> <p>**Outside Client refers to a client that is external to the Bidder's organization. Parent companies, affiliates, and subsidiaries are considered internal.</p> | <p>Up to 15 points.</p> | <p>15 points = 30 or more events 10 points = 26 – 30 events 5 points = 21 - 25 events</p> | |

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| Criteria | Rated Criteria | Technical Points | Evaluation Guidelines | *Bidder's Cross References |
|-----------|---|------------------------|---|----------------------------|
| R3 | <p>The Bidder is requested to provide details of *Completed Events where it has provided Resources for Leadership Coaching, Mentoring and Self-Assessment Services to **Outside Clients.</p> <p>In order to demonstrate this, the Bidder must provide the following for each event:</p> <ul style="list-style-type: none"> a) Name of Event; b) Event Summary; c) Time Period (mm/yyyy to mm/yyyy); d) Client Name; e) Contact Name; f) Telephone number of Contact; and g) E-mail address of Contact. <p>Canada reserves the right to verify information with the client. These contacts must be reachable for verification/reference purposes.</p> <p>* A Completed Event is defined as an event where the outcome or actual results were achieved and all deliverables have been submitted to the outside client.</p> <p>**Outside Client refers to a client that is external to the Bidder's organization. Parent companies, affiliates, and subsidiaries are considered internal.</p> | Up to 15 points | <p>15 points = 30 or more events 10 points = 26 – 30 events 5 points = 21 -25 events</p> | |

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| Criteria | Rated Criteria | Technical Points | Evaluation Guidelines | *Bidder's Cross References |
|-----------|---|------------------------|---|----------------------------|
| R4 | <p>The Bidder is requested to provide details of *Completed Events where it has provided Facilitators for Organizational Development (OD) Event Facilitation to **Outside Clients.</p> <p>In order to demonstrate this, the Bidder must provide the following for each event:</p> <ul style="list-style-type: none"> a) Name of Event; b) Event Summary; c) Time Period (mm/yyyy to mm/yyyy); d) Client Name; e) Contact Name; f) Telephone number of Contact; and g) E-mail address of Contact. <p>Canada reserves the right to verify information with the client. These contacts must be reachable for verification/reference purposes.</p> <p>* A Completed Event is defined as an event where the outcome or actual results were achieved and all deliverables have been submitted to the Outside Client.</p> <p>**Outside Client refers to a client that is external to the Bidder's organization. Parent companies, affiliates, and subsidiaries are considered internal.</p> | Up to 15 points | <p>15 points = 30 or more events 10 points = 26 – 30 events 5 points = 21 -25 events</p> | |

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| Criteria | Rated Criteria | Technical Points | Evaluation Guidelines | *Bidder's Cross References |
|-----------|---|------------------------|---|----------------------------|
| R5 | <p>The Bidder is requested to provide details of *Completed Events it has completed providing Resources for Organizational Development (OD) Event Design & Development to **Outside Clients.</p> <p>In order to demonstrate this, the Bidder must provide the following for each event:</p> <ul style="list-style-type: none"> a) Name of Event; b) Event Summary; c) Time Period (mm/yyyy to mm/yyyy); d) Client Name; e) Contact Name; f) Telephone number of Contact; and g) E-mail address of Contact. <p>Canada reserves the right to verify information with the client. These contacts must be reachable for verification/reference purposes.</p> <p>* A Completed Event is defined as an event where the outcome or actual results were achieved and all deliverables have been submitted to the Outside Client.</p> <p>**Outside Client refers to a client that is external to the Bidder's organization. Parent companies, affiliates, and subsidiaries are considered internal.</p> | Up to 15 points | <p>15 points = 21 or more events 10 points = 16 – 20 events 5 points = 11 -15 events</p> | |

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| Criteria | Rated Criteria | Technical Points | Evaluation Guidelines | *Bidder's Cross References |
|-----------|--|------------------------|---|----------------------------|
| R6 | <p>The Bidder is requested to provide details of *Completed Events where it has provided the services of Subject Matter Experts (SMEs) to **Outside Clients.</p> <p>In order to demonstrate this, the Bidder must provide the following details for each event:</p> <ul style="list-style-type: none"> a) Name of Event; b) Event Summary; c) Time Period (mm/yyyy to mm/yyyy); d) Client Name; e) Contact Name; f) Telephone number of Contact; and g) E-mail address of Contact. <p>Canada reserves the right to verify information with the client. These contacts must be reachable for verification/reference purposes.</p> <p>*A Completed Event is defined as an event where the outcome or actual results were achieved and all deliverables have been submitted to the Outside Client.</p> <p>**Outside Client refers to a client that is external to the Bidder's organization. Parent companies, affiliates, and subsidiaries are considered internal.</p> | Up to 15 points | <p>15 points = 30 or more events 10 points = 26 – 30 events 5 points = 21 -25 events</p> | |

