

RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:
**Bid Receiving Public Works and Government
Services Canada/Réception des soumissions
Travaux publics et Services gouvernementaux
Canada**
Cabot Place, Phase II
Box 4600
St. John's, NL
A1C 5T2
Bid Fax: (709) 772-4603

Request For a Standing Offer
Demande d'offre à commandes

Regional Individual Standing Offer (RISO)
Offre à commandes individuelle régionale (OCIR)

Canada, as represented by the Minister of Public Works and
Government Services Canada, hereby requests a Standing Offer
on behalf of the Identified Users herein.

Le Canada, représenté par le ministre des Travaux Publics et
Services Gouvernementaux Canada, autorise par la présente,
une offre à commandes au nom des utilisateurs identifiés
énumérés ci-après.

Comments - Commentaires

Vendor/Firm Name and Address
**Raison sociale et adresse du
fournisseur/de l'entrepreneur**

Issuing Office - Bureau de distribution
PWGSC / TPGSC - Nfld. Region
Cabot Place, Phase II, 6th Floor
Box 4600
St. John's, NL
A1C 5T2

Title - Sujet RISO- Vocational Rehab Services	
Solicitation No. - N° de l'invitation G1169-110019/A	Date 2012-12-18
Client Reference No. - N° de référence du client G1169-110019	GETS Ref. No. - N° de réf. de SEAG PW-\$XAQ-031-5714
File No. - N° de dossier XAQ-1-34335 (031)	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2013-01-28	
Time Zone Fuseau horaire Newfoundland Standard Time NST	
Delivery Required - Livraison exigée See Herein	
Address Enquiries to: - Adresser toutes questions à: Baird, Janice	Buyer Id - Id de l'acheteur xaq031
Telephone No. - N° de téléphone (709)772-2999 ()	FAX No. - N° de FAX (709)772-4603
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: 165 Duckworth Street Sir Humphrey Gilbert Building St. John's NL A1A 2Y5	
Security - Sécurité This request for a Standing Offer does not include provisions for security. Cette Demande d'offre à commandes ne comprend pas des dispositions en matière de sécurité.	

Instructions: See Herein

Instructions: Voir aux présentes

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

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PART 1 - GENERAL INFORMATION

1. Introduction

The Request for Standing Offers (RFSO) is divided into seven parts plus attachments and annexes, as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Offeror Instructions: provides the instructions applicable to the clauses and conditions of the RFSO;
- Part 3 Offer Preparation Instructions: provides offerors with instructions on how to prepare their offer to address the evaluation criteria specified;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria which must be addressed in the offer, if applicable, and the basis of selection;
- Part 5 Certifications: includes the certifications to be provided;
- Part 6 Security, Financial and Insurance Requirements: includes specific requirements that must be addressed by offerors; and
- Part 7 7A, Standing Offer, and 7B, Resulting Contract Clauses:
 7A, includes the Standing Offer containing the offer from the Offeror and the applicable clauses and conditions;
 7B, includes the clauses and conditions which will apply to any contract resulting from a call-up made pursuant to the Standing Offer.

The Annexes include the Statement of Work the Basis of Payment and any other annexes.

2. Summary

The Canada Pension Plan Disability (CPPD) Benefit, delivered by Service Canada on behalf of Human Resources and Skills Development Canada (HRSDC), is payable to persons prevented from working because of a severe and prolonged physical or mental disability. "Severe" means, the person is unable to regularly work at any substantially gainful employment. "Prolonged" means, the disability is likely to be of an indefinite duration. To be eligible for benefits, a person must also have made valid CPP contributions in four of the last six years (or three out of the last six years in the case of individuals with 25 years or more of contributions), must be under the age of 65, and must apply in writing.

The Canada Pension Plan Disability Vocational Rehabilitation Program is available on a voluntary basis to selected CPPD beneficiaries (also referred to CPPD clients), whose medical condition has stabilized and who are motivated to return to work.

The CPP Disability Vocational Rehabilitation (VR) Program was established to provide individualized, reasonable and cost-effective rehabilitation services to beneficiaries with all types of disabilities, whose medical condition is stable and who have a reasonable expectation of successfully returning to work at the substantially gainful level.

CPPD beneficiaries who are trying to return to substantially gainful employment can expect the Program to respond by assisting them to achieve the best possible employment outcomes.

The objectives to be achieved by the service provider are:

- to provide Vocational Rehabilitation Services to selected CPP disability beneficiaries, to regain the capacity to return to substantially gainful employment, and
- to assist CPP disability beneficiaries in obtaining substantially gainful employment within their capacity and ability.

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Pursuant to section 01 of Standard Instructions 2006 and 2007, Offerors must submit a complete list of names of all individuals who are currently directors of the Offeror. Furthermore, as determined by the Special Investigations Directorate, Departmental Oversight Branch, each individual named on the list may be requested to complete a Consent to a Criminal Record Verification form and related documentation.

The procurement is limited to Canadian services.

3. Security Requirement

There is a security requirement associated with the requirement of the Standing Offer. For additional information, see Part 6 - Security, Financial and Insurance Requirements, and Part 7 - Standing Offer and Resulting Contract Clauses.

4. Debriefings

After issuance of a standing offer, offerors may request a debriefing on the results of the request for standing offers process. Offerors should make the request to the Standing Offer Authority within 15 working days of receipt of the results of the request for standing offers process. The debriefing may be in writing, by telephone or in person.

PART 2 - OFFEROR INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the Request for Standing Offers (RFSO) 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>) issued by Public Works and Government Services Canada.

Offerors who submit an offer agree to be bound by the instructions, clauses and conditions of the RFSO and accept the clauses and conditions of the Standing Offer and resulting contract(s).

The 2006 (2012-11-19) Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the RFSO.

Subsection 5.4 of 2006, Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, is amended as follows:

Delete: sixty (60) days

Insert: one hundred and eighty (180) days

2. Submission of Offers

Offers must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated on page 1 of the Request for Standing Offers.

Due to the nature of the Request for Standing Offers, transmission of offers by facsimile to PWGSC will not be accepted.

3. Enquiries - Request for Standing Offers

All enquiries must be submitted in writing to the Standing Offer Authority no later than ten (10) business days before the Request for Standing Offers (RFSO) closing date. Enquiries received after that time may not be answered.

Offerors should reference as accurately as possible the numbered item of the RFSO to which the enquiry relates. Care should be taken by offerors 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 questions or may request that offerors do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all offerors. Enquiries not submitted in a form that can be distributed to all offerors may not be answered by Canada.

4. Applicable Laws

The Standing Offer (SO) and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in Newfoundland and Labrador.

Offerors may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their offer, 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 offerors.

PART 3 - OFFER PREPARATION INSTRUCTIONS

1. Offer Preparation Instructions

Canada requests that offerors provide their offer in separately bound sections as follows:

Section I: Technical Offer (3 hard copies (with pages numbered) and 3 soft copies on CD or DVD)
Section II: Financial Offer (1 hard copy)
Section III: Certifications (1 hard copy)

If there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

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

Canada requests that offerors follow the format instructions described below in the preparation of their offer.

- (a) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- (b) use a numbering system that corresponds to that of the Request for Standing Offers.

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process Policy on Green Procurement

(<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>).

To assist Canada in reaching its objectives, offerors should:

- 1) use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
- 2) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.

Section I: Technical Offer

In their technical offer, offerors should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

Section II: Financial Offer

Offerors must submit a separate financial offer for EACH AREA where they propose to offer Vocational Rehabilitation services.

Offerors must submit their financial offer in accordance with the table in Annex C, Basis of Payment.

The total amount of Goods and Services Tax or Harmonized Sales Tax must be shown separately, if applicable.

Section III: Certifications

Offerors must submit the certifications required under Part 5.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures

- (a) Offers will be assessed in accordance with the entire requirement of the Request for Standing Offers including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the offers.

1.1. Technical Evaluation

- 1.1.1 Mandatory Technical Criteria
See Annex B - Evaluation
- 1.1.2 Point Rated Technical Criteria
See Annex B - Evaluation

1.2 Financial Evaluation

For offer evaluation and offeror selection purposes only, the evaluated price of an offer will be determined in accordance with the Basis of Payment detailed in Annex C.

- 1.2.1 Firm Price and/or Rates
The Offeror is required to submit firm prices, rates or both that will apply for the entire period of the Standing Offer.

2. Basis of Selection

For each area, responsive offers will be ranked in ascending order of evaluated prices and will be recommended for issuance of a SO. If an Offeror has more than one responsive offer (for different Areas), only one SO which will combine the specific areas will be recommended for issuance to that Offeror.

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

- 1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation;
 - b. meet all mandatory criteria; and
 - c. obtain the required minimum of 119 points overall for the technical evaluation criteria which are subject to point rating.

The rating is performed on a scale of 170 points.

- 2. Bids not meeting (a), (b) and (c) will be declared non-responsive.
- 3. The evaluation 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 Standing Offer.

3. Number of Offers

It is anticipated that up to three (3) Offers will be recommended for award in EACH AREA.

3.1 Issuance of Offers

Offerors are advised that Offers will be issued as soon as confirmation of required Designated Organization Screening clearances are obtained in accordance with Part 6.

Some Offerors may already be in possession of the required clearance, and some may take some time in order to obtain the required clearance.

This could potentially impact on the distribution of work in accordance with Part 7A Standing Offer, Section 7 Call-up procedures, as the number of Offerors in an Area may change as required security clearances are obtained.

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PART 5 - CERTIFICATIONS

Offerors must provide the required certifications and related documentation to be issued a standing offer. Canada will declare an offer non-responsive if the required certifications and related documentation are not completed and submitted as requested.

Compliance with the certifications offerors provide to Canada is subject to verification by Canada during the offer evaluation period (before issuance of a standing offer) and after issuance of a standing offer. The Standing Offer Authority will have the right to ask for additional information to verify offerors' compliance with the certifications before issuance of a standing offer. The offer will be declared non-responsive if any certification made by the Offeror is untrue, whether made knowingly or unknowingly. Failure to comply with the certifications or to comply with the request of the Standing Offer Authority for additional information will also render the offer non-responsive.

See Annex D Certifications

PART 6 - SECURITY, FINANCIAL AND INSURANCE REQUIREMENTS

1. Security Requirement

1. Before issuance of a standing offer, the following conditions must be met:

- (a) the Offeror must hold a valid organization security clearance as indicated in Part 7A - Standing Offer;
- (b) the Offeror's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in Part 7A - Standing Offer;
- (c) the Offeror must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.

2. Offerors are reminded to obtain the required security clearance promptly. Any delay in the issuance of a standing offer to allow the successful offeror to obtain the required clearance will be at the entire discretion of the Standing Offer Authority.

3. For additional information on security requirements, bidders should consult the "Security Requirements for PWGSC Bid Solicitations - Instructions for Bidders" (<http://www.tpsgc-pwgsc.gc.ca/app-acq/lc-pl/lc-pl-eng.html#a31>) document on the Departmental Standard Procurement Documents Web site.

2. Financial Capability

SACC Manual clause M9033T(2011-05-16) Financial Capability

3. Insurance Requirements

The Offeror must provide a letter from an insurance broker or an insurance company licensed to operate in Canada stating that the Offeror, if issued a standing offer as a result of the request for standing offer, can be insured in accordance with the Insurance Requirements specified in Annex F.

If the information is not provided in the offer, the Standing Offer Authority will so inform the Offeror and provide the Offeror with a time frame within which to meet the requirement. Failure to comply with the request of the Standing Offer Authority and meet the requirement within that time period will render the offer non-responsive.

