



Bibliothèque et Archives
Canada

Library and Archives
Canada



<p>RETURN BIDS TO: Library and Archives Canada Contracting and Material Management Division 550, de la Cité Blvd. Gatineau, Quebec K1A 0N4 Canada Email : receptiondesoumission-bidreceiving@bac-lac.gc.ca</p> <p>RETOURNER LES SOUMISSIONS À : Bibliothèque et Archives Canada Division des contrats, gestion du matériel 550, de la Cité Blvd. Gatineau, Quebec K1A 0N4 Canada Email: receptiondesoumission-bidreceiving@bac-lac.gc.ca</p> <p>REQUEST FOR PROPOSAL DEMANDE DE PROPOSITION</p> <p>Proposal To: Library and Archives Canada We hereby offer to sell to Her Majesty the Queen in right of Canada, in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the goods, services, and construction listed herein and on any attached sheets at the price(s) set out thereof. On behalf of the bidder, by signing below, I confirm that I have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and I certify that:</p> <ol style="list-style-type: none"> The bidder considers itself and its products able to meet all the mandatory requirements described in the bid solicitation; This bid is valid for the period requested in the bid solicitation; All the information provided in the bid is complete, true and accurate; and If the bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation. <p>Proposition au : Bibliothèque et Archives 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-annexées, au(x) prix indiqué(s). En apposant ma signature ci-après, j'atteste, au nom du soumissionnaire, que j'ai lu la demande de propositions (DP) en entier, y compris les documents incorporés par renvoi dans la DP et que :</p> <ol style="list-style-type: none"> le soumissionnaire considère qu'il a les compétences et que ses produits sont en mesure de satisfaire les exigences obligatoires décrites dans la demande de soumissions; cette soumission est valide pour la période exigée dans la demande de soumissions ; tous les renseignements figurant dans la soumission sont complètes, véridiques et exacts; et si un contrat est attribué au soumissionnaire, ce dernier se conformera à toutes les modalités énoncées dans les clauses concernant le contrat subséquent et comprises dans la demande de soumissions. 	<p>Title – Sujet PRE-RETIREMENT WORKSHOPS</p>						
	<table border="1"> <tr> <td>Solicitation No. – N° de l'invitation 5Z011-24-0140</td> <td>Date October 18, 2023</td> </tr> </table>	Solicitation No. – N° de l'invitation 5Z011-24-0140	Date October 18, 2023				
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	<p>F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/></p>						
<p>Address inquiries to – Adresser toute demande de renseignements à : Anne-Marie Aubry</p>							
<table border="1"> <tr> <td>Area code and Telephone No. Code regional et N° de téléphone</td> <td>e-mail / courriel</td> </tr> <tr> <td>613-716-2173</td> <td>receptiondesoumission-bidreceiving@bac-lac.gc.ca</td> </tr> </table>	Area code and Telephone No. Code regional et N° de téléphone	e-mail / courriel	613-716-2173	receptiondesoumission-bidreceiving@bac-lac.gc.ca			
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See Herein – Voir aux présentes							
<p>Jurisdiction of Contract: Province in Canada the bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in solicitation) Compétence du contrat : Province du Canada choisie par le soumissionnaire et qui aura les compétences sur tout contrat subséquent (si différente de celle précisée dans la demande)</p>							
<p>Vendor/firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur</p>							
<table border="1"> <tr> <td>Telephone No. - N° de téléphone</td> <td></td> </tr> <tr> <td>e-mail - courriel</td> <td></td> </tr> </table> <p>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)</p>	Telephone No. - N° de téléphone		e-mail - courriel				
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Contents

PART 1 – GENERAL INFORMATION 4

1.1 INTRODUCTION..... 4

1.2 SUMMARY..... 4

1.3 DEBRIEFINGS..... 4

PART 2 – BIDDER INSTRUCTIONS 5

2.1 STANDARD INSTRUCTIONS, CLAUSES AND CONDITIONS 5

2.2 SUBMISSION OF BIDS 5

2.3 FORMER PUBLIC SERVANT 5

DEFINITIONS..... 5

FORMER PUBLIC SERVANT IN RECEIPT OF A PENSION..... 6

WORK FORCE ADJUSTMENT DIRECTIVE 6

2.4 ENQUIRIES – BID SOLICITATION 7

2.5 APPLICABLE LAWS 7

2.6 IMPROVEMENT OF REQUIREMENT DURING SOLICITATION PERIOD 7

2.7 BID CHALLENGE AND RECOURSE MECHANISMS 7

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

3.1 BID PREPARATION INSTRUCTIONS..... 8

PART 4 – EVALUATION PROCEDURES AND BASIS OF SELECTION 0

4.1 EVALUATION PROCEDURES 0

4.2 BASIS OF SELECTION 0

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION 2

5.1 CERTIFICATIONS REQUIRED WITH THE BID..... 2

5.2 CERTIFICATIONS PRECEDENT TO CONTRACT AWARD AND ADDITIONAL INFORMATION 2

PART 6 – SECURITY, FINANCIAL AND OTHER REQUIREMENTS 4

6.1 SECURITY REQUIREMENTS 4

PART 7 – RESULTING CONTRACT CLAUSES 5

7.1 STATEMENT OF WORK..... 5

7.2 STANDARD CLAUSES AND CONDITIONS 5

7.3 SECURITY REQUIREMENTS 5

7.4 TERM OF CONTRACT 5

7.5 AUTHORITIES 6

7.6 PROACTIVE DISCLOSURE OF CONTRACTS WITH FORMER PUBLIC SERVANTS..... 7

7.7 PAYMENT 7

7.8 INVOICING INSTRUCTIONS 8

7.9 CERTIFICATIONS AND ADDITIONAL INFORMATION 8

7.10 APPLICABLE LAWS 8

7.11 PRIORITY OF DOCUMENTS 9

7.12 INSURANCE..... 9

7.13 DISPUTE RESOLUTION..... 9

7.14 CONTRACT ADMINISTRATION 9

ANNEX “A” 10



STATEMENT OF WORK	10
ANNEX "B".....	16
BASIS OF PAYMENT	16
ANNEX "C" ELECTRONIC PAYMENT INSTRUMENTS	17



PART 1 – GENERAL INFORMATION

1.1 Introduction

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

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

The Annexes include the Statement of Work, the Basis of Payment and the Electronic Payment Instruments.