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| Criteria | Rated Criteria | Technical Points | Evaluation Guidelines | *Bidder's Cross References |
|-----------|---|------------------------|---|----------------------------|
| R7 | <p>The Bidder is requested to provide details of *Completed Events where it has provided Learning Services, in an international context (either in Canada or Abroad) to **Outside Clients, within the last (2) two years prior to the Bid Closing Date.</p> <p>In order to demonstrate this, the Bidder must provide the following for each event:</p> <ul style="list-style-type: none"> a) Name of Event; b) Event Summary; c) Time Period (mm/yyyy to mm/yyyy); d) Client Name; e) Contact Name; f) Telephone number of Contact; and g) E-mail address of Contact. <p>Canada reserves the right to verify information with the client. These contacts must be reachable for verification/reference purposes.</p> <p>* A Completed Event is defined as a event where the outcome or actual results were achieved and all deliverables have been submitted to the Outside Client.</p> <p>**Outside Client refers to a client that is external to the Bidder's organization. Parent companies, affiliates, and subsidiaries are considered internal.</p> | Up to 15 points | <p>15 points = 30 or more events 10 points = 26 – 30 events 5 points = 21 -25 events</p> | |

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| Criteria | Rated Criteria | Technical Points | Evaluation Guidelines | *Bidder's Cross References |
|-----------|--|------------------------|--|----------------------------|
| R8 | <p>The Bidder should demonstrate experience in engaging subject matter experts in support of federal government initiatives.</p> <p>In order to demonstrate this, the Bidder must provide the following for each Initiative:</p> <ul style="list-style-type: none"> a) Name of Initiative; b) Initiative Summary; c) Time Period (mm/yyyy to mm/yyyy); d) Client Name; e) Contact Name; f) Telephone number of Contact; and g) E-mail address of Contact. <p>Canada reserves the right to verify information with the client. These contacts must be reachable for verification/reference purposes.</p> | Up to 15 points | <p>15 points = 17 or more initiatives</p> <p>10 points = 11 – 16 initiatives</p> <p>5 points = 5 – 10 initiatives</p> | |

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Bidders must provide the required certifications and additional information to be awarded a contract by using the Attachment 2 to Part 3 Certification and Additional Information.

The certifications provided by bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period. The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

5.1 Certifications and Additional Information Required with the Bid

5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all bidders must provide with their bid, **if applicable**, the Integrity declaration form available on the Forms for the Integrity Regime website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

5.2 Certifications and Information Required Precedent to Contract Award

Bidders must provide the required certifications and additional information to be awarded a contract by using the Attachment 2 to Part 3 - Certifications and Additional Information. 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.

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PART 6 – SECURITY AND INSURANCE

6.1 Security Requirement

This requirement does not contain a security requirement.

6.2 Insurance Requirements

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.

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, Task Authorization Form. An authorized TA is a completed Annex C signed by the TA Authority.
- C.** TA Authority and Limit
- The Project Authority may authorize individual TAs inclusive of any revisions up to a limit of \$40,000.00, 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.
- D.** The authority specified under paragraph C of this clause is granted subject to the sum specified in the Contract under clause 7.6.2 (Canada’s Total Liability, Cumulative Total of all authorized TAs), not being exceeded.
- E.** TA Process
- For each task or revision of a previously authorized task, the Project Authority will provide the Contractor with a request to perform a task prepared using Annex C Task Authorization Form, containing as a minimum:
- the task or revised task description of the Work required, including:
 - Resource Category required;