PART 7 - STANDING OFFER AND RESULTING CONTRACT CLAUSES

A. STANDING OFFER

1. Offer

The Offeror offers to fulfill the requirement in accordance with the Statement of Work at Annex "A".

2. Security Requirement

2.1 SECURITY REQUIREMENT FOR CANADIAN SUPPLIER: PWGSC FILE # G1169-110019

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid Designated Organization Screening (DOS) with approved Document Safeguarding at the level of PROTECTED B, issued by the Canadian Industrial Security Directorate, Public Works and Government Services Canada.
2. The Contractor/Offeror personnel requiring access to PROTECTED information, assets or work site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
3. The Contractor/Offeror MUST NOT utilize its Information Technology systems to electronically process, produce or store PROTECTED information until the CISD/PWGSC has issued written approval. After approval has been granted or approved, these tasks may be performed at the level of PROTECTED B.
4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
5. The Contractor/Offeror must comply with the provisions of the:
 - (a) Security Requirements Check List and security guide (if applicable), attached at Annex E;
 - (b) Industrial Security Manual (Latest Edition)

3. Standard Clauses and Conditions

All clauses and conditions identified in the Standing Offer and resulting contract(s) 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>) issued by Public Works and Government Services Canada.

3.1 General Conditions

2005 (2012-11-19) General Conditions - Standing Offers - Goods or Services, apply to and form part of the Standing Offer.

3.1.1 Supplemental General Conditions

4008 (2008-12-12) Personal Information, apply to and form part of the Standing Offer

3.1.2 Protection and Security of Data stored in Databases

1. The Contractor must ensure that all the databases containing any information related to the Work are located in Canada or, if the Contracting Authority has first consented in writing, in another country where:
 - a. equivalent protections are given to personal information as in Canada under legislation such as the *Privacy Act*, R.S. 1985, c. P-21, and the *Personal Information Protection and Electronic Documents Act*, S.C. 2000, c. 5, and under any applicable policies of the Government of Canada; and
 - b. the laws do not allow the government of that country or any other entity or person to seek or obtain the right to view or copy any information relating to the Contract without first obtaining the Contracting Authority's written consent.

In connection with giving its consent to locating a database in another country, the Contracting Authority may, at its option, require the Contractor to provide a legal opinion (from a lawyer qualified in the foreign country) that the laws in that country meet the above requirements, or may require the Contractor to pay for Canada to obtain such a legal opinion. Canada has the right to reject any request to store Canada's data in a country other than Canada if there is any reason to be concerned about the security, privacy, or integrity of Canada's data. Canada may also require that any data sent or processed outside of Canada be encrypted with Canada-approved cryptography and that the private key required to decrypt the data be kept in Canada in accordance with key management and storage processes approved by Canada.

2. The Contractor must control access to all databases on which any data relating to the Contract is stored so that only individuals with the appropriate security clearance are able to access the database, either by using a password or other form of access control (such as biometric controls).
3. The Contractor must ensure that all databases on which any data relating to the Contract is stored are physically and logically independent (meaning there is no direct or indirect connection of any kind) from all other databases, unless those databases are located in Canada (or in another country approved by the Contracting authority under subsection 1) and otherwise meet the requirements of this article.
4. The Contractor must ensure that all data relating to the Contract is processed only in Canada or in another country approved by the Contracting Authority under subsection 1.
5. The Contractor must ensure that all domestic network traffic (meaning traffic or transmissions initiated in one part of Canada to a destination or individual located in another part of Canada) is routed exclusively through Canada, unless the Contracting Authority has first consented in writing to an alternate route. The Contracting Authority will only consider requests to route domestic traffic through another country that meets the requirements of subsection 1.
6. Despite any section of the General Conditions relating to subcontracting, the Contractor must not subcontract (including to an affiliate) any function that involves providing a subcontractor with access to any data relating to the Contract unless the Contracting Authority first consents in writing.

3.2 Standing Offers Reporting

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The Offeror must compile and maintain records on its provision of goods, services or both to the federal government under contracts resulting from the Standing Offer. This data must include all purchases paid for by a Government of Canada Acquisition Card.

The Offeror must provide this data in accordance with the reporting requirements detailed in Annex G. If some data is not available, the reason must be indicated. If no goods or services are provided during a given period, the Offeror must still provide a "NIL" report.

The data must be submitted on a quarterly basis to the Standing Offer Authority.

The quarterly reporting periods are defined as follows:

April 1 to June 30;
July 1 to September 30;
October 1 to December 31;
January 1 to March 31.

The data must be submitted to the Standing Offer Authority no later than 15 calendar days after the end of the reporting period.

4. Term of Standing Offer

4.1 Period of the Standing Offer

The period for making call-ups against the Standing Offer is from April 1, 2013 to March 31, 2016.

4.2 Extension of Standing Offer

The Standing Offer is authorized for use beyond the initial period, the Offeror offers to extend its offer for up to one (1) additional one (1) year periods, from April 01, 2016 to March 31, 2017 under the same conditions and at the rates or prices specified in the Standing Offer, or at the rates or prices calculated in accordance with the formula specified in the Standing Offer.

The Offeror will be advised of the decision to authorize the use of the Standing Offer for an extended period by the Standing Offer Authority within 60 days before the expiry date of the Standing Offer. A revision to the Standing Offer will be issued by the Standing Offer Authority.

5. Authorities

5.1 Standing Offer Authority

The Standing Offer Authority is:

Name: Janice Baird
Title: Supply Specialist
Public Works and Government Services Canada

Address: The John Cabot Building, 7th Floor
10 Barter's Hill, P.O. Box 4600
St. John's, NL A1C 5T2

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Telephone: 709-772-2999
Facsimile: 709-772-4603
E-mail address: janice.baird@pwgsc.gc.ca

(Contact information provided for the purpose of enquiries only. Offers must be submitted to the address indicated on the cover page of the document)

The Standing Offer Authority is responsible for the establishment of the Standing Offer, its administration and its revision, if applicable. Upon the making of a call-up, as Contracting Authority, he is responsible for any contractual issues relating to individual call-ups made against the Standing Offer by any Identified User.

5.2 Project Authority

The Project Authority for the Standing Offer is identified in the call-up against the Standing Offer.

The Project Authority is the representative of the department or agency for whom the Work will be carried out pursuant to a call-up against the Standing Offer and is responsible for all the technical content of the Work under the resulting Contract.

5.3 Offeror's Representative

Offeror is to complete table below and submit with their bid.

Contact for:	Name	Telephone	Email
Contracting issues			
Technical issues			
Invoicing issues			

6. Identified Users

The Identified User authorized to make call-ups against the Standing Offer is:

Human Resources and Skills Development Canada (HRSDC)
165 Duckworth Street, Sir Humphrey Gilbert Building
St. John's, NL A1A 2Y6

7. Call-up Procedures

Call-ups shall be issued on a proportional basis such that the highest-ranked Offeror receives the largest portion of the work. The Project Authority may issue call-ups in any order, to any Offeror, in accordance with the established percentages.

It is anticipated that up to three (3) offers will be recommended for award in EACH AREA. Depending on the number of Offers issued in each Area, the table below shall be used to assign the portion of work.

Number of Offerors	Proportion by % of call-ups Rank # 1	Proportion by % of call-ups Rank # 2	Proportion by % of call-ups Rank # 3	Proportion by % of call-ups Rank # 4	Proportion by % of call-ups Rank # 5	Client Discretion
1	100					
2	55	35				10
3	50	25	15			10

NOTE:

The number of Offerors in each geographic area may change as Offerors obtain the required Designated Organization Screening in accordance with Section 2. Offers will be issued immediately after evaluation to those Offerors who are already in possession of the required clearance. Depending on ranking and security clearance, the assignment of work as per table above may change.

Example:

3 compliant Offers are ranked, but only Offerors 2 and 3 have the required security clearance.

Offers will be issued as though there are only 2 Offerors:

Offeror 2 receiving Rank # 1, and Offeror 3 receiving Rank # 2.

Call-ups will be issued as per proportions above.

If Offeror 1 obtains clearance, the rankings will be readjusted as though there are 3 Offerors:

Offeror 1 receiving Rank # 1, Offeror 2 receiving Rank # 2, and Offeror 3 receiving Rank # 3.

Call-ups will be issued as per proportions above.

Offerors are advised that if proportions are exceeded by readjustment of rankings, the remaining assignment of work will NOT be readjusted. Offerors shall have no claims against Canada for adjustments to defined proportions as a result of delays in obtaining the required security clearance.

Example:

In the scenario above, if Offeror 3 (ranked # 2) receives 25% of the work, and is then readjusted to Rank # 3 when Offeror 1 obtains clearance, it has already exceeded the proportion of work, and the extra 10% will be adjusted within the remaining proportions.

Adjustments to proportion of work rankings will be confirmed through formal Standing Offer amendments issued by the Standing Offer Authority.

8. Call-up Instrument

The Work will be authorized or confirmed by the Identified User(s) using form PWGSC-TPSGC 942, Call-up Against a Standing Offer.

9. Limitation of Call-ups

Individual call-ups against the Standing Offer must not exceed \$50,000.00 (Goods and Services Tax or Harmonized Sales Tax included).

10. Financial Limitation

Not applicable to this requirement.

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 call up against the Standing Offer, including any annexes;
- b) the articles of the Standing Offer;
- c) the general conditions 2005 (2012-07-16), General Conditions - Standing Offers - Goods or Services
- d) the supplemental general conditions 4008 Personal Information (2008-12-12)
- e) the general conditions 2035 General Conditions - Higher Complexity - Services (2012-07-16);
- f) Annex A, Statement of Work ;
- g) Annex C, Basis of Payment;
- h) Annex E, Security Requirements Check List;

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- i) Annex F, Insurance Requirements;
- j) the Offeror's offer dated _____ (insert date of offer), *(if the offer was clarified or amended, insert at the time of issuance of the offer: "as clarified on _____" or "as amended _____". (insert date(s) of clarification(s) or amendment(s) if applicable).*

12. Certifications

12.1 Compliance

Compliance with the certifications and related documentation provided by the Offeror is a condition of authorization of the Standing Offer and subject to verification by Canada during the term of the Standing Offer and of any resulting contract that would continue beyond the period of the Standing Offer. In the event that the Offeror does not comply with any certification, provide the related documentation or if it is determined that any certification made by the Offeror in its offer is untrue, whether made knowingly or unknowingly, Canada has the right to terminate any resulting contract for default and set aside the Standing Offer.

12.2 SACC Manual Clauses

M3020C Status and Availability of Resources (2010-01-11)

M3060C Canadian Content Certification (2008-05-12)

13. Applicable Laws

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in _____. (Insert the name of the province or territory as specified by the offeror in its offer, if applicable).

14. Delivery Requirements Outside a CLCSA

The resulting Standing Offers are not to be used for deliveries within a Comprehensive Land Claims Settlement Area (CLCSA). All requirements for delivery within a CLCSA are to be submitted to the Department of Public Works and Government Services for individual processing.

B. RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of any contract resulting from a call-up against the Standing Offer.

1. Statement of Work

The Contractor must perform the Work described in the call-up against the Standing Offer.

