

Statement of Work Template: Training Delivery

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This template suits contracts to deliver pre-defined training courses. Contracts to customize or develop training courses require a more detailed statement of work.

Statement of Work: Training Delivery

1.0 Title – Must be included. This broad statement describes the requirement and includes the names of the course(s) required. It identifies the target audience.

PuMP Performance Measurement Blueprint Workshop for Western Canada & Territories Region (WT), Benefits Delivery Services Branch (BDSB) leadership and business expertise employees.

2.0 Objectives – Must be included. State the training objectives. What are the high-level learning objectives/purposes? How does this fit ESDC priorities?

The primary objective of **PuMP** training is to help redesign the performance measurement process and make our strategy measurable in a way that will meet actual goals.

This training will:

- Make our strategy measurable and easier to communicate
- Design meaningful performance measures
- Develop ownership and buy-in from employees and stakeholders
- Bring measure to life with a consistent, rigorous approach
- Design actionable reports and dashboards
- Identify signals from our measures about whether performance is improving or not
- Make measurement about transformation

This training will provide relevant information and explanations of how to build the capacity and capabilities within our organization to use performance measurement with engaging new techniques and reaching intended targets.

One of ESDC's core responsibilities is to provide high-quality, timely and efficient services to clients. Equipping our leaders and employees with the knowledge and skills to address performance measurement will support the department's goal of being a higher performing organization. Being a higher performing organization will only lead to better services to the Canadians we serve.

3.0 Background Statement – Optional, but recommended. Provide a historical overview of why this training is necessary.

BDSB is comprised of five programs and all play a crucial part contributing to overall client

service. It has been identified that the program Operational Plans could be stronger at identifying targets with real activities to help achieve the intended goals. This training will enable everyone involved with the planning process to develop a more meaningful plan that keeps the strategy focused on the clients. The new techniques will help teams quickly recognize and assess whether current actions are having an impact or not, and if not, what the next steps should be.

4.0 Scope – Must be included. Give a detailed description of the work by editing the below sections (A-D) to suit your needs. List the course objectives and content/topics.

A. Scope: Session Structure and Content

Each and every session taught will cover all of the following topics, regardless of the delivery method and language. The total duration of each session will be no more than **22.5** hours. Contractor’s facilitators will present each topic for the duration identified below.

- Provides information on the **PuMP Performance Measurement Blueprint methodology** training. The estimated duration is 22.5 hours which includes 2 days of training followed by 1 day of interactive activities. This last day of engagement is approximately **6.5** hours that allows participants to ask questions and engage in exercises related to our business.

B. Scope: Languages

The Contractor will provide materials in English and the facilitator will be able to communicate fluently in English to match the needs of the training participants. The Project Authority knows that **100 percentage** of the workshop will be in English, as the WT Region is unilingual.

C. Scope: Facilitators

The Contractor will provide one specialist facilitator and ensure she meets the minimum qualifications listed below. The Project Authority will approve all individual facilitators before each teaches her first session under the contract, and request replacements if required. If a facilitator meets all minimum criteria for multiple topics, he or she may deliver those multiple topics. The contractor will own all Intellectual Property (IP) and no new IP will be created.

- **Louise Watson with Adura Strategy is the only facilitator in Canada certified in the PuMP methodology. Louise has 20 years of business and marketing experience. She is a licensed trainer for PuMP and a certified Emotional Intelligence in Action facilitator. She holds PuMP workshops throughout the year across Canada. Please see this link for her qualifications:**

<https://adurastrategy.com/about/louise-watson/>

Facilitator expectations

Each facilitator must present information in a clear and concise manner, explaining the content to ensure all learners understand the key topics listed in this document.

Facilitator scheduling

The Contractor will ensure that all facilitators are at the scheduled location and ready to present at the scheduled date and time.

D. Scope: Logistics and Review

All Sessions

- a. Accommodations for special needs: To better serve learners who require special accommodations, the Project Authority and the Contractor will work together to develop options to help the individual learn and participate effectively. The Project Authority, consulting with the Contractor, will choose the best course of action for the specific need. The Project Authority will assume all financial responsibility for implementing its decision. The Contractor will contribute its best efforts and the resources of its organization to implement the decision.
- b. Session evaluations: The Project Authority is responsible for all session evaluations. The Project Authority will collect participant session evaluations and will review the evaluations it collects from participants and, when necessary, provide its feedback to the Contractor.
- c. Auditing of sessions: The Project Authority reserves the right to audit any sessions held, assess the session content and review facilitator performance.

In-Person Sessions

- a. Session timeframes: In-person sessions are to take place during business hours (between 8:30 am and 4:30 pm) in the time zone where the session occurs, for a total of 8 hours per day, including a 15-minute morning break, 45 minutes for lunch and a 15-minute afternoon break. The total time is not to exceed 24 hours (8 hours per day, 3 days).
- b. Minimum classroom requirements: Whenever the Contractor provides a classroom, it will be capable of training up to 30 participants. The room will be suitable for training, including proper seating and tables. The room will have a computer, a projector and a screen, for use of any necessary media during training. In addition, there will be a whiteboard (6' x 4') for a mind-mapping exercise and each learner table will have a flip chart.
- c. Estimated frequency: The Project Authority estimates it will require approximately **two** in-person sessions each year, depending on circumstances and budget.