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- the details of the activities or revised activities to be performed;
 - a description of the deliverables or revised deliverables to be submitted, if any; and
 - a schedule or revised schedule indicating event dates or submission dates for the deliverables, or both, as applicable;
 - the Contract basis (bases) of payment applicable to the task or revised task; and
 - the Contract method(s) of payment applicable to the task or revised task.
- F.** a) Within 5 calendar days of its receipt of the request, the Contractor must provide the Project Authority with a signed and dated response prepared and submitted using the TA form received from the Project Authority, containing as a minimum:
1. the total estimated cost proposed for performing the task or, as applicable, revised task;
 2. a breakdown of that cost in accordance with Annex B, Basis of Payment; and
 3. for each resource proposed by the Contractor for the performance of the Work required:
 - the name of the proposed resource; and
 - the resume of the proposed resource, including any certifications, demonstrating how they meet the minimum qualifications required under article 1.3.3 of Annex A SOW.
- b) **Quick Turnaround:** When CFSD has a requirement for a Quick Turnaround, 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 within 24 hours of its receipt of the request.
- The Contractor agrees it will make every effort to provide a qualified resource within the reduced timeframe described in the TA. CFSD must be able to engage the proposed resource within 48 hours of it's request to the Contractor.
- G.** TA Authorization
1. The TA Authority will authorize the TA based on:
 - the request submitted to the Contractor pursuant to paragraph E of this clause;
 - the Contractor's response received, submitted pursuant to paragraph F 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 requirements specified under paragraph F.3 of this clause.
 3. The authorized TA will be issued to the Contractor by email (as an email attachment in PDF format).
- I.** Minimum Work Guarantee - All the Work - Authorized TAs
1. "Maximum Contract Value" means the sum specified in Contract clause 7.6.2 (Canada's Total Liability, Cumulative Total of all authorized TAs) ; and "Minimum Contract Value" means a fixed amount of \$10,000.00.
 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 Minimum Contract Value and the cost of the Work requested in authorized TAs, performed by the Contractor and accepted by Canada.
4. Canada will have no obligation to the Contractor under this clause if Canada terminates the Contract in whole or in part for default.

J. Periodic Usage Reports - Contracts with TAs

1. The Contractor must compile and maintain detailed and current data on its performance of Work required and requested under TAs (inclusive of any revisions) authorized and issued under the Contract.
2. No later than 15 calendar days after the end of each of the reporting periods below, the Contractor must submit to the Contracting Authority and Project Authority a periodic usage report containing, in an electronic spreadsheet (such as MSOffice Excel), the data elements specified in paragraphs J.3 and J.4 of this clause in the order they are presented. Where at the end of a reporting period, no changes are required to be made to the data contained in the periodic usage report submitted for the previous period, the Contractor must submit a "NIL" report to the Contracting Authority and Project Authority.

The reporting periods are defined as follows:

1st quarter: April 1 to June 30;
2nd quarter: July 1 to September 30;
3rd quarter: October 1 to December 31; and
4th quarter: January 1 to March 31.

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

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- 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).
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.

K. Administration of the TA Process - DFATD

The administration of the TA process will be carried out by DFATD. This process includes:

- monitoring, controlling and reporting on expenditures of the Contract to the Contracting Authority.

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 (2008-06-21), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

7.2.2 Supplemental General Conditions

4007 (2010-08-16), Canada to Own Intellectual Property Rights in Foreground Information
4008 (2008-12-12), Personal Information

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 is no security requirement applicable to the Contract.

7.4 Term of Contract

7.4.1 Period of the Contract

The period of the Contract is from date of Contract for a period of 12 months, inclusive.

7.4.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to four (4) additional one (1) 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:

Mark Hall
Supply Specialist
Training and Specialized Services Division
Public Services and Procurement Canada
Government of Canada

Tel: 613-858-8626
Email: mark.hall@tpsgc-pwgsc.gc.ca

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

7.5.2 Project Authority

The Project Authority for the Contract will be provided at 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 will be inserted at Contract Award.

7.6 Payment

7.6.1 Basis of Payment

7.6.1.1 Authorized TA

Firm Unit Price TA

In consideration of the Contractor satisfactorily completing all of its obligations under the Authorized Task Authorization (TA), the Contractor will be paid the firm unit rates in accordance with the basis of payment, in Annex B and as specified in the Authorized TA. Customs duties are included and Applicable Taxes are extra.

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

7.6.2 Canada's Total Liability

7.6.2.1 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 and travel 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 that it has received or will receive,
- 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.