1.2 Summary

1.2.1 Library and Archives Canada (LAC) has a requirement for Commercial off the shelf (COTS) two-day workshop on Pre-Retirement Training, which includes the Public Service Pension Plan, for federal public servants and their spouses. The workshops will be delivered virtually in both Canadian official languages, English sessions and French sessions.

The work will be on an as-and-when needed basis.

The contract will be for a period of one (1) year with the option for LAC to extend for a maximum of three (3) additional one (1) year periods of service under the same terms and conditions.

1.2.2 There are no security requirement associated with this requirement.

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](#) (2023-06-08) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

2.2 Submission of Bids

Bids must be submitted by email to: receptiondesoumission-bidreceiving@bac-lac.gc.ca by the date and time indicated on page 1 of the bid solicitation.

Due to the nature of the bid solicitation, bids transmitted by facsimile to Library and Archives Canada will not be accepted.

2.3 Former Public Servant

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

Definitions

For the purposes of this clause, "former public servant" is any former member of a department as defined in the [Financial Administration Act](#), R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

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

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the



implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

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

Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension? **Yes** () **No** ()

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

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

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with [Contracting Policy Notice: 2019-01](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

Work Force Adjustment Directive

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **Yes** () **No** ()

If so, the Bidder must provide the following information:

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



2.4 Enquiries – Bid Solicitation

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

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

2.5 Applicable Laws

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

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

2.6 Improvement of Requirement During Solicitation Period

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reason for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority at least five (5) working days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

2.7 Bid Challenge and Recourse Mechanisms

(a) Several mechanisms are available to potential suppliers to challenge aspects of the procurement process up to and including contract award.

(b) Canada encourages suppliers to first bring their concerns to the attention of the Contracting Authority. Canada's [Buy and Sell](#) website, under the heading "[Bid Challenge and Recourse Mechanisms](#)" contains information on potential complaint bodies such as:

Office of the Procurement Ombudsman (OPO)
Canadian International Trade Tribunal (CITT)

(c) Suppliers should note that there are **strict deadlines** for filing complaints, and the time periods vary depending on the complaint body in question. Suppliers should therefore act quickly when they want to challenge any aspect of the procurement process.



PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

Bidders must submit their bids by email only to the Contracting Authority: receptiondesoumission-bidreceiving@bac-lac.gc.ca

The maximum size of an email: **10 MB.**

The maximum size of an individual file in an email: **4MB.**

The bid must be gathered per section and separated as follows:

Copies of Bid: Canada requests that bidders provide their bid in separately bound sections as follows :

Section I: Technical Bid (one (1) electronic copy by email)

Section II: Financial Bid (one (1) electronic copy by email)

Section III: Certifications not included in the Technical Bid (one (1) electronic copy by email)

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

Due to the nature of the bid solicitation, bids transmitted by epost Connect service and by facsimile will not be accepted.

For bid transmitted by electronic mail, Canada will not be responsible for late bids received at destination after the closing date and time, even if it was submitted before.

Section I: Technical Bid

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

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

Section II: Financial Bid

Bidders must submit their financial bid in accordance with the ATTACHMENT 1 to PART 3 - PRICING SCHEDULE.

3.1.1 Electronic Payment of Invoices – Bid

If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Annex “C” Electronic Payment Instruments, to identify which ones are accepted. Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

3.1.2 Exchange Rate Fluctuation

[C3011T](#) (2013-11-06), Exchange Rate Fluctuation



3.1.3 SACC *Manual* Clauses

Section III: Certifications

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



ATTACHMENT 1 to PART 3 – PRICING SCHEDULE

The Bidder should complete this pricing schedule and include it in its financial bid once completed.

Training Delivery	Fixed Price per workshop for initial period (A)	Fixed Price per workshop for option 1 (B)	Fixed Price per workshop for option 2 (C)	Fixed Price per workshop for option 3 (D)	Number of session (E)	Total evaluated price (A + B + C + D) X E
Two (2) day off the shelf Pre-Retirement workshop * , delivered virtually	\$	\$	\$		1**	\$

*Price must include training material for each participant.

**The estimated number of session indicated herein do not reflect a commitment to LAC and are provided for the purposes of bid evaluation only.



PART 4 – EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

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

4.1.1 Technical Evaluation

4.1.1.1 Mandatory Technical Criteria

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

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

Mandatory Technical Criteria (MT)			
The bid must meet the mandatory technical criteria specified below. The Bidder must provide the necessary documentation to support compliance with this requirement.			
Bids which fail to meet the mandatory technical criteria will be declared non-responsive. Each mandatory technical criterion should be addressed separately.			
Corporate Experience			
Mandatory Technical Criterion		Bidder's Response	
		Substantiation of Technical Compliance	Reference to Applicable Additional Supporting Documentation within the Bidder's Bid
MT1	The Bidder MUST demonstrate that it has provided a team of resources (subject matter experts and producers) that has prepared and delivered pre-retirement planning virtual workshop, on at least two (2) different occasions in English and two (2) different occasions in French to federal department(s) or agency(ies) within the last two years		