2. Standard Clauses and Conditions**2.1 General Conditions**

2035 (2012-11-19), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

2.2 Supplemental General Conditions

4008 Personal Information (2008-12-12)), apply to and form part of the Contract.

2.3 Protection and Security of Data stored in Databases

The Contractor must ensure that all the databases containing any information related to the Work are located in Canada or, if the Contracting Authority has first consented in writing, in another country where:

a) equivalent protections are given to personal information as in Canada under legislation such as the Privacy Act, R.S. 1985, c. P-21, and the Personal Information Protection and Electronic Documents Act, S.C. 2000, c. 5, and under any applicable policies of the Government of Canada; and

b) the laws do not allow the government of that country or any other entity or person to seek or obtain the right to view or copy any information relating to the Contract without first obtaining the Contracting Authority's written consent.

In connection with giving its consent to locating a database in another country, the Contracting Authority may, at its option, require the Contractor to provide a legal opinion (from a lawyer qualified in the foreign country) that the laws in that country meet the above requirements, or may require the Contractor to pay for Canada to obtain such a legal opinion. Canada has the right to reject any request to store Canada's data in a country other than Canada if there is any reason to be concerned about the security, privacy, or integrity of Canada's data. Canada may also require that any data sent or processed outside of Canada be encrypted with Canada-approved cryptography and that the private key required to decrypt the data be kept in Canada in accordance with key management and storage processes approved by Canada.

The Contractor must control access to all databases on which any data relating to the Contract is stored so that only individuals with the appropriate security clearance are able to access the database, either by using a password or other form of access control (such as biometric controls).

The Contractor must ensure that all databases on which any data relating to the Contract is stored are physically and logically independent (meaning there is no direct or indirect connection of any kind) from all other databases, unless those databases are located in Canada (or in another country approved by the Contracting authority under subsection 1) and otherwise meet the requirements of this article.

The Contractor must ensure that all data relating to the Contract is processed only in Canada or in another country approved by the Contracting Authority under subsection 1.

The Contractor must ensure that all domestic network traffic (meaning traffic or transmissions initiated in one part of Canada to a destination or individual located in another part of Canada) is routed exclusively through Canada, unless the Contracting Authority has first consented in writing to an alternate route. The Contracting Authority will only consider requests to route domestic traffic through another country that meets the requirements of subsection 1.

Despite any section of the General Conditions relating to subcontracting, the Contractor must not subcontract (including to an affiliate) any function that involves providing a subcontractor with access to any data relating to the Contract unless the Contracting Authority first consents in writing.

3. Term of Contract

3.1 Period of the Contract

The Work must be completed in accordance with the call-up against the Standing Offer.

4. Payment

4.1 Basis of Payment

The Contractor will be paid firm hourly rates as SPECIFIED IN ANNEX C, for work performed in accordance with the Contract. Customs duties are included and Goods and Services Tax or Harmonized Sales Tax (GST/HST) is extra, if applicable.

Travel and Living Expenses

The Contractor will be reimbursed for the authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for overhead or profit, in accordance with the meal, private vehicle and incidental expense allowances specified in Appendices B, C and D of the Treasury Board Travel Directive, and with the other provisions of the directive referring to "travellers", rather than those referring to "employees".

All travel must have the prior authorization of the Project Authority. All payments are subject to government audit.

Other Direct Expenses

The Contractor will be reimbursed for the direct expenses reasonably and properly incurred in the performance of the Work. These expenses will be paid at actual cost without mark-up, upon submission of an itemized statement supported by receipt vouchers.

Option to Extend the Standing Offer

During the extended period of the Offer, the Offeror will be paid the firm hourly rates SPECIFIED IN ANNEX C to perform all the Work in relation to the Offer extension.

4.2 Limitation of Price

C6000C (2001-05-16) Limitation of Price

4.3 SACC Manual Clauses

A9117C T1204 - Direct Request by Customer Department (2007-11-30)

H1001C Multiple Payments (2008-05-12)

5. Invoicing Instructions

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 invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;

2. Invoices must be distributed as follows:

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(a) The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.

6. Insurance Requirements

The Contractor must comply with the insurance requirements specified in Annex F. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.

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

The Contractor must forward to the Contracting Authority within ten (10) days after the date of award of the Contract, a Certificate of Insurance evidencing the insurance coverage and confirming that the insurance policy complying with the requirements is in force. Coverage must be placed with an Insurer licensed to carry out business in Canada. The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

7. Specific Persons

The Contractor must provide the services of the following person(s) to perform the Work as stated in the Contract:

_____ (insert name(s) of person(s))

ANNEX A STATEMENT OF WORK

1. BACKGROUND:

The Canada Pension Plan Disability (CPPD) Benefit, delivered by Service Canada on behalf of Human Resources and Skills Development Canada (HRSDC), is payable to persons prevented from working because of a severe and prolonged physical or mental disability. "Severe" means, the person is unable to regularly work at any substantially gainful employment. "Prolonged" means, the disability is likely to be of an indefinite duration. To be eligible for benefits, a person must also have made valid CPP contributions in four of the last six years (or three out of the last six years in the case of individuals with 25 years or more of contributions), must be under the age of 65, and must apply in writing.

The Canada Pension Plan Disability Vocational Rehabilitation Program is available on a voluntary basis to selected CPPD beneficiaries (also referred to as CPPD clients), whose medical condition has stabilized and who are motivated to return to work.

In 1990, the Canada Pension Plan (CPP) initiated a Vocational Rehabilitation Pilot project in Ontario and British Columbia to assess the feasibility of implementing sections 69 and 70 of the CPP regulations. A year later, the project was expanded nationally to become the National Vocational Rehabilitation Project (NVRP).

According to the 1996 report of the Auditor General of Canada and the NVRP evaluation report, CPP had demonstrated the feasibility of implementing a permanent Vocational Rehabilitation Program with potential for expansion. In 1997-1998, the pilot project was expanded to each province for implementation, with regionalization completed in September 1998.

The current CPPD beneficiary profile indicates a broad section of working age adults are in receipt of benefits. The average age of beneficiaries is between 50 – 60 years of age with a quarter of beneficiaries under the age of 50. The top three primary medical conditions for CPPD beneficiaries are: mental disorders (28%); musculoskeletal system and connective tissue (25%); and diseases of the nervous system and sense organs (12%).

The Atlantic Region has been administering the Disability Vocational Rehabilitation Program since February 1998. The goal of this program is to assist selected CPPD beneficiaries regain the capacity to work and/or secure substantially gainful employment. Service Canada's Vocational Rehabilitation Case Managers (VRCMs) select, screen, refer and case manage appropriate clients. The external service provider (also referred to as bidder) is required to provide a range of vocational rehabilitation services in order to assist clients to become job ready, and obtain gainful employment. In partnership, the Service Canada VRCM, the service provider and the beneficiary will work collaboratively toward this end. It is anticipated that approximately eighty-five to one hundred and twenty CPPD clients from Atlantic Region will participate in the program on a yearly basis.

Service areas:

It is anticipated that the following areas will require services:

Area 1 - Newfoundland and Labrador (entire Province)

Area 2 - Nova Scotia and Prince Edward Island (entire Provinces)

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Area 3 - New Brunswick (entire Province) It is expected that the bidder will be able to provide services in both official languages for the province of New Brunswick.

2. PROGRAM DESCRIPTION:

The CPP Disability Vocational Rehabilitation (VR) Program was established to provide individualized, reasonable and cost-effective rehabilitation services to beneficiaries with all types of disabilities, whose medical condition is stable and who have a reasonable expectation of successfully returning to work at the substantially gainful level.

The two sections of the CPP Regulations that govern the delivery of vocational rehabilitation are:

SECTION 69:

"Where the Minister is of the opinion that a person who has been determined to be disabled within the meaning of the Act may benefit vocationally from reasonable rehabilitation measures, he may, from time to time, require that person to undergo such reasonable rehabilitation measures as he may specify."

SECTION 70:

"Where a person who has been determined to be disabled within the meaning of the Act fails without good cause to comply with any requirement of the Minister made under section 69, he may be determined to have ceased to be disabled at such time as the Minister may specify except that such time shall not be earlier than the day of failure to comply."

3. SERVICE PHILOSOPHY:

CPPD beneficiaries who are trying to return to substantially gainful employment can expect the Program to respond by assisting them to achieve the best possible employment outcomes. This is achieved through observance of the following principles:

- Adherence to the Hierarchy of Return to Work;
- Beneficiary participation in vocational rehabilitation is voluntary;
- Access to vocational rehabilitation services is not withheld based solely on the nature of the beneficiary's disability, age, length of time on the benefit, or area of residence in Canada;
- Qualities such as motivation, reliability and resilience are recognized as fundamental requirements for employment success;
- Beneficiaries are guided toward the most direct route to employment based on existing opportunities in the local labour market, thus ensuring quality, timely and cost-effective interventions;
- Services are individualized and tailored to each beneficiary's unique needs;
- Flexibility currently available within CPPD policy and legislation is used to maximize employment success;
- Services are provided with the highest ethical standards;
- Services foster client independence and participation, and beneficiaries bear responsibility to follow through on their vocational rehabilitation plan;
- Efforts are made to reduce barriers that impact on a beneficiary's ability to attend and successfully perform at work. Physicians and employers are key partners in addressing health, workplace and accommodation issues;
- Partnerships with co-insurers and other third party payers are sought to improve return to work outcomes for CPPD beneficiaries; and
- Consistent with broader trends in workforce support, a job development approach to job placement is to be considered when supporting clients with significant employment barriers.

4. OBJECTIVES:

The objectives to be achieved by the service provider are:

- to provide Vocational Rehabilitation Services to selected CPP disability beneficiaries, to regain the capacity to return to substantially gainful employment, and
- to assist CPP disability beneficiaries in obtaining substantially gainful employment within their capacity and ability.

5. SERVICE CANADA RESPONSIBILITY

The Service Canada Vocational Rehabilitation Case Manager (VRCM) will screen and refer suitable clients to the service provider for an accurate assessment of rehabilitation potential. With each referral, the Service Canada VRCM will provide the service provider with the following documentation:

- signed copy of the "Authorization to Disclose Information/Consent for Vocational Rehabilitation";
- copy of the rehabilitation profile summary;
- copy of relevant information on the disability file, including client information, recent medical reports and reason for referral;
- copy of the Service Canada letter to the physician introducing the program; and
- copy of Written Support for the participation in the program from the client's physician if obtained.

6. TASKS TO BE PERFORMED BY THE SERVICE PROVIDER:

Upon approval by the Service Canada VRCM, the service provider will provide vocational rehabilitation services collaboratively with the client and **will not proceed with any intervention or recommendation without the approval of the Service Canada VRCM.**

All referrals must be acknowledged in writing with indication of the assigned consultant. There should be no change in consultants without valid reason and prior approval by the Service Canada VRCM.

Generally, all tasks to be performed will fall within the phases outlined below:

- Assessment Phase
- Planning Phase
- Intervention Phase
- Employment Follow-up

However, it must be noted that the phases do not have to be sequential. If it is determined that a client may benefit from skipping a phase, this needs to be done only upon receiving prior approval by the Service Canada VRCM.

Note: The only exception is when the contract is for financial services only. In these instances the service provider will issue payment for the amount specified and invoice for 0.5 of an hour for issuing the payment.

Recommendations for services must be based on an objective assessment of the client and the Service Canada VRCM must be notified promptly of any risk or potential signs for failure.

It should be noted that the service provider may be required to provide comprehensive rehabilitation services (all phases) for some clients, while only specific services/phases may be required for others.

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All VR services provided to the client must be approved by the Service Canada VRCM. Frequency of reporting and monitoring will be established by the Service Canada VRCM.

If there is a significant change in the client's health status or rehabilitation plan, a new written consent will be obtained by the service provider to enable the client to continue participating in a Return to Work Program.