7.6.2.2 Limitation of Expenditures for Authorized Travel and Living

Concerning the requirements to travel described in 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 a radius of 100kms of the National Capital Region (NCR) defined in the *National Capital Act (R.S.C., 1985, c. N-4)*, available on the Justice Website (<http://laws-lois.justice.gc.ca/eng/acts/N-4/page-9.html#docCont>), at cost, without any allowance for profit and administrative overhead, in accordance with the meal and private vehicle expenses provided in

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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 \$ _____ (To be inserted at contract award). Customs duty are included, and Applicable Taxes are extra.

7.6.3 Method of Payment

The following methods of payment will form part of the authorized TA:

H1008C (2008-5-12), Monthly Payment

7.6.4 Electronic Payment of Invoices - Contract

The Contractor accepts to be paid using any of the following Electronic Payment Instruments: (*the option the Bidder chooses in its bid will be represented here*)

- 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).

7.6.5 Discretionary Audit

C0705C (2010-01-11), Discretionary Audit

7.7 Invoicing Instructions

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

Each invoice must be supported by:

- a. a copy of time sheets to support the time claimed;
- b. a copy of the release document and any other documents as specified in the Contract;
- c. a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses; and/or
- d. a copy of the monthly progress report.

7.7.2 Invoices must be distributed as follows:

- a. One electronic copy must be forwarded by email to the Project Authority; and
- b. One electronic copy must be forwarded to the Contracting Authority, identified under the section entitled "Authorities" of the Contract.

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.

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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.

7.9 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario, Canada. (the name of the province or territory as specified by the Bidder in its bid will be inserted here, if applicable.)

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:
 - C0705C (2010-01-11), Discretionary Audit
 - 4007 (2010-08-16), Canada to Own Intellectual Property Rights in Foreground Information
 - 4008 (2008-12-12), Personal 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 A2000C (2006-06-16), Foreign Nationals (Canadian Contractor)
SACC Manual clause A2001C (2006-06-16), Foreign Nationals (Foreign Contractor)

7.12 Insurance

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

ANNEX A, STATEMENT OF WORK

1. SCOPE

1.1 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) as well as in Global 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. CFSD delivers on average up to 90 courses and 20 complex training programs as well as 40 organizational development workshops averaging between 70 – 120 events annually.

1.2 OBJECTIVE

CFSD has a requirement to engage a qualified Contractor to provide Facilitators on an as-and-required basis. This often requires a Quick Turnaround in order to respond to the ever changing learning needs of the departmental personnel. These areas of work include the following:

- A) Learning Event Facilitation;
- B) Learning Event Design and Development;
- C) Leadership Coaching, Mentoring, and Self-Assessment Services;
- D) Organizational Development (OD) Event Facilitation;
- E) Organizational Development (OD) Event Design and Development; and
- F) Subject Matter Experts (SME's).

1.3 SCOPE OF WORK

When CFSD has a requirement it will issue an Approved Task Authorization to the Contractor which will detail project-specific statements of work, deliverables required, dates, Facilitator category, the expected level of effort, and the language of work required for the activities outlined in the Task Authorization.

1.3.1 TASKS

A) Learning Event Facilitation

As and when requested, the Contractor must provide a Facilitator for Learning Event Facilitation that meets the minimum qualifications detailed in section 1.3.3.

Tasks include, but are not limited to, the following:

- i) facilitate a Learning Event;
- ii) liaising with CFSD personnel;
- iii) reviewing Learning Needs Assessments;
- iv) reviewing the Learning Event objectives and content prior to delivery;
- v) liaising with Subject Matter Experts (SMEs), as required;
- vi) must use CFSD/DFATD templates; letterheads; logos; for all materials related to the event;
- vii) providing CFSD with Post-Event reports; and
- viii) co-facilitation, when required.

B) Learning Event Design and Development

As and when requested, the Contractor must provide a Resource for Learning Event Design and Development that meets the minimum qualifications detailed in section 1.3.3.

Tasks include, but are not limited to, the following:

- i) conducting Needs Analyses as required;
- ii) liaising with CFSD personnel;
- iii) designing or co- designing Learning Events based on the Needs Analysis;
- iv) developing learning materials for Learning Events and event participants as required;
- v) updating and/or adapting existing learning design materials; and
- vi) adhering to CFSD's instructional design methodology, quality standards, service evaluation and quality control requirements as provided by CFSD.