	<p>At least one (1) workshop must have dealt with the Quebec pension context and one (1) workshop with the Ontario pension context.</p> <p>The Bidder MUST demonstrate that each workshop included the following topics:</p> <ul style="list-style-type: none"> - Entitlements in retirement (PSSA and provisions of the Federal Public Service Pension); - Estate Planning; - Psychological and sociological aspects of retirement; - Physical health and well-being; and - Financial Planning <p style="text-align: center;">AND</p> <p>Was delivered in a virtual classroom setting to a minimum of ten (10) participants.</p> <p>Bidders should provide the following details as to how the stated experience was obtained:</p> <ul style="list-style-type: none"> - Name of the client organization; - Contact information - Start and end dates of the seminars; - Languages of workshops; - Provincial context <p>Roles and responsibilities of resources (subject matter experts and producers)</p>		
<p>MT2</p>	<p>The Bidder MUST provide a team of subject matter experts to prepare and to deliver the virtual pre-retirement seminars in English and French, but it is acceptable that the English</p>		



	<p>and French modules be delivered by two (2) different qualified subject matter experts.</p> <p>The Bidder MUST complete and include the table 1 Proposed Resources for each of the subject matter experts in its bid. If for a topic, a different subject matter expert will teach for each language, then a different Proposed Resources card must be provided for each subject matter expert for that field.</p>		
MT3	<p>The Bidder MUST provide an electronic copy of the presentation and participants' material in both English and French.</p> <p>If different versions of the course material are used for the Québec and Ontario versions of the course, the Bidder MUST provide a copy of each version in both languages.</p>		
MT4	<p>The Bidder must provide a description of teaching methodology and tools that will be used.</p>		
MT5	<p>The Bidder must provide a description of the teaching platform that will be used.</p> <p>The description MUST include:</p> <ul style="list-style-type: none">• A written description and screenshots from the participants' point of view of the basic functions :<ul style="list-style-type: none">○ log into the session○ open/close the camera and mic (mute/unmute)○ "Raised hand"○ Chat• A written description and screenshots from the participants' point of view of the advanced functions that will be used (e.g., breakout rooms, survey/questionnaire, etc.).		



	<ul style="list-style-type: none">• A contingency plan should there be any issue with the platform.		
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Tables T1 Proposed Resources

<p>Table T1-1 Certified Pay Specialist</p> <p>Proposed Resource Name: _____</p> <p>Language (French/English/Bilingual): _____</p>
Mandatory Criteria
<p>1. The Bidder must demonstrate that the proposed pay specialist holds a certification given by Superannuation, Pension Transition and Client Services Sector (SPTCSS) of Public Works and Government Services Canada (PWGSC) to deliver retirement Planning Information Workshops on the Public Service Superannuation Act (R.S.C., 1985, c.P-36) and its provisions and regulations.</p>
Bidder Response:
<p>2. The Bidder must demonstrate that the proposed Pay Specialist has delivered at least 2 times the Module on the Federal Public Service Pension Plan over the past 2 years.</p>
Bidder Response:

<p>Table T1-2 Lawyer, Paralegal or Notary</p> <p>Proposed Resource Name: _____</p> <p>Language (French/English/Bilingual): _____</p>
Mandatory Criteria
<p>1. The Bidder must demonstrate that the proposed lawyer or paralegal must have a law degree* (e.g., Bachelor of Laws (LL.B) or Bachelor of Civil Law (B.C.L.) degree) from a recognized Canadian university or a Certificate of Qualification issued by the National Committee on Accreditation (NCA) of the Federation of Law Societies of Canada.</p>
Bidder Response:
<p>2. The Bidder must demonstrate that the proposed Lawyer or paralegal has a minimum of 3 years of experience, providing legal advice on the topic of Wills and Estate Planning within the context of preparing for retirement to groups or individuals.</p>
Bidder Response:
<p>3. The Bidder must demonstrate that the proposed lawyer or paralegal has delivered at least 2 times the Module on Estate Planning over the past 2 years on estate planning, wills and power of attorney.</p>



Table T1-2 Lawyer, Paralegal or Notary
Proposed Resource Name: _____
Language (French/English/Bilingual): _____
Bidder Response:

Table T1-3 Financial Planner
Proposed Resource Name: _____
Language (French/English/Bilingual): _____
Mandatory Criteria
1. The Bidder must demonstrate that the proposed Financial Planner is a certified financial planner (CFP) professional designation.
Bidder Response:
2. The Bidder must demonstrate that the proposed Financial Planner has a minimum of 3 years of experience in providing advice on Income Security Programs and Financial Planning to groups or individuals.
Bidder Response:
3. The Bidder must demonstrate that the proposed Financial Planner has delivered at least 2 times the Module on Financial Planning over the past 2 years on financial planning.
Bidder Response:



Table T1-4 Nurse, nutritionist, dietician, or medical doctor
Proposed Resource Name: _____
Language (French/English/Bilingual): _____
Mandatory Criteria
1. The Bidder must demonstrate that the proposed nurse, nutritionist, dietician, or medical doctor has a minimum of 3 years of experience providing advice on health and healthy aging to groups or individuals.
Bidder Response:
2. The Bidder must demonstrate that the proposed nurse, nutritionist, dietician, or medical doctor has delivered at least 2 times the Module* on Health and Nutrition to the federal public servants over the past 2 years.
Bidder Response:

Table T1-5 Psychologist, psychological associate (few jurisdictions) or psychotherapist
Proposed Resource Name: _____
Language (French/English/Bilingual): _____
Mandatory Criteria
1. The Bidder must demonstrate that the proposed psychologist, psychological associate (few jurisdictions) or psychotherapist holds the professional designation recognized by its professional association to exercise his right of practice in accordance with the jurisdiction in force in a province or territory.
Bidder Response:
2. The Bidder must demonstrate that the proposed psychologist, psychological associate (few jurisdictions) or psychotherapist has a minimum of 3 years of experience in providing psychological counselling services to groups or individuals.
Bidder Response:
3. The Bidder must demonstrate that the proposed psychologist, psychological associate or psychotherapist has delivered at least 2 times the Module on Psychological Aspects of Retirement to the federal public servants over the past 2 years.
Bidder Response:



Point Rated Technical Criteria

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

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

	Requirement	Point Distribution	Score	Comments
RT1	<p>As per MT1 the Bidder MUST demonstrate that it has provided a team of resources (subject matter experts and producers) that has prepared and delivered pre-retirement planning virtual workshops, on at least two (2) different occasions in English and two (2) different occasions in French to federal department(s) or agency(ies).</p> <p>Bidders will received up to a maximum of 6 points for workshops over and above the minimum workshops required under MT1.</p>	<p>3 workshops in English = 1 points 3 workshops in French = 1 points 4 workshops in English = 2 points 4 workshops in French = 2 points 5 workshops in English and more= 3 points 5 workshops in French and more = 3 points</p>		
RT2	<p>As per MT3 the Bidder must provide an electronic copy of the presentation and participants' material in both English and French.</p> <p>As per the section 3.2.1.1 of the Statement of Work, the content must:</p> <ul style="list-style-type: none"> a) Be adapted for the following audience: <ul style="list-style-type: none"> i. Federal Public Service Employees and their spouses; ii. Federal Public Service Executives and their spouses; b) Include at a minimum the following topics: <ul style="list-style-type: none"> i. Entitlements in retirement (PSSA and provisions of the 	<p>0 points - Unacceptable: The Bidder's course material does not cover all the conditions of section 3.2.1.1.</p> <p>5 points - Acceptable: All the conditions of section 3.2.1.1 are met, but in one (1) or more module(s), it is not clear what concrete actions the participants should do or consider doing.</p> <p>10 points - Excellent: All the conditions of section 3.2.1.1 are met, and for each module, it is</p>		



	<p>Federal Public Service Pension);</p> <ul style="list-style-type: none"> ii. Estate Planning; iii. Psychological and sociological aspects of retirement; iv. Physical health and well-being; and v. Financial Planning <p>c) Be adapted to account for the differences in the pension scheme for each province (Québec and Ontario);</p> <p>d) Be adapted to accommodate the different information based on the occupational groups in the public service pension plan; and</p> <p>e) Be adapted to groups between 12 and 36 participants.</p> <p>Bidders will receive up to a maximum of 10 points for the quality of the course material.</p>	<p>clear what concrete actions the participants should do or consider doing.</p>		
<p>RT3</p>	<p>As per MT4 Bidder must provide a description of teaching methodology and tools that will be used.</p> <p>Bidders will receive up to a maximum of 10 points for the quality of the teaching methodology description.</p>	<ul style="list-style-type: none"> • 3 points – Poor: The teaching methodology is poorly described or unclear. • 7 points – Acceptable: The teaching methodology is described in moderate details, but only present the bidder's existing teaching practices • 10 points – Excellent: The description of teaching methodology is clearly described, including a detailed description of the Bidder's existing teaching 		



		practices and any specific measures to be implemented for LAC.		
RT4	<p>As per MT5 Bidder must provide a description of teaching platform that that will be used.</p> <p>The description MUST include:</p> <ul style="list-style-type: none"> • A written description and screenshots from the participants' point of view of the basic functions : <ul style="list-style-type: none"> ○ log into the session ○ open/close the camera and mic (mute/unmute) ○ "Raised hand" ○ Chat • A written description and screenshots from the participants' point of view of the advanced functions that will be used (e.g., breakout rooms, survey/questionnaire, etc.). • A contingency plan should there be any issue with the platform. <p>Bidders will receive up to a maximum of 10 points for the quality of the teaching platform description.</p>	<ul style="list-style-type: none"> • 5 points – Acceptable: All of the requested items are presented with limited details. • 10 points – Excellent: All the requested items are presented and are clearly described. 		
		TOTAL PASS MARK 19 points MAXIMUM POINTS 36 Points	points	



4.2 Basis of Selection

Highest Combined Rating for Technical Merit (70%) and for Price (30%)

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria; and
 - c. obtain the required minimum overall pass mark of **19 points out of 36 points**.
2. Bids not meeting a), b) and c) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained/maximum number of points available multiplied by the ratio of 70%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
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 70/30 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$45,000 (45).

Basis of Selection – Highest Combined Rating Technical Merit (70%) and Price (30%)

Basis of Selection – Highest Combined Rating Technical Merit (70%) and Price (30%)				
		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	$115/135 \times 70 = 59.62$	$89/135 \times 70 = 46.15$	$92/135 \times 70 = 47.70$
	Pricing Score	$45/55 \times 30 = 24.54$	$45/50 \times 30 = 27$	$45/45 \times 30 = 30$



Combined Rating	84.16	73.15	77.70
Overall Rating	1st	3rd	2nd



PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

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

5.1 Certifications Required with the Bid

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

5.1.1 Integrity Provisions – Declaration of Convicted Offences

In accordance with the 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](http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html) website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

5.2 Certifications Precedent to Contract Award and Additional Information

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

5.2.1 Integrity Provisions – Required Documentation

In accordance with the section titled Information to be provided when bidding, contracting or entering into a real property agreement of the [Ineligibility and Suspension Policy](http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

5.2.2 Federal Contractors Program for Employment Equity – Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's](#) website.