Facilitated On-line Distance Learning Delivery (Webinar) Sessions – NOT APPLICABLE

- a. ~~Delivery method: The Contractor will deliver the training through a facilitated on-line real-time method, using a webinar computer application. This will let learners participate from their workstations, see and hear presentation information in real time, and ask questions in real time. All technology used in course content and delivery will meet the Project Authority's IT standards, as attached, or be platform independent.~~
- b. ~~Session length: The length of the sessions will be **XX** hours per day for a total of **XX** hours (over **XX** days), including a **5-10 minute break every 45-60 minutes.**~~
- c. ~~Recorded version of the on-line learning: The Contractor will record two (2) on-line sessions (webinars), one in each official language. The Contractor will make these recordings permanently available to ESDC employees on-line, accessible from any ESDC workstation. The Contractor will ensure access to the recorded version is compatible with ESDC's computer network, per the Project Authority's IT standards, as attached.~~

5.0 Anticipated Locations – Optional. For in-person training, it is advisable to list the planned locations (cities) that require training.

- Western Region. **Cities: Vancouver and Edmonton**

The Western Region does not have capabilities to host the in-person training sessions in its own facilities. The Project Authority will be responsible to book external facilities determined and arranged for by the Contractor. These facilities must meet the minimum requirements detailed in the Scope section above.

6.0 Contact Period – Must be included. Training sessions can take place any time during this period.

The contract period is estimated to be from the date of contract award until March 31, 2020, with **one** irrevocable twelve- (12-) month option periods.

Initial Period: Date of Contract Award to March 31, 2020.

Option 1: Additional 12 month period after the Initial Period above ends. Assuming we can apply this to the 2020-2021 fiscal year.

7.0 Deadlines – Must be included. Complete the following table.

Requirement	Timeline
Project Authority to contact Contractor, in writing, to request a session	At least 20 business days before the requested session start date
Project Authority to submit Participant List, in writing, to Contractor (the Project Authority will aim for a minimum of 24 and maximum of 30 participants per session)	At least 5 business days before scheduled session start date
Project Authority to notify Contractor, in writing, to cancel a scheduled course session	At least 15 business days before scheduled session start date, with no charge whatsoever Within 14 business days before scheduled session start date, with reduced charge
Contractor to send course materials electronically to all registered Participants (to match the delivery language of the session)	Not applicable
Contractor to e-mail to the Project Authority a copy of the Attendance List (must include training title, session dates, Contractor name, participant names and participant signatures)	Not more than 30 business days after the end of the session Note: for webinars, discuss and detail your specific expectations.
Project Authority can send request to Contractor, in writing, for a replacement facilitator	At any time during the contract, with at least 10 business days' notice for the requested facilitator change to take effect (Not possible, as Louise is the only PuMP certified facilitator at Adura Strategy and Adura Strategy is the only company offering this training in Canada)
Contractor can ask to introduce a new facilitator, by sending a written request for approval to the Project Authority	At any time during the contract, with at least 10 business days' notice for the Project Authority to respond to the request (Not possible, as Louise is the only PuMP certified facilitator at Adura Strategy and Adura Strategy is the only company offering this training in Canada)
Project Authority to notify Contractor, in writing, of the exact needs of any special accommodations learner	At least 5 business days prior to the scheduled session start date that the

Requirement	Timeline
	learner requiring the special accommodations will attend
Contractor to address concerns (from Session Evaluations/Audits) as submitted in writing by Project Authority, to Project Authority's satisfaction	Before the next scheduled session begins

Best Practices for Writing a Training Statement of Work

Facilitators

In addition to the details provided in the Statement of Work, ESDC should request a list of facilitators and their résumés during the Request for Proposals or (if sole source) negotiations. This way, ESDC will be able to review and approve the proposed facilitators before the contract is signed. Contract clauses should allow the Project Authority to request replacement facilitators (i.e. to replace an unsatisfactory facilitator, with another qualified facilitator), at its sole discretion. Such clauses are included in Professional Services contracts. However, if ESDC uses a Non-Professional Services contract, then the contract does not include these clauses. This means that when the contract will be a Non-Professional Services contract, appropriate language should be included in the Statement of Work itself to explain how replacement facilitators will be handled.

Intellectual Property

Indicate who will [own Intellectual Property \(IP\)](#) created during the contract. The default in federal contracts is for contractors to own all IP (see the [Treasury Board Policy on Title to Intellectual Property Arising Under Crown Procurement Contracts](#)). However, if you anticipate a need to customize the course (in whole or in part) or to make it available to any other Contractors, ESDC may need to own certain IP. Consult the ESDC Procurement Team to discuss such needs.

Accessibility

Ensure that accessibility is addressed, and include references to any policies and standards that may apply.

For more information on accessible content, refer to the [Standard on Web Accessibility](#), the [Accessibility Centre of Excellence \(ACE\)](#), and the [Procurement Innovations Centre of Expertise](#).

Basis of Payment

The ESDC Procurement Team's preferred approach for payment/invoicing on large training contracts is for the Contractor to invoice per session, and not per participant. It is much simpler and less prone to dispute because both parties track the number of sessions delivered, rather than focusing on the exact number of participants attending.

This session-based payment approach reduces uncertainty and risk for both the Contractor and the Project Authority, because the price paid will depend upon the volume of sessions and not the volume of individual learners. This lower level of risk and uncertainty may result in more favourable pricing for the Crown. It also reduces the need, from the Contractor's viewpoint, to have strict maximum/minimum participant limits.

The Basis of Payment is not part of the Statement of Work. Therefore, you do not need to include it anywhere in your draft. The Basis of Payment is determined in a contract clause, which the ESDC Procurement Team will include in the contract documents.