6.1 ASSESSMENT PHASE:

An initial assessment is required for all clients. However, if the necessary information is available from a co-insurer or other appropriate source wishing to partner, their report may be used at the discretion of the Service Canada VRCM. The information collected will demonstrate how the disability is affecting the client and if the client is an appropriate candidate for the program. Exploration of the medical, psychological, social, educational and vocational components must be included in this overall phase. If after the initial assessment, the recommendation is to proceed in developing an IWRP, it is mandatory that some components of the Vocational Confirmation / Exploration Activity be completed. All clients proceeding with the program, except some of those who are already working in an appropriate occupation, must research and confirm a suitable, realistic occupational goal prior to the approval of the IWRP and subsequent interventions. If information is insufficient, and further information is required, specialized assessments may be recommended. Often the need for these assessments will be evident after the initial assessment, but may be found to be necessary anywhere in the process.

6.1.1 INITIAL ASSESSMENT:

The initial assessment will focus on collecting and analyzing information from primary sources (in-person interview with client, in-person or telephone interview with the physician and if appropriate the employer) and secondary sources (reports of past professional interventions) to determine the client's potential for vocational rehabilitation. Each sub-task in this assessment must be completed, with the exception of some situations where clients are already working. In these cases, at the discretion of the Service Canada VRCM, some sub-tasks may not be required or only partially required depending on individual circumstances.

Initial Assessment:

- psycho-social profile
- description of clients home environment
- family situation and obligations
- medical and rehabilitative interventions
- education/vocational profile (including licenses)
- work history and transferable skills review
- financial situation as described by client and observed by service provider
- functional status
- motivation
- strengths and barriers
- Exploration of cost sharing opportunities
- recommendations

From the initial assessment, the service provider must provide the Service Canada VRCM with an accurate determination of the client's rehabilitation potential with one of the following specific recommendations in writing:

- the client has rehabilitation potential and is likely to succeed. The service provider should clarify if the client can return to work without assistance;
- the client has some rehabilitation potential but may be at risk of failure. Specify risk and mitigating factors;
- the client's potential is not clear. Further exploration is required. Specify steps/actions required; or

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- the client currently has little or no rehabilitation potential and should not participate in the program.

Note: If there is a need to clarify next steps being recommended for the client or to prevent any delays in organizational tasks, the service provider should contact the Service Canada VRCM for approval of the recommendations and clarify any immediate concerns or questions encountered after the initial assessment.

Deliverables:

The initial assessment should include:

- an Initial Assessment Report, including correspondence and documents obtained during the process;
- Physician's opinion, given the information provided, regarding the clients medical potential to participate in the program; and
- If deemed necessary, a physician's report addressing the client's diagnosis, treatment plan, prognosis, medical stability and physical precautions.

Outcome:

- to report on clients vocational rehabilitation potential
- if the decision to proceed is recommended, an outline of appropriate sub-activities in the vocational confirmation / exploration section (6.1.2) must be indicated along with an estimate of the hours of work necessary to conduct those activities. Any specialized assessments (6.1.3) recommended at this time, and their estimated costs, should also be specified.

Note: The service provider will perform no further work or incur further costs until authorized to do so by the Service Canada VRCM.

6.1.2 VOCATIONAL CONFIRMATION/EXPLORATION ACTIVITY:

This activity will include meeting (s) with the client and research to assist the client to confirm a realistic and attainable occupational choice or to assist the vocationally unfocused client explore realistic options.

The number of in-person client meetings will be dependent on the types of activities as recommended by the service provider in 6.1.1 and approved or directed by the Service Canada VRCM. Such meetings may be used to: prepare for any test or tools, which will be utilized, provide administration and guidance during such activities, conduct a follow-up counseling interview to interpret results, and facilitate the decision making process. The activities may include:

- labour market research *
- vocational interests
- aptitude testing
- vocational counseling

*Note: labour market research activity is mandatory. The client is expected to participate in researching and gathering occupational information. The scope of the labor market research required will be dependent on the client's occupational goal and discussion with the Service Canada VRCM.

In addition to providing labour market information on the client's occupational goal(s) available from federal and provincial other government sources, the service provider must contact a minimum of three companies in the region where the client will be conducting a job search. The service provider is also expected to encourage and guide the CPP Disability client to conduct a minimum of five informational

interviews with similar employers or what is deemed appropriate as per local labour market. This information will then be reflected in a progress report.

Before including a particular program in the report, it needs to be discussed with the Service Canada VRCM to determine if it is realistic based on the overall cost and duration. Exploration of alternate programs may need to be suggested should the proposed program not meet CPPD Vocational Rehabilitation's program objectives.

Deliverables:

- a minimum of one progress report including occupational labour market information and analysis;
- interest and/or aptitude test reports if required; and
- correspondence and documentation obtained and/or generated during the assessment process.

Outcomes:

- Occupational goal established
- Further specialized assessment required
- Decision not to proceed with rehabilitation program

Note: The service provider will perform no further work or incur further costs until authorized to do so by the Service Canada VRCM.

6.1.3 SPECIALIZED ASSESSMENTS:

Specialized assessments will only be supported by the Service Canada VRCM when:

- More specific information is needed to further determine a client's rehabilitation potential and/or suitability to continue in the CPPD Vocational Rehabilitation Program.

Due to the specific nature of each assessment/evaluation, duplication of a particular assessment/evaluation will not be approved by the Service Canada VRCM.

Specialized assessments may include but are not limited to:

- Neuropsychological assessments
- Intelligence testing
- Achievement testing
- Work site analysis/Job demand analysis/Physical demands analysis
- Functional capacity evaluation / functional abilities evaluation (NOTE: a signed agreement must be obtained from the client's physician prior to organizing or doing a FCE/FAE)
- Ergonomic assessment
- Psycho-vocational/psycho-educational assessment
- Formal Transferable Skills Assessment
- Job modifications

Deliverables:

- Specialized assessment report(s), which includes interpretation of results
- Correspondence and documentation obtained and/or generated during the assessment process
- When required, a signed agreement for a FCE/FAE by the client's physician

Outcome:

- Decision to proceed with rehabilitation program, indicating any risk and mitigating factors

- Decision not to proceed with rehabilitation program

Note: The service provider will perform no further work or incur further costs until authorized to do so by the Service Canada VRCM.

6.2 PLANNING PHASE:

6.2.1 DEVELOPMENT OF AN INDIVIDUAL WRITTEN REHABILITATION PLAN (IWRP):

The service provider will develop an IWRP after the completion of the assessment phase.

An IWRP must be approved by the Service Canada VRCM for each case prior to the implementation of any intervention, with the understanding that the plan should be re-evaluated and readjusted as necessary.

The IWRP must:

- be developed in collaboration with all key stakeholders: client, Service Canada VRCM, service provider, physician and co-insurer or other partnering agency (as applicable);
- first be approved by the Service Canada VRCM before obtaining signatures of the stakeholders;
- be realistic and specific, including estimated costs and clear time frames;
- identify the total projected cost for each activity, with start dates and expected duration;
- not jeopardize the physical and mental health of the client;
- have attainable short and long term goals;
- identify barriers/problems to be addressed;
- identify strategies and services needed to reach the goals;
- identify the responsibilities of the client, Service Canada VRCM and the service provider;
- itemize co-insurer/other partnering agency participation; and
- include service provider estimated hours of work for those activities paid on an hourly basis.

The format of the IWRP is to include the interventions and the associated costs.

Deliverables:

- IWRP signed by key stakeholders
- Documentation and correspondence obtained and/or generated during this stage
- Signed cost sharing agreement with co-insurer/partnership agency if appropriate.

6.2.2 REVISED DEVELOPMENT OF AN INDIVIDUAL WRITTEN REHABILITATION PLAN:

A revised IWRP must be submitted by the service provider when a significant change to the original plan is recommended, such as a marked change in occupational direction, training and/or cost. Before initiating a revised IWRP, contact the Service Canada VRCM to discuss whether a revised version is required. It is at the discretion of the Service Canada VRCM as to whether a revised IWRP is necessary.

Similarly if there is a significant change in the client's health status, unless otherwise directed by the Service Canada VRCM, the service provider must obtain an updated written medical consent from the physician in order to continue to provide vocational rehabilitation services.

The content and focus of a revised IWRP shall be the same as noted in 6.2.1.

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-
- Revised IWRP
 - Documentation and correspondence obtained and/or generated during this stage
 - Physician consent (if applicable)

6.3 INTERVENTION PHASE:

The intervention phase involves the implementation of the IWRP with necessary on-going readjustments. For the purpose of this statement of work, the intervention phase is categorized into three types of activities to be offered:

- Ø Client development and skills training activity (job readiness);
- Ø Job search activity; and
- Ø Follow-up and on-the-job evaluation activity.

It is understood that during the intervention phase, case management and service coordination are an inherent part of the three categories of services to be provided by the service provider.

Case management and service coordination will include:

- o reinforcement of realistic vocational goals;
- o promotion of client responsibility in his/her vocational rehabilitation program;
- o monitoring progress and maintaining communication with client;
- o identification and utilization of resources; and other funding options available to the client;
- o coordination of services with co-insurers or other agency partners;
- o coordination of information gathering;
- o coordination of medical management, which includes obtaining medical releases as required;
- o coordination of crisis assistance and support;
- o coordination and documentation of the overall service delivery plan; and
- o provision of support to the client.

6.3.1 CLIENT DEVELOPMENT AND SKILLS TRAINING ACTIVITY (JOB READINESS):

These activities will assist the client in developing, or re-establishing skills, attitudes, personal characteristics, work behaviors, functional capacity and other factors that impact on employability. Positive employment outcomes will bring them to a job ready level.

In addition to case management and service coordination, the activities provided or coordinated by the service provider may include any of the following:

- o On-the-job training
- o Short-term upgrading
- o Occupational skills training
- o Provide recommendation for assistive devices
- o Tutorial services
- o Unpaid work experience *
- o Work hardening
- o Job Coaching

*Note: CPPD Vocational Rehabilitation clients working with service providers may not be involved in unpaid or voluntary work as part of their program unless the service provider or the employer has appropriate Workers Compensation or equivalent coverage. Proof of this coverage must be provided to the Service Canada VRCM in advance of any unpaid or voluntary work placement.

The items listed below will only be considered for funding with a **very strong rationale** and approval by the Service Canada VRCM:

- Psychotherapy;

- acute/curative medical care such as physiotherapy, chiropractic medicine, pain management programs;
- alternative medicine such as acupuncture, massage, etc.;
- inpatient therapy program;
- excessive training costs over \$10,000;
- equipment/supplies not essential for training or to improve function;
- equipment with a high market value where a client could profit from its sale;
- child care expenses (except in certain cases of financial hardship negatively affecting participation in the program); and
- partial contribution toward relocation expenses.

The Service Canada VRCM or service provider may facilitate the arrangement and/or provision of certain of the foregoing services where appropriate, including where coverage might be available through an alternate funding source.

Deliverables:

- Progress Report (requirements described in section 9.4
- Closure Report if program is discontinued at this stage (requirements described in section 9.4
- Documentation, correspondence generated and/or obtained during this phase of intervention including course marks received at the end of the school term

Outcome:

The Service Canada VRCM must approve the continuation of the proposed IWRP after each progress report. The frequency of the progress reports should be negotiated with the Service Canada VRCM, in situations where the service provider believes there is not a necessity for a report to be submitted every 6 weeks.

6.3.2 JOB SEARCH ACTIVITY:

Services providers will assist the client in securing any substantially gainful employment that can be sustained.