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



5.2.3 Additional Certifications Precedent to Contract Award

5.2.3.1 Status and Availability of Resources

SACC Manual clause [A3005T](#) (2010-08-16) Status and Availability of Resources

5.2.3.2 Education and Experience

SACC Manual clause [A3010T](#) (2010-08-16) Education and Experience



PART 6 – SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirements

There is no security associated with the requirement.



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 at Annex A.

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 \(2022-12-01\)](#), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

7.2.2 Supplemental General Conditions

[4006 \(2010-08-16\)](#) Contractor to Own Intellectual Property Rights in Foreground Information is herein incorporated by reference into and form part of this contract.

7.3 Security Requirements

7.3.1 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 Contract award to February 28th, 2025 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 three (3) additional one-year periods under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

Canada may exercise this option at any time by sending a written notice to the Contractor at least two (2) calendar days before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.



7.5 Authorities

7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Anne-Marie Aubry
Procurement Team Leader
Contracting and Materiel Management Division
Library and Archives Canada
550 de la Cité Boulevard
Gatineau, Québec
K1A 0N4

Telephone: 613-716-2173
Email address: anne-marie.aubry@bac-lac.gc.ca

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

7.5.2 Project Authority

The Project Authority for the Contract is: *[To be inserted at contract award]*

Name: _____
Title: _____
Organization: _____
Address: _____

Telephone: ____ - ____ - ____
Facsimile: ____ - ____ - ____
E-mail address: _____

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

7.5.3 Technical Authority

The Technical Authority for the Contract is: *[To be inserted at contract award]*

Name: _____
Title: _____
Organization: _____
Address: _____

Telephone: ____ - ____ - ____
Facsimile: ____ - ____ - ____
E-mail address: _____



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

7.5.4 Contractor's Representative *[To be inserted at contract award]*

7.6 Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a [Public Service Superannuation Act](#) (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with [Contracting Policy Notice: 2019-01](#) of the Treasury Board Secretariat of Canada.

7.7 Payment

7.7.1 Basis of Payment

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work, as determined in accordance with the Basis of Payment in Annex B, to a limitation of expenditure of \$ *[To be inserted at contract award]*. Customs duties are included and Applicable Taxes are extra.

7.7.2 Limitation of Expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed \$ *[To be inserted at contract award]*. Customs duties are included and Applicable Taxes are extra.
2. No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - a. when it is 75% committed, or
 - b. four months before the contract expiry date, or
 - c. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work, whichever comes first.
3. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.



7.7.3 Method of Payment – Monthly Payment

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

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

7.7.4 SACC Manual Clauses

SACC *Manual* clause [A9117C](#) (2007-11-30) T1204 - Direct Request by Customer Department

7.7.5 Electronic Payment of Invoices – Contract

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

- a. Direct Deposit (Domestic and International);

7.8 Invoicing Instructions

7.8.1 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;

7.9 Certifications and Additional Information

7.9.1 Compliance

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

7.10 Applicable Laws

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



7.11 Priority of Documents

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

- (a) the Articles of Agreement;
- (b) the supplemental general conditions [4006](#) (2010-08-16) Contractor to Own Intellectual Property Rights in Foreground Information is herein incorporated by reference into and form part of this contract;
- (c) the general conditions [2035](#) (2022-12-01), General Conditions - Higher Complexity - Services ;
- (d) Annex A, Statement of Work;
- (e) Annex B, Basis of Payment;
- (f) the Contractor's bid dated _____, **[To be inserted at contract award]**

7.12 Insurance

SACC Manual clause [G1005C](#) (2016-01-28) Insurance - No Specific Requirement

7.13 Dispute Resolution

- (a) The parties agree to maintain open and honest communication about the Work throughout and after the performance of the contract.
- (b) The parties agree to consult and co-operate with each other in the furtherance of the contract and promptly notify the other party or parties and attempt to resolve problems or differences that may arise.
- (c) If the parties cannot resolve a dispute through consultation and cooperation, the parties agree to consult a neutral third party offering alternative dispute resolution services to attempt to address the dispute.
- (d) Options of alternative dispute resolution services can be found on Canada's Buy and Sell website under the heading "[Dispute Resolution](#)".

7.14 Contract Administration

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1(1) of the Department of Public Works and Government Services Act will review a complaint filed by the Contractor respecting administration of this contract if the requirements of Subsection 22.2(1) of the Department of Public Works and Government Services Act and Section 15 and 16 of the Procurement Ombudsman Regulations have been met, and the interpretation and application of the terms and conditions and the scope of the work of this contract are not in dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at boa.opo@boa.opo.gc.ca.



ANNEX "A"

STATEMENT OF WORK

1. Scope

1.1. Objective

Library and Archives Canada (LAC) has a requirement for Commercial off the shelf (COTS) two-day workshop on Pre-Retirement Training, which includes the Public Service Pension Plan, for federal public servants and their spouses. The workshop will be provided on demand and will be delivered virtually in English and French.

1.2. Background

Until 2015, the Canada School of Public Service (CSPS) delivered the pre-retirement training to all federal public servants. This training is no longer centrally delivered. Consequently, Library and Archives Canada is solely responsible for helping its employees prepare for their upcoming retirement. LAC employees need a course to learn the main components of a comprehensive retirement plan. There are many aspects to consider when planning for retirement, and many decisions to be made regarding pension entitlements, estate and financial planning, as well as physical and psychological health.