C) Leadership Coaching, Mentoring, and Self-Assessment Services

The Contractor must provide a Facilitator for Leadership Coaching, Mentoring, and Self-Assessment Services that meets the minimum qualifications detailed in section 1.3.3.

Tasks include, but are not limited to, the following:

- i) liaising with CFSD personnel, as required;
- ii) reviewing participant(s) needs assessment;
- iii) administering self-assessment instruments (such as EQ-I, MBTI, DISC, Change Management Self-Assessment, Communication Styles, etc.) individually or in a group setting as required;
- iv) review the results of the self assessments;
- v) delivering a feedback session to the participant(s); and
- vi) delivering Coaching and or Mentoring sessions to identified employees as part of their leadership development.

D) Organizational Development (OD) Event Facilitation

As and when requested, the Contractor must provide a Facilitator for Organizational Development (OD) Event Facilitation that meets the minimum qualifications detailed in section 1.3.3.

Tasks may include, but are not limited to, the following:

- i) liaising with CFSD personnel;
- ii) contributing to and reviewing Needs Analysis of the Participants (e.g. surveys, individual interviews, focus groups, etc.);
- iii) contributing to the design based on the needs analysis;
- iv) facilitating or co-facilitating Organizational Development events; and
- v) 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.

E) Organizational Development (OD) Event Design and Development

As and when requested, the Contractor must provide a Resource for Organizational Development Event Design and Development that meets the minimum qualifications detailed in section 1.3.3.

Tasks may include, but are not limited to, the following:

- i) liaising with CFSD personnel;

-
- ii) contributing to and reviewing Needs Analysis of the Participants (e.g. surveys, individual interviews, focus groups, etc.);
 - iii) design or co-design based on the needs analysis; and
 - iv) 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.

F) Subject Matter Expert (SME)

As and when requested, the Contractor must provide a Subject Matter Expert that meets the minimum qualifications detailed in section 1.3.3.

Tasks may include but are not limited to, the following:

- i) conducting Needs Analyses as required;
- ii) liaising with CFSD personnel;
- iii) developing learning materials for event participants as required;
- iv) adhering to CFSD's instructional design methodology, quality standards, service evaluation and quality control requirements as provided by CFSD; and
- v) delivering a presentation in an area of International Affairs, as required.

1.3.2 DELIVERABLES

The Contractor must, as and when requested by the Project Authority, provide the following Deliverables:

- A) Needs Analysis and feedback as required; (written or oral as specified by the Project Authority);
- B) Learning Event design;
- C) Learning Event materials for participants, such as Power Point presentations, learning tools, guides and case studies;
- D) Learning Event facilitation; and
- E) Post-Event Reports/debriefing; (written or verbal as specified by the Project Authority).

1.3.3 PERSONNEL CATEGORIES AND MINIMUM QUALIFICATIONS

In accordance with the section titled "Task Authorization", in the Contract, the Contractor must provide copies of the CV for each proposed resource with each Task Authorization requested by CFSD. The CV must show at a minimum how the resource meets or exceeds the following minimum qualifications:

A) Learning Event Facilitation

The Facilitator for Learning Event Facilitation must have:

- i) a graduate degree from a recognized Canadian university or the equivalent as established by a recognized Canadian academic credentials assessment service; and
- ii) experience facilitating Learning Events in International Affairs and/or Global Leadership within the past 5 years.

B) Learning Event Design and Development

The Resource for Learning Event Design and Development must have:

- i) a graduate degree from a recognized Canadian university or the equivalent as established by a recognized Canadian academic credentials assessment service; and

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- ii) a minimum of 3 years of experience designing and developing Learning Events in International Affairs and/or Global Leadership within the past 5 years.

C) Leadership Coaching, Mentoring, and Self-Assessment Services

The Facilitator for Leadership Coaching, Mentoring and Self-Assessment Services must have:

- i) a graduate degree from a recognized Canadian university or the equivalent as established by a recognized Canadian academic credentials assessment service; and
- ii)

D) Organizational Development (OD) Event Facilitation

The Facilitator for Organizational Development (OD) Event Facilitation must have:

- i) a graduate degree from a recognized Canadian university or the equivalent as established by a recognized Canadian academic credentials assessment service in Organizational Development or related discipline; and
- ii) experience delivering a minimum of 10 Organizational Development events in the past 5 years. Delivered to employees involved in international work in the public service.