Once a client has demonstrated the capacity to work, he/she is given a 3 month job search period. The service provider is responsible for identifying/recommending the need for an extension to the job search period on a monthly basis, up to a maximum of 12 months.

*In addition to case management and service coordination, specific activities to be provided by the service provider may include the following:

- Ø Job Search Preparation, which includes the following:
 - o resume and cover letter preparation assistance
 - o job search techniques preparation assistance
 - o interview skills preparation assistance
- Ø Active Job Search Assistance (see description in Glossary of Terms)
- Ø Job Development and Placement (see description in Glossary of Terms)

If a decision is made to have the client attend a job finding club or other community-based search programs, this may replace Job Search Preparation activities. However, if deemed necessary, further job development, placement and active job search assistance beyond the length of the club may be required.

Deliverables:

- Copy of cover letter and resume
- Job Search Agreement (requirements described in section 9.4 and template Addendum)
- Progress Reports during job search
- Closure Report if the program is discontinued at this stage
- Documentation and correspondence generated and/or obtained during this phase of intervention
- Employer Contact Sheet

Outcome:

When a job is not secured at the end of the approved job search period, the Service Canada VRCM will decide whether the case should be closed or if any further follow-up will be required. The service provider will perform no further work or incur further costs until the Service Canada VRCM conveys this decision in writing.

6.3.3 FOLLOW-UP AND ON-THE-JOB EVALUATION ACTIVITY (Work Trial):

This activity will provide:

- frequency of monitoring client job performance during this phase is to be negotiated with the Service Canada VRCM, but should be at least every week for the first month, in-person or by telephone as appropriate
- identify potential problems that may lead to a failed return to work and recommend preventive strategies and/or corrective measures
- Confirming and documenting client's salary and hours per week

Deliverables:

- Return to Work Follow-up Report (see section 9.5 and Appendix H) (must be submitted at the end of the 6th week of the three month work trial period);
- Closure Report
- Documentation and correspondence generated and/or obtained during this phase of intervention

Outcome:

The Service Canada VRCM will make the decision to cease benefits after reviewing the Return to Work Follow-up Report, any documentation demonstrating regained capacity, and may include follow-up discussions with the contracted service provider and the client if deemed necessary.

7. SCOPE:

Services are to be delivered with responsibilities shared between the client, service provider and Service Canada VRCM.

We encourage open communication between all participating parties.

The ability for all parties to carry out the responsibilities outlined below will, in part, determine whether a client is able to continue in the CPPD vocational rehabilitation program. Other considerations are ongoing medical stability of the client and a reasonable plan to attain gainful employment.

**7.1 CLIENT ROLES AND RESPONSIBILITIES
(provided for informational purposes only)**

- to cooperate in the assessment process;

- to accept responsibility for their own vocational plan;
- to assist in the development of a realistic vocational rehabilitation plan and actively; participate in the implementation of that plan;
- to inform the Service Canada VRCM of any vocational services and/or financial; assistance received from other sources to assist with schooling or return to work. E.g. money for tuition/transportation/equipment;
- to participate in researching and providing information about the labor market for possible goals;
- to explore funding options available such as grants, bursaries, scholarships or loans if directed by Service Canada and submit appropriate applications for these;
- to assist, where possible, with appropriate costs or in kind contributions to achieve the individual rehabilitation plan;
- to maintain contact with the service provider;
- to be able to attend regular appointments and be available for follow-up;
- to inform the service provider of any change(s) in their life situation that will affect the progression of the rehabilitation plan, or a change in their medical condition that would lead to a delay in the program. In this latter case, the Service Canada VRCM may request the service provider to obtain a medical update from the client's physician;
- to actively participate in a job search on a "full time basis" and to provide evidence of the search activity; and
- to demonstrate willingness to adapt to a changing job market and personal circumstances and consider alternatives.

7.2 SERVICE PROVIDER RESPONSIBILITIES

- to assess vocational rehabilitation potential and assess risk of failure and mitigating factors on an ongoing basis;
- to make a recommendation on the rehabilitation potential based on a sound business case including estimated cost of the program if potential is identified;
To not act as a client advocate, but rather, to play an objective role throughout the vocational rehabilitation process;
- to implement the vocational rehabilitation plan and recommendations approved by the Service Canada VRCM;
- to ensure that the client's health and well-being are protected at all times;
- to ensure their premises are accessible to CPP Disability clients;
- to ensure quality performance of the service provider's staff (rehabilitation consultants and job developers) and any third party sub-contractors;
- to ensure that quality services are provided to the client and Service Canada;
- to disburse all approved expenses for the client's rehabilitation program and submit invoices with receipts to Service Canada for reimbursement in a timely fashion;
- to explore cost sharing potential with co-insurers;
- to obtain an updated medical report (on an as needed basis);
- to inform Service Canada of any staffing changes that may impact service delivery; and
- to ensure all proposed new staff meet the requirements outlined in Annex B and forward the CV and any copies of supporting documents to Service Canada.

7.3 SERVICE CANADA VRCM RESPONSIBILITIES

- to decide whether to accept the client into the program;
- to ensure a written consent is in place from the client's physician to support his/her participation in the CPP Vocational Rehabilitation Program;
- to decide when the case will be put on hold, closed or ceased;
- to authorize work to be performed, monitor performance of the service provider, and provide funding for approved services;

- to initiate and arrange for cost sharing agreements with co-insurers or other community partners on a case by case basis
- to inform the service provider of any partnership agreements to complete the overall plan and to ensure that confidential information is received;
- to facilitate a decision when a consensus cannot be reached between the client, service provider, Service Canada VRCM and co-insurer/community partners (if applicable);
- to ensure that quality services are provided. When any part of the Statement of Work is not adhered to, Service Canada reserves the right to transfer the case to another service provider.

For cases in progress, the Service Canada VRCM will, as appropriate:

- inform the service provider of any change in Service Canada VRCMs;
- inform the service provider in writing of any changes in policy guidelines that will affect the service provider (travel, rehabilitation policies, work incentives, etc...);
- provide response/feedback to progress reports and approve rehabilitation plans and recommendations in writing when deemed necessary;
- provide guidance and assistance with the development of an Individualized Written Rehabilitation Plan (IWRP);
- provide assistance with problem solving on difficult cases;
- provide service quality feedback on the service provider's performance;
- retain the discretion to use alternate resources to provide rehabilitation services that are specific to the client; and
- provide any results of formal or informal client satisfaction feedback undertaken.

8. REVIEWS AND APPROVALS:

- No activity should be initiated beyond the initial assessment without the authorization from the Service Canada VRCM.

The rehabilitation plan shall not be implemented without the authorization of the Service Canada VRCM and concurrence from the client and treating physician; and

- The Service Canada VRCM is responsible for all decisions regarding the client's vocational rehabilitation program and will decide whether the program should continue or not after the review of each report.

9. CONSTRAINTS:

9.1 USE, RETENTION, DISPOSAL AND SECURITY OF INFORMATION

1. For the purposes of allowing the service provider to perform the work under the contract, Service Canada shall make available to the service provider, in accordance with the section 69 and 70 of the CPP Act and other applicable laws governing the protection of information under its control, the client information (Retirement, Disability, Survivors, and Death benefits) which is stored in HRSDC's Personal Information Bank (PPU 146)

2. For the purpose of performing the work under the contract, the service provider shall collect, on behalf of Service Canada and to the exclusion of all other information, the information listed in sections 6.1; 6.2, 6.3 of the statement of work and any additional information required as discussed with the Service Canada VRCM.

3. Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, the service provider shall not collect, use or disclose the information respectively referred to in sections 1 and 2 except for the purpose of performing the work under the contract.

4. The service provider shall take all necessary measure to ensure that every person it hires, or the services of whom it retains to fulfil its obligations under this contract, knows and complies with all the terms and conditions of this contract with respect to the protection of information referred to in this section.

5. Unless otherwise required by law or authorized in writing by the individuals to whom that information relates, the service provider will ensure that no information referred to in sections 1 and 2 above, is disclosed to a third party for any purpose, unless there is a written agreement between the service provider and the third party, imposing upon the third party obligations that are the same as those that are imposed upon the service provider under this contract with respect to the protection of this information.

6. The information referred to in sections 1 and 2 above remains at all times under the control of Service Canada.

7. The information referred to in sections 1 and 2 above is protected by the Privacy Act and any other applicable federal laws governing the protection of personal information held by federal institutions. That information shall be treated as such by the Contractor in accordance with the CISD security policies specified in the contract, the Government of Canada Security Policy or other instructions that HRSDC or PWGSC may issue.

8. Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, the service provider shall not make any copies of the information referred to in this section except with the written consent of Service Canada.

9.. Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, upon file closure, expiry or termination of the contract, whichever is earlier, the service provider shall (return to Service Canada) all information (paper or electronic) referred to in this section and copies thereof, if any. All paper files are to be sent back to the department following Protected B security (via mail: double enveloped, gum-sealed, with no security marking on the outer envelope). If electronic files exist, they are to be sent back to the department following Protected B security (as indicated above). They are to burn all information onto a CD - one CD per client.

9.2 SERVICE DELIVERY PHILOSOPHY

The Service Canada Service Philosophy described in section 3 must be respected at all times.

9.3 MONITORING

The Service Canada VRCM will determine the frequency of monitoring in consultation with the service provider based on the phase of the rehabilitation plan and the particular need of the client, unless otherwise specified in the contract.

9.4 REPORTS OR DELIVERABLES AS STATED IN EACH PHASE:

Note: Any variations from the deliverable time frames must be discussed with the Service Canada VRCM in advance.

All reports must include required content as listed in the accompanying form template in the appendices. They must be submitted on service provider company letterhead and be signed by a CPP- approved vocational rehabilitation consultant.

Initial Assessment Reports: must be submitted within 30 calendar days of referral and must follow the content identified in 6.1.1 herein. All correspondence and documentation obtained and/or generated for the assessment must be attached to the report. (See suggested content Appendix B)

Vocational Confirmation/Exploration Activity Reports: All correspondence and documentation obtained and/or generated during this phase must be submitted within the time frame approved by the Service Canada VRCM.

Labour Market Analysis (LMA) Report: must be submitted as part of the Vocational Confirmation/Exploration Phase and prior to initiating the IWRP. (See Appendix C: LMA template for required content) A copy of the client's labour market research must be submitted with the Labour Market Analysis Report.

Specialized Assessment Reports: All correspondence, documentation and interpretation, must be submitted two weeks after the completion of the assessment.

Individual Written Rehabilitation Plan (IWRP): a draft IWRP must be submitted within two weeks of the completion of the vocational exploration/confirmation phase and must be approved by the Service Canada VRCM prior to obtaining stake-holder signatures. The IWRP must be signed by all stake-holders prior to the implementation of any intervention. The IWRP must follow the content outlined in section 6.2.1 and the glossary of terms (See Appendix D: IWRP template for suggested content).

Progress Report: must be submitted as negotiated with the Service Canada VRCM, normally only when activity justifies an update, and should follow the content outlined herein. All correspondence and documentation generated and/or obtained during the report period must be attached to the report. In addition to reporting all relevant activities within the period covered, the report should provide a summary of contacts, client observations, emerging barriers, evidence of capacity or incapacity for work, specific recommendations (and justifications for significant changes), outcomes, prognosis for future outcomes and requested actions to the Service Canada VRCM. (See Appendix E: Progress Report template for required content).

During the job search phase, a list of specific employer contacts should be included with the progress report (See Appendix G: Employer Contact Sheet Template for required content)

The Service Canada VRCM may request a status report at any time.