2. Reference Documents

The following reference documents are available to the Vendor:

- a) Collective agreements - <http://www.tbs-sct.gc.ca/agreements-conventions/index-eng.aspx>
- b) Canadian Human Rights Act - <http://laws-lois.justice.gc.ca/eng/acts/h-6/>
- c) Employment Equity Act - <http://laws-lois.justice.gc.ca/eng/acts/E-5.401/index.html>
- d) Public Service Employment Act - <http://lois-laws.justice.gc.ca/eng/acts/p-33.01/>
- e) Public Service Staff Relations Act - <http://laws-lois.justice.gc.ca/eng/acts/p-35/>
- f) Labour Relations - PSMA Related Policy Instruments and Guidelines - https://www.tbs-sct.canada.ca/pubs_pol/hrpubs/tbm_11B/siglist-eng.asp
- g) Public Service Modernization Act - <http://laws-lois.justice.gc.ca/eng/acts/p-33.4/>
- h) Official Languages Act - <http://laws-lois.justice.gc.ca/eng/acts/o-3.01/>
- i) Financial Administration Act - <https://laws-lois.justice.gc.ca/eng/acts/f-11/>
- j) Federal Accountability Act - <http://laws-lois.justice.gc.ca/eng/acts/F-5.5/>
- k) Treasury Board Policies - <http://www.tbs-sct.gc.ca/pol/index-eng.aspx>
- l) Employment Equity Program - <https://intranet.canada.ca/hr-rh/ve/dee-deme/index-eng.asp>
- m) Internal Disclosure - <http://www.tbs-sct.gc.ca/pd-dp/index-eng.asp>
- n) The Treasury Board of Canada's Travel Policy and Associated Directives



- o) Public Service Superannuation Act (PSSA) Certification Program
- p) Pension Benefit Division Act
- q) Treasury Board of Canada Secretariat – Pensions
- r) Pension Benefits Package
- s) The Insurance Administration Manual

3. Requirement

3.1 Scope of Work

The Vendor must provide:

- a) Commercial off the shelf (COTS) workshops on Pre-Retirement Training to groups of Canadian federal public servants and their spouses (defined as "participants ") in English and in French as detailed in section 3.2.1.
- b) Facilitators and producers to organize and deliver the workshops as detailed in section 3.2.2.
- c) The material and documentation and training platform (Teams, Zoom, etc.), as detailed in section 3.2.3.

3.2 Tasks

3.2.1 Workshops on Pre-Retirement Training

3.2.1.1 Content

The workshops on Pre-Retirement Training must:

- f) Be adapted for the following audience:
 - i. Federal Public Service Employees and their spouses;
 - ii. Federal Public Service Executives and their spouses;
- g) Include at a minimum the following topics:
 - i. Entitlements in retirement (PSSA and provisions of the Federal Public Service Pension);
 - ii. Estate Planning;
 - iii. Psychological and sociological aspects of retirement;
 - iv. Physical health and well-being; and
 - v. Financial Planning
- h) Be adapted to account for the differences in the pension scheme for each province (Quebec and Ontario);
- i) Be adapted to accommodate the different information based on the occupational groups in the public service pension plan; and
- j) Be adapted to groups between 12 and 36 participants.

The vendor must keep the content updated for relevancy and accuracy as per legislative changes.



3.2.1.2 Training schedule

The Workshops must be delivered during normal business hours from 8:30 am to 4:30 pm in the Eastern Time Zone.

The Workshops must include one 15-minute break in the morning, one 15-minute break in the afternoon and a one-hour lunch break each day. Including all the breaks, a training day cannot last more than 7.5 hours. The workshops must have two days.

Any changes to the established hours of delivery require prior approval by the Project Authority.

3.2.1.3 Availability and Cancellation of the Workshops

Each year, LAC will determine the number of sessions and a time window when they will be delivered. The time window will be shared with the vendor at least 6 weeks in advance. The sessions' delivery dates will be determined by the supplier and the project authority.

LAC may cancel a session at no cost no later than 10 working days prior to the anticipated date of delivery.

3.2.1.4 Registration to the Workshops

LAC will advertise the upcoming sessions. At the end of the registration period, LAC will provide to the Vendor the list of participants and their email addresses 5 business days prior to the session. The Vendor must send a meeting invitation with the meeting link and course material to the participants and the Technical Authority.

3.2.2 Facilitators and producers

The Vendor must provide the following **qualified professional** facilitators to deliver the workshops. The facilitators must have experience presenting their subject matter.

- a) Certified Pay Specialist;
- b) Lawyer, Paralegal or Notary;
- c) Financial Planner;
- d) Nurse, Nutritionist, dietician, or Medical Doctor; and
- e) Psychologist or Psychological associate (few jurisdictions) or Psychotherapist.

In addition, the Vendor must provide a producer that will support the facilitators to deliver the workshops.

3.2.2.1 Proposed Facilitators and Producers

The facilitators originally proposed in the submission must be available to start work upon the award of the contract, and any subsequent replacements must be mutually acceptable.

The Vendor must be able to provide last-minute backup in circumstances when a facilitator or producer cannot show up and must be able to replace a facilitator when the course evaluation is not acceptable to the project authority. Should the services of any individual prove unsatisfactory to LAC, the vendor will be informed in writing. LAC can request that the vendor take corrective measures, including and not limited to, the replacement of the problematic facilitator or producer.

3.2.2.2 Facilitators and Producers Tasks and Responsibilities



For Facilitators and Producers:

- a. Connect to the virtual meeting at least 30 minutes prior to the start time of the workshop to allow time to greet participants and resolve any logistic or technical issue;
- b. Verify that the link initially sent works for LAC employees;
- c. Ensure the platform is functioning properly;
- d. Dress and behave appropriately for a professional audience;
- e. Inform the Vendor and the Technical Authority of any difficulties related to the workshop;

For Producers:

- a. Take attendance according to the list of participants offered by the Technical Authority and refer anyone not listed on the participant's list to the Technical Authority;
- b. Ensure that the presentation runs smoothly;
- c. Monitor the chat and the raised hands, and inform the facilitators when there is a question or comment from a participant;
- d. Use the platform's functions (survey, breakout rooms, etc.);
- e. Provide technical support to the participants and the facilitators;
- f. Provide the link to the feedback form to the participants at the end of the session.

