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.

**Insert title here.**

# 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 **XX** training is to **[complete the sentence].**

This training will **[list relevant outcomes].**

This training will provide relevant information and explanations of **[list high-level topics].**

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

**Insert background statement here.**

# 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 **XX** hours. Contractor’s facilitators will present each topic for the duration identified below.

* **Topic Title 1** – Provides information on **XX Topic**. The estimated duration is **XX** hours, including an interactive presentation of approximately **XX** hours that allows participants to ask questions and engage in related exercises, followed by approximately **XX** hours for additional discussion, questions and answers.
  + **Provide a more detailed breakdown of Topic 1 here, if required. Exactly what detailed learning elements must the provider include? In what order and detail?**
* **Topic Title 2 –** Etc.

All course content must comply with the **[list relevant policies or legislation here]**.

## B. Scope: Languages

The Contractor will provide materials in either of the two official languages and facilitators must be able to communicate fluently in either of the two official languages (i.e. French or English) to match the language of the training session. The Project Authority estimates that **XX percentage** of the courses will be in English, and the remainder in French.

## C. Scope: Facilitators

The Contractor will provide a team of **XX** specialist facilitators and ensure they meet the minimum qualifications listed below. The Project Authority will approve all individual facilitators before each teaches his or 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.

* **Topic Title 1** – **List any required facilitator qualifications, e.g. federal security clearance, professional certification or number of years’ experience, number of similar training sessions previously delivered.**

### 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

1. 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.
2. 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.
3. 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

1. 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 **XX** hours perday, **including a 15-minute morning break, 45 minutes for lunch and a 15-minute afternoon break.** The total time is not to exceed **XX** hours (**XX** hours per day, **XX** days).
2. Minimum classroom requirements:Whenever the Contractor provides a classroom, it will be capable of training up to **XX** 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 and the Internet during training. **List other room requirements here.**
3. Estimated frequency: The Project Authority estimates it will require approximately **XX** in-person sessions each year, depending on circumstances.

### Facilitated On-line Distance Learning Delivery (Webinar) Sessions

1. 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.
2. Session length: The length of the sessions will be **XX** hoursper day for a total of **XX** hours(over **XX** days), including **a 5-10 minute break every 45-60 minutes.**
3. Recorded version of the on-line learning: The Contractor will record two (2) on-line sessions (webinars), one in each official language. The Contactor 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.

* National Capital Region of Canada. **Cities:**
* Atlantic Region. **Cities:**
* Quebec. **Cities:**
* Ontario. **Cities:**
* Western Region. **Cities:**

ESDC will host approximately **XX percentage** of the in-person training sessions in its own facilities **[it is best to list this percentage by region, if it varies greatly by region]**. The Project Authority will be responsible to book ESDC training rooms. The remaining sessions will take place in 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 **DATE, YEAR**, with **XX** irrevocable twelve- (12- ) month option periods.

Initial Period: Date of Contract Award – **XX months from Contract Award**.

Option 1: Additional 12 month period after the Initial Period above ends.

Option 2: Additional 12-month period after Option 1 above ends.

Option 3: **Etc.**

# 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 **XX** 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 XX and maximum of XX participants per session) | At least **XX** business days beforescheduled session start date |
| Project Authority to notify Contractor, in writing, to cancel a scheduled course session | At least **XX** business days before scheduled session start date, with no charge whatsoever  At least **XX** business days before scheduled session start date, with reducedcharge |
| Contractor to send course materials electronically to all registered Participants (to match the delivery language of the session) | At least 2 business days before the scheduled session start date |
| 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 **XX** 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 **XX** business days’ notice for the requested facilitator change to take effect |
| 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 **XX** business days’ notice for the Project Authority to respond to the request |
| 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 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)](http://iservice.prv/eng/finance/ip/ip_centre_excellence.shtml) 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](http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=13697&section=text)). 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](https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=23601), the [Accessibility Centre of Excellence (ACE)](http://iservice.prv/eng/imit/ace/index.shtml), and the [Procurement Innovations Centre of Expertise](http://iservice.prv/eng/finance/purchasing/procurement_innovations_centre.shtml#accessibility).

# 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.