Job Search Agreement: must be submitted to Service Canada before starting each approved job search period. The agreement must be signed by the client and the service provider to confirm that the client is ready for the job search. In consultation with the Service Canada VRCM, the agreement will identify the duration of the job search period and the number of required weekly employer contacts agreed to by the client. (See Appendix F: Job Search Agreement template for required content)

Return to Work Follow-up Report: a minimum of one report must be submitted no later than 2 weeks before the end of the three month work trial period (additional reports may be required by the Service Canada VRCM). Must include details of the job (type/earnings), an evaluation of performance by the supervisor (if appropriate) and client, identification of problems/issues, and recommendations. (See Appendix H: Return to Work Follow-up Report template for required content)

Closure Report: must be submitted within 30 days of termination of vocational rehabilitation services. Content must include an overview of complete IWRP activities and outcomes, evidence of client capacity or incapacity to return to a substantially gainful occupation (SGO) and recommendations if SGO not attainable as well as total invoiced costs. All outstanding invoicing must be submitted with the final report. (See Appendix I: Closure Report template for required content)

All information collected during the performance of the Vocational Rehabilitation process must be returned with the closure report.

Solicitation No. - N° de l'invitation

G1169-110019/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

xaq031

Client Ref. No. - N° de réf. du client

G1169-110019

File No. - N° du dossier

XAQ-1-34335

CCC No./N° CCC - FMS No/ N° VME

10. PERFORMANCE OUTCOMES:

Service Canada will evaluate service provider performance based on client success outcomes and quality of service. Service providers will receive feedback on quality of service from the Service Canada VRCM on an as needed basis. Any issues will be addressed in writing by the Service Canada VRCM immediately and corrective action will be expected by the service provider.

The Contracting Authority shall be notified in writing of any corrective action that is not resolved to the satisfaction of the Service Canada VRCM, or of any issues that the Service Provider cannot resolve with the Service Canada VRCM.

Service Canada reserves the right to transfer clients in programming to another service provider at any time.

Glossary of Terms:

Achievement Testing:

Measures the achievements or proficiencies, which a client has learned in the past, usually in typical areas of schooling, such as language arts, mathematics, and science. Examples of Achievement Tests include the Canadian Adult Achievement Test (CAAT) and the Test of Adult Basic Education (TABE).

Active Job Search Assistance:

Describes all activities involved in active pursuit of substantially gainful employment. Clients will have all necessary preparation activities completed (resume, cover letter, interview practice, how to access the hidden job market), and will be concentrating solely on job hunting. Service providers will support and case manage clients, as well as providing them with potential job leads (when available).

Aptitude Testing:

Measures a number of abilities important for academic or occupational success. The assessment of a client's aptitudes is useful in many different situations, such as the following:

- to identify some of the client's attitudinal strengths and weaknesses as an aid in vocational assessment, job placement, and / or retraining.
- to obtain an objective means to help increase the self-awareness of a client who has an unrealistic view of his / her abilities.
- to identify specific occupational and / or educational options for exploration which reflect a client's attitudinal strengths.
- to evaluate potential success of a client in a particular course of action such as retraining or a new occupation for which a certain level of proficiency in specific aptitudes are necessary.
- to determine if the client needs to develop any aptitudes further, prior to entering retraining or a specific occupation.
- to identify clients which are most likely to succeed in a particular occupation as part of a selection process.

Closed Case:

A case where the Vocational Rehabilitation Program is discontinued and CPPD benefits are continued due to lack of evidence of capacity to work or evidence of incapacity to work.

Ceased Case

A case where the Vocational Rehabilitation Program has been completed and benefits are ceased based on evidence of regained capacity whether or not a job is found.

Ergonomic Assessment

An in-depth study of the workplace and how it relates to the worker performing the job tasks. The assessment considers human factors, task requirements, work station organization, and environmental factors that must be accounted for in order to design a safe and productive work place, and hence match the job tasks to the worker. The assessment will provide recommendations that may assist in achieving the goal of fitting the job tasks to the worker.

Functional Capacity Evaluation (FCE) / Functional Ability Evaluation (FAE)

An intensive short term physical capacity evaluation using a battery of tests focusing on the determination of selected work tolerance areas and functional limitations. It includes a physiotherapy evaluation, including general level of fitness for work, assessment of the workers range of movement, stability, flexibility and strength. Also included is an occupational evaluation (workers ability to carry out the essential elements of the job including stamina and possibly workers overall functional abilities and functional tolerances). As per section 6.1.3: a signed agreement must be obtained from the client's physician prior to organizing or doing a FCE/FAE.

Hierarchy of Return to Work

Research demonstrates that the use of the return-to-work hierarchy minimizes disruption in the clients life and ensures the most cost effective, efficient and permanent re-employment for that individual.

1. Return to work performing same job with same employer.
2. Return to work modified job with former employer.
3. Using transferable skills, return to different job with former employer.
4. Using transferable skills, return to different job with different employer.
5. Return to work following the minimum amount of training that, with the disability, will allow for a return to work with same or new employer.
6. Return to work self-employment .

Intelligence Testing

Intelligence testing usually provides some form of a single global measure of a client's general level of cognitive development, such as an IQ score. Some tests also provide scores on sub-tests of various components of intelligence. The assessment of a client's general level of intelligence is useful in many different situations, such as the following:

- to identify the client's intellectual level as an aid in vocational assessment, job placement, training and / or education.
- to obtain an objective means to help increase the self-awareness of a client who has an unrealistic view of their intelligence.
- to evaluate potential success of a client in a particular course of action such as re-training or a new occupation for which a certain level of intelligence usually is required.
- to identify; clients who are most likely to succeed in a particular occupation or educational opportunity as part of a selection process.

Individualized Written Rehabilitation Plan

It is an organized systematic overall plan for vocational rehabilitation and a vocational rehabilitation quality management tool, which can be used to ensure the client, is receiving quality service. Its purpose is to act as a client centered road-map to prevent miscommunication or confusion regarding the client's vocational needs and the best possible means of meeting those needs in a timely and cost effective manner.

An IWRP should include:

- a long term vocational rehabilitation goal for the client and short term vocational rehabilitation objectives to assist in attaining the occupational goal
- a description of specific interventions to be provided to assist the client in attaining the occupational goal
- the anticipated start date and expected duration of each intervention
- the anticipated cost of each intervention, itemizing disbursement costs and projected hours of consultant time associated, who will pay for the intervention (if their is partnership with co-insurer or another vocational agency, and any other associated costs
- a method of determining whether the goal and objectives are being reached
- an outline of consultant and client responsibilities
- signatures of the client, service provider, Service Canada VRCM, treating physician, co-insurer/partnering agency (if applicable)

Job Coaching

Individualized mentoring, training and evaluation on the job, by a qualified job coach. The job coach will work along side the client in their work placement to assist them in learning how to succeed on the job and how to resolve issues and barriers as they arise. This assistance will be for a specific period of time to help the client adjust to their work environment.

Job Development and Placement

The process of locating and supporting a specific permanent job placement on behalf of the client, by working with various community resources on behalf of clients who require in-depth assistance. This does not include the aid of a job coach, but rather activities done by the consultant. The permanent employment pursued will not include sheltered work environments; rather it will be in support of substantially gainful employment.

Job Demand Analysis

Is the research and analysis of; the physical requirements of a specific job in all its activities, the skill required to perform each activity of the specific job satisfactorily and the tools, equipment, machines, work aids and materials used to accomplish the job.

Job Modification

Job-site, employer supported accommodations, intended to eliminate potential physical or emotional workplace re-entry barriers, in order to support the client's return to active, substantially gainful employment. This could include the implementation of appropriate assistive devices, job coaching, ergonomic adjustments etc.

Job Search Agreement

The job search agreement identifies the duration of the client's job search period, a description of the required job search activities including the client independently accessing Job Finding Clubs and other community resources, the number of required weekly employer contacts agreed to by the client and the planned date for ceasing CPP Disability benefits.

Job Search Preparation

Assisting the client to learn how to complete a resume and covering letter as well as learn relevant job search techniques (accessing the hidden job market, interviewing skills etc.). This may be accomplished one on one or in a group setting. Job Finding Clubs are considered in place of this activity and no disbursement will be paid. However as indicated in section 6.3.2, if deemed necessary, further job development, placement and active job search assistance beyond the length of the club may be required.

Labour Market Information/Analysis

Assisting the client in researching and gathering occupational information, economic and social trends, job outlooks and local/regional/national labour market conditions. Information sources include HRSDC/Service Canada and other government agencies, as well as that gathered by direct contact with employers/employer groups in the area where the client's future job search will be conducted. An in-depth analysis of this data will assist the client in making sound occupational choices that are labour market viable.

Neuropsychological Assessment

An evaluation process used by Neuropsychologists to assess the working brain, to determine how well the brain is producing cognition and behaviour. The process involves collecting information from many sources through various methods, and then analyzing and integrating the information to achieve meaningful conclusions to best understand the person's strengths, limitations and rehabilitation needs. The methods of accomplishing Neuropsychological assessments include interview, history taking, reports of the patient and family and friends, observations in the clinical setting, observations in other settings, clinical tasks and standardized testing. The primary goal of the evaluation usually includes description of the client's intellectual, cognitive, sensory and psychomotor skills; description of the client's emotional and behavioural status, and description of family support systems and their value to the client. The information in the report is intended to facilitate a treatment plan.

Psycho-vocational Assessment

To identify suitable occupational options by taking into account the client's aptitudes / learning potential, academic levels, vocational interests, personality characteristics, general psychological functioning, transferable skills and labour market information. This type of an assessment can be used when there is minimal information regarding suitable occupational options or when retraining is considered and there is a question as to whether the client possesses the intellectual potential to succeed in an academic upgrading or training program. This assessment can also comment on the client's general psychological functioning in terms of their ability to function in the workplace, if this issue is a concern. These assessments require a registered psychologist who has a specialty in clinical or rehabilitation psychology.

Occupational Skills Training

Provides specific educational training, addressing the areas of; skills, knowledge and ability required to obtain and maintain employment in a specific occupation.

On The Job Training

The training of an individual in the actual work place where he / she learns the job from a supervisor or trainer employed by the company.

Partnership

To negotiate on behalf of the client and CPP, with co-insurers or other community partners who have been providing service or will provide service to the individual. Examples of negotiated agreements would be; sharing information to avoid duplication of services or a mutually beneficial cost sharing approach that will assist the client return to work. The initiation of this contact will be discussed with the Service Canada VRCM to determine the best approach. Cost sharing will be suggested for client activities which have not yet been performed and information sharing may involve the exchange of information already completed.

Regained Capacity

Evidence which supports that a client has regained the capacity to return to any substantially gainful employment.

Substantially Gainful Occupation (SGO)

The ability to perform employment that is productive and profitable, as measured in part by a dollar amount which is set annually (11,840 for 2012 or \$986.67 monthly), and against which a persons earnings are compared. However, earnings alone do not determine whether the regular capacity to pursue work exists. Elements of functional capacity and productivity must also be assessed.

Short Term Upgrading

The upgrading of necessary academic credits to achieve appropriate grade levels for entry to work or skilled training courses.

Transferable Skills Review

An inventory of any work, knowledge and competencies learned by the client during his / her work life that can be used in other specific jobs. The client's general educational background is also a factor in this review.

A summary of the client's vocationally relevant factors including vocational behaviours, work values, work experience, education and physical capacities.

Tutorial Services

Services provided by a qualified tutor that will assist the client in understanding and achieving academics goals that have been established.