For Facilitators:

- a) Deliver the approved workshop material only;
- b) Respect adult education principles;
- c) Ensure the workshop timeline is managed effectively;
- d) Keep the discussion on track;
- e) Share subject matter knowledge when required;
- f) Must not market or promote personal or business services;

3.2.3 Material and documentation

The content of the workshop must reflect the retirement environment in both Quebec and Ontario

The Vendor must provide electronic copies in PDF format of the material and documentation to the participants. The documents must be provided to the participants a minimum of two (2) business days prior to the session.

LAC will inform the Vendor if a participant request accommodation measures. The Vendor must propose a solution, including providing accessible documents and/or other measures, to accommodate the employee.

3.2.4 Workshop Evaluation Questionnaire - Vendor's role

- a) Before the first session, the vendor must send a copy of the feedback form to the Technical Authority;
- b) Following LAC approval, the vendor will send a link of the feedback form to participants at the end of each session. The answers must be anonymous;
- c) The results of the evaluation of the course must be sent via email to the Technical Authority within a maximum of 2 weeks following the end of the course.



If the evaluation results of the course content or delivery does not meet the expectations, the Vendor must propose a performance improvement plan, which incorporates measurable and achievable goals that address the deficiencies highlighted in the evaluation questionnaire results.

LAC may, at any time, change the workshop evaluation questionnaire.

4. Support provided by LAC

4.1 Support provided by the Technical Authority:

- a) Coordinate participants' registration;
- b) Prepare participant's list;
- c) Liaise with the Vendor to coordinate logistics;
- d) Provide a copy of the participants list to the Vendor prior to the workshop.
- e) Inform the Vendor of any participant's special needs, if any;
- f) Help resolve any issues or concerns prior to the start of each session;
- g) Inform the Project Authority of any issue related to the facilitators' performance.

5.0 Constraints

5.1 Change in the workshops

The vendor must inform the Project Authority when changes are made to the workshop and the material.

The vendor must ensure that all workshop material is kept up-to-date based on changes in legislation and notify the Project Authority of such changes.

LAC Project Authority or Technical Authority may be present during workshops to observe and assess the workshop.

5.2 Technical Environment

Participants will access the training platform from a secured IT environment that prevents the installation of applications not approved by the IT services. Microsoft Teams (MS Teams) is installed on all LAC's workstations.

Should the Vendor use a platform other than MS Teams, the Vendor must use a platform that does not require the installation of an application and that can be used directly from a web browser (Edge or Chrome).

6.0 Language

All the participants' material must be provided in English and French depending on the language of the session in accordance with the *Official Languages Act*.

The facilitators and producers must be proficient in the language of the session they are facilitating. LAC reserves the right to evaluate the facilitators' language proficiency throughout the period of the contract. Should the evaluation determine that the facilitator does not meet the language requirement, the Vendor must immediately replace the facilitator at no additional cost.



7.0 Deliverables

- a) Workshops delivered virtually in both official Canadian languages;
- b) Material and documentation in both official Canadian languages in PDF format;

8.0 Meetings

The meetings will take place virtually. The Vendor will not be reimbursed for any costs incurred for meetings.

8.1 Kick off Meeting

A Kick-off meeting will be held within thirty (30) working days from the date of the contract issuance. The kick-off meeting will be held virtually on MS Teams. The exact time of the kick-off meeting will be provided after the contract award.

The purpose of the kick-off meeting will be to:

- a. Review the contract requirements;
- b. Review and clarify the respective roles and responsibilities and ensure common understanding of the requirement and the terms and conditions of the contract.

9.0 Location of Training

The sessions will take place virtually.

10.0 Travel

There will be no travel costs, as the sessions will be offered online.



ANNEX "B"

BASIS OF PAYMENT

To be completed at contract award

Please refer to Attachment to Part 3 - Pricing Schedule



ANNEX "C" ELECTRONIC PAYMENT INSTRUMENTS



PROTÉGÉ B lorsque rempli
PROTECTED "B" when completed

**T1204 Information Reporting by Contractor
for the payment of invoices**

**Information T1204 à transmettre par
l'entrepreneur pour le paiement des factures**

1. The Contractor shall provide the following information within 15 calendar days from date of award of the contract; and return this form with the signed contract. This is a condition of payment.

1. L'entrepreneur doit fournir l'information suivante dans les 15 jours suivant la date d'attribution du marché et retourner ce formulaire avec le contrat signé. Il s'agit d'une condition de paiement.

- a. the legal name of the entity or individual, as applicable, i.e. the name associated with the Social Insurance Number (SIN) or Business Number (BN), as well as the address and the postal code;

- a. l'appellation légale de l'entité ou du particulier, selon le cas, i.e. le nom associé au numéro d'assurance sociale (NAS) ou au numéro d'entreprise, ainsi que l'adresse et le code postal;

Name / Nom:

Adresse / Adresse:

Are you a former public servant or a person that was incorporated, receiving a GOC pension or lump sum payment? / Êtes-vous un ancien fonctionnaire ou une personne s'étant constituée en société recevant une pension du GC ou un montant forfaitaire?

Are you an aboriginal supplier? / Êtes-vous un fournisseur autochtone?