E) Organizational Development (OD) Event Design and Development

The Facilitator for Organizational Development (OD) Event Design and Development must have:

- i) a graduate degree from a recognized Canadian university or the equivalent as established by a recognized Canadian academic credentials assessment service in Organizational Development or related discipline; and
- ii) experience designing and developing a minimum of 10 Organizational Development events to public service employees involved in international work.

F) Subject Matter Experts (SME) in International Affairs

Resources requested as Subject Matter Experts must at a minimum have:

- i) a graduate degree from a recognized Canadian university or the equivalent as established by a recognized Canadian academic credentials assessment service; and
- ii) experience of a minimum of 5 presentations on international affairs in an international meeting/forum within the past five years.

2. CONTRACTOR'S RESPONSIBILITIES

In addition to the Tasks and Deliverables above, the Contractor must:

- 2.1 Declare any matter that could compromise or appear to compromise the objectivity of either the resource or CFSD before embarking on an event delivery, at any point during the period of the Task Authorization.
- 2.2 Confer with the CFSD Project Authority on issues related to confidentiality, privacy and communications.
- 2.3 Ensure that meetings are held with the CFSD Project Authority or his/her delegated representative on an as-needed 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.
- 2.4 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.

3. DFATD SUPPORT TO THE CONTRACTOR

CFSD will ensure that appropriate subject matter experts from DFATD and Learning Specialists within CFSD are available to the Contractor as required to provide input, answer questions, evaluate deliverables and participate in meetings, to enable the resources to proceed on schedule with the completion of the Work requested.

4. REPORTING AND COMMUNICATION STANDARDS

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.

5. 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 Authorization. The following methods will be used to measure the Contractor's qualifications and/or performance:

- 5.1 according to the minimum resource qualifications set out in the article titled, "Personnel Categories and Minimum Qualifications";
- 5.2 by reviewing performance against Task Authorization (TA) project plans and standards;
- 5.3 by performance feedback from CFSD clients, CFSD Learning Specialists and Event Participants regarding their satisfaction with the service; and
- 5.4 by following up on TA Work to see if there were any problems which should have been revealed by the Contractor.

6. LOCATION AND TIME OF WORK

6.1 Location of Work

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.

6.2 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 facilitation services will be required Monday to Sunday, between the hours of 8:00 am and 5:00 pm (Local Time).

7. GLOSSARY OF ACRONYMS AND DEFINITIONS

| Acronyms: | |
|----------------------------------|---|
| 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 |
| GAC: | Global Affairs Canada (Refer to website below for information on the department) |
| NCR: | National Capital Region |
| NGO | Non-Governmental Organization |
| QA: | Quality Assurance |
| SoW: | Statement of Work |
| Definitions: | |
| 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. To identify a facilitator with a signed contract within a week. A contract that may only last from a few weeks to six months. OD (Organizational Development) = DFATD participants and facilitators to address Organizational Development – specific issues and dialogues |
| 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. |
| Organizational Development (OD): | Organizational Development is a system wide application of behavioural science knowledge to the planned development and re-enforcement of organizational strategies, structures and processes for improving an organization's effectiveness (Cummings and Worley, 1993) |
| Coaching Services: | A coaching relationship supports the individual in their professional growth based on self-initiated change in pursuit of specific actionable outcomes. It is a future-focused process with the primary aim to achieve specific goals where the emphasis is on action, accountability and follow through. The premise in |