Unpaid Work Experience – see section 6.3.1

A work evaluation experience that takes place in a competitive job or job training setting, and is the most direct method for analyzing all aspects of work behaviour. This is an unpaid job experience. In this type of evaluation, the client is placed in an actual work station on the job and his or her performance is observed by the employer or work supervisor. The work station is an actual job site where individuals participate in a real work environment performing real work duties. The service provider maintains a close relationship with the client and employer. Work stations are generally set up in the business sector and can also be found in rehabilitation facilities. This experience is used to obtain information unavailable through other methods or to verify previously obtained information to determine client's suitability for a specific job.

Vocational Interests

Tests or exercises which by their personality-based content are intended to reveal interests and preferences. Examples of tests are; Canadian Occupational Interest Inventory, Canadian Occupational Preference System and Strong Campbell Interest Inventory.

Work Hardening

A program that is structured according to specific individual requirements and goals using a step by step approach. Work hardening deals with improving productivity, physical tolerances and other behaviours related to the work place.

Work Sample

Refers to the emulation of an actual industrial task, business operation or a component of an occupational area used by an evaluator to determine the individuals work aptitudes and abilities to function within a related vocational area while providing the client with direct feedback relative to his / her performance in these areas. Work samples also refer to a well defined work activity involving tasks, materials, and tools which are identical or similar to those in an actual job or cluster of jobs. It is used to assess an individual's vocational aptitude, worker characteristics and vocational interests. Examples of work samples are; Singer Evaluation System, Wide Range Employability Sample Test and Valpar Component System.

Work Trial

After the client is working at a substantially gainful level, a three month paid work trial will be introduced to allow the client time to adjust and confirm their ability to return to the work-force. The consultant will monitor and conduct follow-up activity to ensure that the client has successfully regained the capacity to work. During this time the client will continue to receive their CPPD benefits as well as their wages from employment or earnings from self-employment. If after three months the client has regained the capacity to work, the clients CPP Disability benefits can be ceased. Refer to sections 6.3.3 and Glossary definition of Substantial Gainful Occupation.

ANNEX B EVALUATION

1. TECHNICAL BID EVALUATION

MANDATORY CRITERIA

Vocational Rehabilitation (VR) Consultants

All staff proposed (except those proposed solely for job development*) by the bidder to conduct all phases of the work under this proposal must meet at least one of the following minimum certification/education requirements in vocational rehabilitation (VR) to be eligible for further evaluation.

University degree or diploma in Social Sciences, Health Sciences, Human Services or Vocational Rehabilitation with a minimum of two years experience in the provision of Vocational Rehabilitation services.

Current registration as a Registered Rehabilitation Professional (RRP) or Canadian Certification in Rehabilitation Counseling (CCRC) will be considered as an asset.

Proposed staff who do not meet this minimum mandatory requirement are not considered eligible for the work and will not be evaluated as part of a bidders proposal. If there is no staff proposed by a bidder that meets the minimum mandatory requirement described above, the bid shall be considered non-compliant, and therefore ineligible for further consideration.

***Job Developers/Job Placement Specialists**

Bidders who propose staff solely for job development/job placement function within our statement of work must have at least one staff person who meets the minimum mandatory requirement outlined for vocational rehabilitation consultant staff noted above. They will be designated as responsible for the work that the job development/placement specialists conduct on behalf of CPPD clients.

Job Development/Job Placement specialists must meet one of the following minimum certification/education requirements:

Registered Community Support Specialist (RCSS)
Diploma or higher in Vocational Rehabilitation (or directly related* field) plus minimum one year recent job development/placement experience with disabled populations and/or multiple barriers
Certificate or higher in Vocational Rehabilitation (or *related field) plus minimum two years recent experience job development/job placement job development/job placement experience for clients with disabilities and/or multiple-barriers.

*e.g.: Community Rehabilitation, Disability Studies, Disability Management, Therapeutic Recreation, Social Work

Proposed staff who do not meet this minimum mandatory requirement are not considered eligible for the work and will not be evaluated as part of a bidders proposal. If there is no staff proposed by a bidder that meets the minimum mandatory requirement described above, the bid shall be considered non-compliant, and therefore ineligible for further consideration.

RATED EVALUATION CRITERIA:

The following criteria will be used in evaluating the technical proposals:

Criteria	Maximum Points
1) Education/training/certification: VR Consultant	20 points
: Job Developer/Job Placement	5 points
2) Related Experience of Proposed: VR Consultant(s)	50 points
: Job Developer/Job Placement	5 points
3) Demonstrated ability to provide immediate and in person services	20 points
4) Demonstrated Network for Specialized Assessments	10 points
5) Case Studies (see Appendix A)	40 points
6) Past performance References	20 points
Total	170 points

In order to be considered for contract award technical proposal must score a minimum of 70% of the maximum points available (ie minimum points required = 119).

Proposals which fail to score the minimum 70% will be declared non-responsive and not considered further.

TECHNICAL PROPOSAL:

1) To address Evaluation Criteria #1 (Education/training/certification) and #2 (Related experience): A resume must be provided for all proposed VR Consultants detailing their education, training, certification and experience relevant to their work. It must be clearly identified which area the VR Consultant is being proposed to work in. For your ease, please complete Appendix M with your bid.

Experience for VR Consultants refers to experience in Vocational Rehabilitation Counseling or job development, assisting disabled adults return to work. Areas of expertise include: assessment, career counseling, job development and job placement skills and the ability to interpret and implement the results of Vocational Rehabilitation tools and tests and specialized rehabilitation assessments.

A resume must be provided for all proposed Job Developers/Job Placement Specialist detailing their education, training, certification and experience relevant to their work. For your ease, please complete Appendix M with your bid.

5 points will be awarded for each area where the bidder proposes a Job Developer/Job Placement Specialist(s) that meets the mandatory minimum requirement outlined previously.

A maximum 5 additional points will be awarded based on the years of experience in job development/job placement. Experience for Job Developers/Job Placement Specialists is specific to job development/job placement services assisting disabled clients to return to work.

3) To address Evaluation Criteria #3 Demonstrated ability to provide immediate and in-person service to clients. It is up to the bidder as to what information to include, and the particular format to be used. The information should however be detailed enough so as to allow a complete evaluation.

4.) To address Evaluation Criteria # 4 For Demonstrated Network for Specialized assessments (6.1.3), provide details on the network of services you have, either within your organization or available through subcontracting, to supply the specialized assessment services detailed in section 6.1.3, e.g.: detail who will perform the Neuropsychological assessments and detail their experience and expertise etc. Provide the qualifications of the assessment providers.

5.) For Case Study - Rating elements will include:

Identification of the scope and the vocational rehabilitation challenges with CPPD clients; the allocation of personnel for the most appropriate use; the methodology, strategy and adherence to CPP Service Philosophy; the utilization of evidence to support recommendation on rehabilitation potential including identification of risk of failure; the utilization of appropriate assessments, tools, and interventions; the utilization of community resources; and the demonstration of innovation and creativity.

Each bidder is required to demonstrate these technical requirements by completing the attached hypothetical cases found in Appendix A. With the information provided, demonstrate how you would effectively case manage these clients.

Summarize each case in a maximum of 4 pages (Arial 12 font). Any information beyond the 4 pages will not be considered. Any presumptions made regarding assessment and test results and outcome are acceptable. Evaluation will be based on sound, comprehensive strategies, approaches and methodologies. You should indicate what documentation would be required, as well as any assessment and test/tool results you deem appropriate for each case

6.) To address Evaluation Criteria # 6 (Past performance References)

References must be from external * organization(s) involved with clients with a long term disability for which your services have been provided. Reference(s) should address performance in terms of the success rate of clients who have returned to work and quality of services provided. It is requested that a maximum of 2 page reference letter be submitted for each reference. Ensure that the reference(s) name, the name of the organization, the contact person, and the phone number are submitted with the letter.

* External means outside of the Offerors organization. The Offerors parent companies, subsidiaries or other affiliates are internal to the Offerors organization. Of note: the offeror is not to solicit references for this bid from Service Canada.

2. FINANCIAL BID EVALUATION

Will be conducted in accordance with Annex C Basis of Payment.

ANNEX C
BASIS OF PAYMENT/FINANCIAL EVALUATION

The Offeror must complete the attached pricing schedule and include it in its financial offer once completed.

The Offeror must include SEPARATE SCHEDULES FOR EACH AREA where they propose to offer Vocational Rehabilitation services.

The Offeror must submit rates for ALL categories of service and ALL periods.

The rates specified in the pricing schedule, when quoted by the Offeror, exclude travel and living expenses.

INITIAL PERIOD A: APRIL 1, 2013 TO MARCH 31, 2016

OPTION PERIOD B: APRIL 1, 2017 TO MARCH 31, 2017

FOR THE PURPOSE OF EVALUATION, ALL RATES ARE EXCLUSIVE OF GST/HST AS APPLICABLE.			
Geographic service Area being bid on: (ie Area 1: Newfoundland and Labrador, Area 2: Nova Scotia and Prince Edward Island, Area 3: New Brunswick (It is expected that the bidder will be able to provide services in both official languages for the province of New Brunswick.))			
Work Location from which services in Geographic AREA will be offered:			
CATEGORY OF SERVICE Identified in Statement of Work	FIRM HOURLY RATE Initial Period (A)	FIRM HOURLY RATE Option Period (B)	AGGREGATE TOTAL (A+B) = C
6.1.1 Initial assessment			
6.1.2 Vocational confirmation			
6.1.3 Specialized Assessments			
6.2.1 Individual Written Rehab Plan (IWRP)			
6.2.2 Revised IWRP			
6.3.1 Client Development and Skills Training			

6.3.2 Job Search activity d) preparation			
6.3.2 Job Search activity e) assistance			
6.3.2 Job Search activity f) placement			
6.3.3 Follow up and on the job evaluation activity			
9.4 Reports d) progress			
9.4 Reports e) return to work			
9.4 Reports f) closure			
Financial services			
AGGREGATE TOTAL (C)			

NOTE: (1) When the contract is for financial services only (ie payment of disbursements or travel) the service provider will issue payment for the amount specified and invoice 0.5 of an hour for issuing the payment.

**FOR THE PURPOSE OF FINANCIAL EVALUATION:
THE AGGREGATE TOTAL (C) WILL BE UTILIZED AS THE DOLLAR VALUE THAT WILL BE USED
IN THE DETERMINATION OF 70% TECHNICAL / 30% PRICE TO DETERMINE OFFEROR
RANKINGS.**

Section 6.1.3 Specialized assessments

For the firm's managing/obtaining of the specialized services (i.e.: psycho-vocational testing)

Specialized assessments identified in section 6.1.3 will be paid for at actual cost incurred without mark up. The bidder should provide hourly rates and/or prices, and any other pricing information for as many of the services as it can.

Specialized assessments (will not be used for evaluation purposes):

Type: _____ Rate: _____

Type: _____ Rate: _____

Type: _____ Rate: _____

2. Travel and Living Expenses

Offerors must identify the work location that services will be provided from for each Area that they are submitting Offers on.

2.1 For Work to be performed at the work location within a Provincial Area (ie 1.2, 2.1) identified in the call-up:

- (a) For services to be provided within the Province of the specified Area: The Contractor will be paid its authorized travel and living expenses, reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the Treasury Board Travel Directive (http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/TBM_113/menu-travel-voyage-eng.asp), and with the other provisions of the directive referring to "travellers", rather than those referring to "employees"; and
- (b) The Contractor will be paid its authorized travel time, reasonably and properly incurred in the performance of the Work, at a rate of 50% of the all inclusive fixed hourly rate, Actual time for travel will be paid in accordance with the following formula:

$$\text{travel time hours} \times \text{all inclusive fixed hourly rate} \times 0.5$$

2.3 Canada will not accept any travel and living expenses incurred by the Contractor as a consequence of any relocation of personnel from outside of the specified Province required to satisfy the terms of this Contract.