Yes / Oui

No / Non

Yes / Oui

No / Non

b. The status of the Contractor:

b. Le statut juridique de l'entrepreneur:

Individual / Particulier

Partnership / Société de personnes

Corporation / Société

c. Dans le cas d'un particulier, le NAS de l'entrepreneur ou le numéro d'entreprise ou le numéro de la taxe sur les produits et services (TPS) ou de la taxe de vente harmonisée (TVH) / For individuals, the Contractor's SIN and, if applicable, the BN, or the Goods and Services Tax (GST)/Harmonized Sales Tax (HST) number;

d. Dans le cas d'une société de personnes et d'une société, le numéro d'entreprise, ou si ce dernier n'est pas disponible, le numéro de TPS/TVH. En l'absence d'un numéro d'entreprise ou de TPS/TVH, une société devra fournir son numéro d'impôt de société du feuillet T2, tandis qu'une société de personnes devra fournir le NAS de l'associé qui a signé le marché / For partnerships and corporations, the BN, or if this is not available, the GST/HST number. If there is no BN or GST/HST number, corporations must provide their T2 Corporation Tax number, while partnerships must provide the SIN of the partner who has signed the contract; and,

Contractor's SIN: / NAS de l'entrepreneur:

GST/HST number: / Numéro TPS/TVH:

Business Number: / Numéro d'entreprise:

T2 Corp. Tax number: / Numéro d'impôt de société T2

e. the following certification signed by the Contractor or an authorized officer:

e. l'attestation suivante, signée par l'entrepreneur ou son représentant autorisé :

"I certify that I have examined the information provided above, including the legal name, address, and Canada Customs and Revenue Agency identifier, (c) or (d) as applicable, and that it is correct and complete, and fully discloses the identification of this Contractor."

« Je certifie par la présente que j'ai examiné tous les renseignements fournis ci-dessus, y compris l'appellation légale, l'adresse et le numéro identificateur de l'Agence des douanes et du Revenu du Canada, c) ou d) selon le cas, qu'ils sont corrects et complets et qu'ils divulguent clairement l'identité du présent entrepreneur. »

Signature

date



Demande d'inscription au dépôt direct pour les fournisseurs canadiens

PROTÉGÉ B lorsque rempli
PROTECTED "B" when completed
Direct Deposit Enrollment Request for Canadian suppliers

Pour les paiements fait au Canada seulement

For payments deposited in Canada only

Demande initiale
New Request

Modification
Change

Annulation
Cancellation

A REMPLIR ÉLECTRONIQUEMENT OU Écrire lisiblement

FILL FORM ELECTRONICALLY OR print clearly

Nom du particulier ou de l'entreprise
Surname or CO Name

Prénom
Given Name

Adresse
Address

Ville
City

Code postal
Postal Code

Province

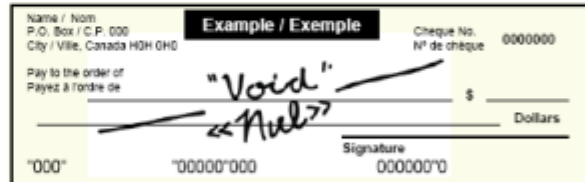
Courriel
E-Mail

Téléphone
Telephone

S.V.P. joindre un spécimen de chèque avec la mention 'NUL' pour votre compte bancaire. Si vous n'avez pas de compte chèque, compléter cette section avec vos informations bancaires.

Please attach a blank cheque for your bank account with 'VOID' written on it. If you don't have a chequing account fill this section with your banking information.

Nom et adresse de l'institution financière
Financial institution's name and address



N° succursale - Branch No

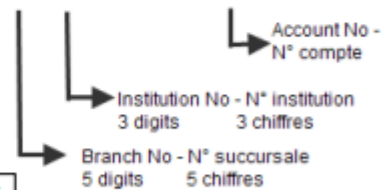
N° institution - Institution No

N° compte - Account No

For finance use only / Pour finances seulement

Code S- _____

By / Par: _____



Attestation

En tant que bénéficiaire des paiements, j'autorise BAC à déposer mes remboursements dans le compte bancaire mentionné ci-dessus et ce, jusqu'à nouvel ordre.

Signature

Certification

I, as the person entitled to receive the payments, authorize LAC to deposit my reimbursements into the above-noted bank account until further notice.

Tel - Tél.

Date



Renseignements supplémentaires

- Ne remplissez pas ce formulaire si vous avez déjà demandé le dépôt direct et que les renseignements n'ont pas changé.
- Si vous changez de compte bancaire détenu au Canada dans lequel nous déposons un paiement, assurez-vous de nous informer des renseignements relatifs à votre nouveau compte bancaire. De plus, assurez-vous que le paiement est déposé dans le nouveau compte bancaire avant de fermer l'ancien.
- Votre demande de dépôt direct restera en vigueur jusqu'à ce que vous modifiez les renseignements originaux ou que vous annuliez le service.
- Pour interrompre le dépôt direct veuillez remplir ce formulaire en omettant les informations bancaires et en cochant la case 'Annulation'.
- Vous recevrez un courriel contenant le numéro de facture et le montant lorsqu'un paiement sera émis.
- Envoyez votre formulaire dûment rempli par télécopieur au 819-934-5264 ou par courriel à bac.supportfinance-financesupport.lac@canada.ca ou par la poste à Bibliothèque et Archives Canada, Finance, 550 boul de la Cité, 8^{ème} étage, Gatineau QC K1A 0N4

More information

- Please do not fill in this form if you already requested the reimbursement via Direct deposit or if the banking information has not changed.
- If you are changing your bank account held in Canada into which we deposit a payment, be sure to tell us about your new bank account. In addition, make sure you do not close the old bank account before we deposit the payment into the new bank account.
- Your direct deposit request will stay in effect until you change the information or cancel the service.
- To cancel direct deposit service, send this form without the banking info and tick the Cancellation Box
- You will receive an e-mail with the invoice number and the amount to notify you when a payment is issued.
- Send your completed form by email at bac.supportfinance-financesupport.lac@canada.ca or by fax at 819-934-5264 or by mail at Library and Archives Canada, Finance, 550 boul de la Cité, 8th Floor, Gatineau QC K1A 0N4.