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| | coching is that the individual is capable of generating their own solutions, with the coach supplying supportive, discovery-based approaches and frameworks. Though objectives are clarified in the coaching process, theya re set by the individual being coached. |
| Mentoring Services: | A mentor is an expert in a certain area who provides their guidance, advice and expertise based on their own experience to someone with less experience. Based on the mentor's experience, insights, knowledge and skills, he/she offers solutions and guides the person seeking mentorship on how to navigate their current situation or role. It can include resolving issues together with the goal of improving the person's skills and level of expertise. |
| Self-Assessment Services: | Assessment services include a variety of tests for management development purposes. |
| Organizational Development (OD) Event: | OD Event refers to an event which features employees and OD facilitators in the same facility at the same time focussed on enhancing organizational performance. |
| Facilitator: | An individual who performs the act of Facilitation. |
| Facilitation: | Facilitation is the act of engaging participants in creating, discovering and applying learning insights. In contrast to presentation, which is typically characterized by a "sage on the stage" delivering content to an audience, facilitation usually involve a "guide on the side" who asks questions, moderates discussions, introduces activities and helps participants learn. This necessary and evolving skill is particularly important for talent development professionals who conduct in-person or virtual training, but other professions can also use it to facilitate team projects, task forces, committees and meetings of any type. |
| Quick turnaround | With the nature of the work to deliver on its mandate, CFSD often has to put together an Event with very little notice which requires a Quick Turnaround on the part of the Contractor and its resource. When CFSD has a requirement for a Quick Turnaround they will request, in an authorized Task Authorization, that the Contractor will make every effort to provide a qualified resource within the reduced timeframe described in the TA. The Contractor will also ensure the proposed resource is ready and able to provide the attention to meet the timeframe requested. Timeframe would be 48 hours to engage required resource. |
| Subject Matter Expert (SME) | Expert in a field who is a non-trainer. |

8. REFERENCES – WEBSITES AND LINKS

Canadian Foreign Service Institute:

<http://www.international.gc.ca/ifaif-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

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Global Affairs Canada Home Page:

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

Global Affairs Canada Language Scales:

http://www.international.gc.ca/ifait-iaeci/test_levels-niveaux.aspx?lang=eng&view=d

Definitions of the National Zone, Regions and Metropolitan Areas

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

ANNEX B , BASIS OF PAYMENT

During the period of the Contract, for Work performed on an as-and-requested basis, in accordance with the Contract, the Contractor will be paid as specified below.

1.0 Professional Fees

The Contractor will be paid the Firm All-Inclusive Per Diem Rates as follows:

| RESOURCE CATEGORY | Firm All-Inclusive Per Diem Rates | | | | |
|--|-----------------------------------|-----------------|-----------------|-----------------|-----------------|
| | INITIAL CONTRACT PERIOD | OPTION PERIOD 1 | OPTION PERIOD 2 | OPTION PERIOD 3 | OPTION PERIOD 4 |
| Learning Event Facilitation | \$ | \$ | \$ | \$ | \$ |
| Learning Event Design and Development | \$ | \$ | \$ | \$ | \$ |
| Leadership Coaching, Mentoring, and Self-Assessment Services | \$ | \$ | \$ | \$ | \$ |
| Organizational Development (OD) Event Facilitation | \$ | \$ | \$ | \$ | \$ |
| Organizational Development (OD) Event Design and Development | \$ | \$ | \$ | \$ | \$ |
| Subject Matter Experts (SMEs) | \$ | \$ | \$ | \$ | \$ |

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.

2.0 Cost Reimbursable Expenses

2.1 Authorized travel and living expenses for Work

Concerning the requirements to travel described in section 6 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 the National Capital Region (NCR) defined in the National Capital Act (R.S.C., 1985, c. N-4), available on the Justice Website (<http://laws-lois.justice.gc.ca/eng/acts/N-4/page-9.html#docCont>)" or outside a radius of 100 kilometers of the Contractor's place of business, 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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ANNEX C, TASK AUTHORIZATION FORM

| | |
|--|----------|
| Contract Number | |
| Task Authorization (TA) Number | |
| Contractor's Name and Address | |
| | |
| Total Estimated Cost of Task (Applicable Taxes extra) before any revisions: | \$ _____ |
| SECTION A – Task Description of the Work Required | |
| | |
| SECTION B – Applicable Basis of Payment | |
| | |
| SECTION C - Cost Breakdown of Task | |
| | |
| SECTION D- Applicable Method of Payment | |
| | |
| Authorization - Authorization | |
| <p>By signing this TA, the Project Authority or the PWGSC Contracting Authority or both, as applicable, certify (ies) that the content of this TA is in accordance with the Contract.</p> <p>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.</p> <p>Name of Project Authority - Nom du chargé de projet _____</p> <p>Signature _____ Date _____</p> <p>Name of PWGSC Contracting Authority - Nom de l'autorité contractante de TPSGC _____</p> <p>Signature _____ Date _____</p> | |
| Contractor's Signature - Signature de l'entrepreneur | |
| <p>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</p> <p>_____</p> <p>Signature _____ Date _____</p> | |