2.4 All travel including travel time must have the prior authorization of the Project Authority identified in the call-up.

2.5 The authorized travel and living expenses will be paid upon submission of an itemized statement supported by receipt vouchers. All payments are subject to government audit.

ESTIMATED HOURS:

THE FOLLOWING ESTIMATES ARE PROVIDED FOR INFORMATION PURPOSE ONLY, AND IS AN ESTIMATION IN GOOD FAITH OF THE AGGREGATE AMOUNT OF SERVICES REQUIRED FOR ALL GEOGRAPHIC SERVICE AREAS IN TOTAL (NOT FOR EACH AREA), FOR THE ENTIRE PERIOD OF THE STANDING OFFER INCLUDING OPTIONS.

CATEGORY OF SERVICE Identified in the Statement of Work	ESTIMATED NUMBER OF HOURS
6.1.1 Initial assessment	2700
6.1.2 Vocational confirmation	3700
6.1.3 Specialized assessments	30

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6.2.1 Individual Written Rehab Plan (IWRP)	1025
6.2.2 Revised IWRP	100
6.3.1 Client Development and Skills Training	3600
6.3.2 Job Search activity d) preparation	1650
6.3.2 Job Search activity e) assistance	4400
6.3.2 Job Search activity f) placement	1200
6.3.3 Follow up and on the job evaluation activity	1300
9.4 Reports d) progress	2900
9.4 Reports e) return to work	325
9.4 Reports f) closure	575
Financial services	100

ANNEX D CERTIFICATIONS

1. Mandatory Certifications Required Precedent to Issuance of a Standing Offer

1.1 Code of Conduct and Certifications - Related documentation

- 1.1.1** By submitting an offer, the Offeror certifies, for himself and his affiliates, to be in compliance with the Code of Conduct and Certifications clause of the Standard instructions. The related documentation hereinafter mentioned will help Canada in confirming that the certifications are true. By submitting an offer, the Offeror certifies that it is aware, and that its affiliates are aware, that Canada may request additional information, certifications, consent forms and other evidentiary elements proving identity or eligibility. Canada may also verify the information provided by the Offeror, including the information relating to the acts or convictions specified herein, through independent research, use of any government resources or by contacting third parties. Canada will declare non-responsive any offer in respect of which the information requested is missing or inaccurate, or in respect of which the information contained in the certifications is found to be untrue, in any respect, by Canada. The Offeror and any of the Offerors affiliates, will also be required to remain free and clear of any acts or convictions specified herein during the entire period of the Standing Offer and any call-ups made against the Standing Offer.

Offerors who are incorporated, including those submitting offers as a joint venture, must provide with their offer or promptly thereafter a complete list of names of all individuals who are currently directors of the Offeror. Offerors submitting offers as sole proprietorship, including those submitting offers as a joint venture, must provide the name of the owner with their offer or promptly thereafter. Offerors submitting offers as societies, firms, partnerships or associations of persons do not need to provide lists of names. If the required names have not been received by the time the evaluation of offers is completed, Canada will inform the Offeror of a time frame within which to provide the information. Failure to comply will render the offer non-responsive. Providing the required names is a mandatory requirement for issuance of a standing offer and award of a contract.

Canada may, at any time, request that an Offeror provide properly completed and Signed Consent Forms (Consent to a Criminal Record Verification form- PWGSC-TPSGC 229) (<http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/formulaires-forms-eng.html>) for any or all individuals aforementioned within the time specified. Failure to provide such Consent Forms within the time period provided will result in the offer being declared non-responsive.

2. Certifications Precedent to Issuance of a Standing Offer and Certifications Required with the Offer

Offerors must submit the certifications as provided below:

2.1 Certifications Precedent to Issuance of Standing Offer

The certifications listed below should be completed and submitted with the offer but may be submitted afterwards. If any of these required certifications is not completed and submitted as requested, the Standing Offer Authority will so inform the Offeror and provide the Offeror with a time frame within which to meet the requirement. Failure to comply with the request of the Standing Offer Authority and meet the requirements within that time period will render the offer non-responsive.

1.1.1 Federal Contractors Program - Certification

1. The Federal Contractors Program (FCP) requires that some suppliers, including a supplier who is a member of a joint venture, bidding for federal government contracts, valued at \$200,000 or more (including all applicable taxes), make a formal commitment to implement employment equity. This is a condition precedent to the issuance of a standing offer. If the Offeror, or, if the Offeror is a joint venture and if any member of the joint venture, is subject to the FCP, evidence of its commitment must be provided before the issuance of a standing offer.

Suppliers who have been declared ineligible contractors by Human Resources and Skills Development Canada (HRSDC) are no longer eligible to receive government contracts over the threshold for solicitation of bids as set out in the Government Contracts Regulations. Suppliers may be declared ineligible contractors either as a result of a finding of non-compliance by HRSDC, or following their voluntary withdrawal from the FCP for a reason other than the reduction of their workforce to less than 100 employees. Any offers from ineligible contractors, including an offer from a joint venture that has a member who is an ineligible contractor, will be declared non-responsive.

2. If the Offeror does not fall within the exceptions enumerated in 3.(a) or (b) below, or does not have a valid certificate number confirming its adherence to the FCP, the Offeror must fax (819-953-8768) a copy of the signed form LAB 1168, Certificate of Commitment to Implement Employment Equity, to the Labour Branch of HRSDC.

3. The Offeror, or, if the Offeror is a joint venture the member of the joint venture, certifies its status with the FCP, as follows:

The Offeror or the member of the joint venture

(a) () is not subject to the FCP, having a workforce of less than 100 full-time or part-time permanent employees, and/or temporary employees having worked 12 weeks or more in Canada;

(b) () is not subject to the FCP, being a regulated employer under the Employment Equity Act, S.C. 1995, c. 44;

(c) () is subject to the requirements of the FCP, having a workforce of 100 or more full-time or part-time permanent employees, and/or temporary employees having worked 12 weeks or more in Canada, but has not previously obtained a certificate number from HRSDC (having not bid on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is attached;

(d) () is subject to FCP, and has a valid certificate number as follows: _____
(e.g. has not been declared an ineligible contractor by HRSDC).

Further information on the FCP is available on the HRSDC Web site.

2.1.2 Former Public Servant Certification

Contracts with 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 with FPS, offerors must provide the information required below.

Definitions

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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, in the context of the fee abatement formula, 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

Is the Offeror a FPS in receipt of a pension as defined above?

YES () NO ()

If so, the Offeror must provide the following information:

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

Work Force Reduction Program

Is the Offeror a FPS who received a lump sum payment pursuant to the terms of a work force reduction program?

YES () NO ()

If so, the Offeror 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 reduction program.

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including the Goods and Services Tax or Harmonized Sales Tax.

2.1.3 Status and Availability of Resources

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The Offeror certifies that, should it be issued a standing offer as a result of the Request for Standing Offer, every individual proposed in its offer will be available to perform the Work resulting from a call-up

against the Standing Offer as required by Canada's representatives and at the time specified in a call-up or agreed to with Canada's representatives. If for reasons beyond its control, the Offeror is unable to provide the services of an individual named in its offer, the Offeror may propose a substitute with similar qualifications and experience. The Offeror must advise the Standing Offer Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Offeror: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

If the Offeror has proposed any individual who is not an employee of the Offeror, the Offeror certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Offeror must, upon request from the Standing Offer Authority, provide a written confirmation, signed by the individual, of the permission given to the Offeror and of his/her availability.

2.2 Certifications Required with the Offer

Offerors must submit the following duly completed certifications with their offer.

2.2.1 Canadian Content Certification

This procurement is limited to Canadian services.

The Offeror certifies that:

() the services offered are Canadian services as defined in paragraph 2 of clause A3050T.

2.2.2 Canadian Content Definition

A3050T (2010-01-11) Canadian Content Definition

Certification

By submitting an offer, the Offeror certifies that the information submitted by the Offeror in response to the above requirements is accurate and complete.

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ANNEX "E" SECURITY REQUIREMENTS CHECK LIST

ATTACHED

ANNEX "F" INSURANCE REQUIREMENTS

1. COMMERCIAL GENERAL LIABILITY INSURANCE

1. The Offeror must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Offer, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.

2. The Commercial General Liability policy must include the following:

(a) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract.

The interest of Canada should read as follows:

Canada, as represented by Public Works and Government Services Canada.

(b) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.

(c) Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.

(d) Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.

(e) Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.

(f) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.

(g) Employees and, if applicable, Volunteers must be included as Additional Insured.

(h) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)

(i) Broad Form Property Damage including Completed Operations:
Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.

(j) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.

(k) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.

(l) Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.

(m) Non-Owned Automobile Liability - Coverage for suits against the Contractor resulting from the use of hired or non-owned vehicles.

(n) Litigation Rights: Pursuant to subsection 5(d) of the Department of Justice Act, S.C. 1993, c. J-2, s.1, if a suit is instituted for or against Canada which the Insurer would, but for this clause, have the right to pursue or defend on behalf of Canada as an Additional Named Insured under the insurance policy, the Insurer must promptly contact the Attorney General of Canada to agree on the legal strategies by sending a letter, by registered mail or by courier, with an acknowledgement of receipt.

For the province of Quebec, send to:

Director Business Law Directorate,
Quebec Regional Office (Ottawa),
Department of Justice,
284 Wellington Street, Room SAT-6042,
Ottawa, Ontario, K1A 0H8

For other provinces and territories, send to:

Senior General Counsel,
Civil Litigation Section,
Department of Justice
234 Wellington Street, East Tower
Ottawa, Ontario K1A 0H8

A copy of the letter must be sent to the Contracting Authority.

Canada reserves the right to co-defend any action brought against Canada. All expenses incurred by Canada to co-defend such actions will be at Canada's expense. If Canada decides to co-defend any action brought against it, and Canada does not agree to a proposed settlement agreed to by the Contractor's insurer and the plaintiff(s) that would result in the settlement or dismissal of the action against Canada, then Canada will be responsible to the Contractor's insurer for any difference between the proposed settlement amount and the amount finally awarded or paid to the plaintiffs (inclusive of costs and interest) on behalf of Canada.

2. ERRORS AND OMISSIONS LIABILITY INSURANCE

1. The Offeror must obtain Errors and Omissions Liability (a.k.a. Professional Liability) insurance, and maintain it in force throughout the duration of the Offer, in an amount usual for a Offer of this nature but for not less than \$1,000,000 per loss and in the annual aggregate, inclusive of defence costs.
2. If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
3. The following endorsement must be included:
Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation.

Annex G

Reporting for Standing Offers and Supplier Arrangements

Contracting officers must ensure that the supplier fulfills all reporting requirements in the standing offer (SO)/supply arrangement (SA), as applicable. Typically, suppliers must report on a quarterly basis on the call-up/contract activities. Such reports may contain, but are not limited to, the following information:

- i. the standing offer/supply arrangement number;
- ii. the supplier name;
- iii. the reporting period;
- iv. the call-up/contract number for each call-up/contract, including amendments;
- v. the client department;
- vi. the contracting authority;
- vii. the date of the call-up/contract;
- viii. the call-up/contract period;
- ix. the line items acquired/services provided;
- x. the value of the call-up/contract, Goods or Services Tax/Harmonized Sales Tax included, as applicable.