



RETURN BIDS TO : - RETOURNER LES SOUMISSION À:

Canada Revenue Agency
Agence du revenu du Canada
See herein / Voir dans ce document

Proposal to: Canada Revenue Agency
We hereby offer to sell to Her Majesty the Queen in right of Canada, in accordance with the terms and conditions set out herein, referred to herein and/or attached hereto, the goods and/or services listed herein and on any attached sheets at the price(s) set out therefor.

Proposition à : l'Agence du revenu du Canada
Nous offrons par la présente de vendre à Sa Majesté la Reine du Chef du Canada, en conformité avec les conditions énoncées dans la présente incluses par référence dans la présente et/ou incluses par référence aux annexes jointes à la présente les biens et/ou services énumérés ici sur toute feuille ci-annexée, au(x) prix indiqué(s).

Bidder's Legal Name and Address (ensure the Bidder's complete legal name is properly set out)
Raison sociale et adresse du Soumissionnaire (s'assurer que le nom légal au complet du soumissionnaire est correctement indiqué)

Blank lines for bidder information

Bidder is required to identify below the name and title of the individual authorized to sign on behalf of the Bidder - Soumissionnaire doit identifier ci-bas le nom et le titre de la personne autorisée à signer au nom du soumissionnaire

Name /Nom

Title/Titre

Signature

Date (yyyy-mm-dd)/(aaaa-mm-jj)

()

Telephone No. - No de téléphone

()

Fax No. - No de télécopieur

E-mail address - Adresse de courriel

REQUEST FOR PROPOSAL / DEMANDE DE PROPOSITION

Table with 2 columns: Solicitation No. - No de l'invitation, Date, Solicitation closes - L'invitation prend fin, Time zone - Fuseau horaire, Contracting Authority - Autorité contractante, Telephone No. - No de téléphone, Fax No. - No de télécopieur, Destination - Destination, THIS DOCUMENT CONTAINS A SECURITY REQUIREMENT. / LE PRÉSENT DOCUMENT COMPORTE UNE EXIGENCE EN MATIÈRE DE SÉCURITÉ.



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REQUEST FOR PROPOSAL (RFP)

Title: Ergonomic Services

PART 1 GENERAL INFORMATION

1.1 INTRODUCTION

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

Part 1 General Information: provides a general description of the requirement;

Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the solicitation;

Part 3 Proposal Preparation Instructions: provides bidders with instructions on how to prepare their bid;

Part 4 Evaluation and Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;

Part 5 Certifications: includes the certifications to be provided by bidders

Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by bidders; and

Part 7 Model Contract: includes the clauses and conditions and any annexes that will apply to any resulting contract.

The Attachments include:

Attachment 1: Mandatory Criteria

Attachment 2: Point Rated Criteria

Attachment 3: Financial Proposal

Attachment 4: Certifications required to be submitted at time of bid closing.

Attachment 5: Certifications required to be submitted prior to contract award

The Annexes include:

Annex A: Statement of Work

Annex B: Basis of Payment

Annex C: Security Requirements Check List (SCRL)

Annex D: Insurance Requirements

Annex E: Requirements for a CRA Synergy Solution

Annex F: Proof of Synergy Compliance Testing (PoSC)



1.2 SUMMARY

The Canada Revenue Agency (CRA) requires the services of a single private sector ergonomic services provider to provide ergonomic-related services to CRA employees across Canada.

The anticipated period of the contract will be for two (2) years from date of contract award, plus three (3) option periods of up to twelve (12) months.

ARIBA SUPPLIER NETWORK (ASN) MEMBERSHIP REQUIREMENT

The Canada Revenue Agency's (CRA) e-commerce solution for ordering, receiving and reconciling goods and services is an Ariba tool which has been branded internally as "Synergy". Synergy is being used in this requirement in order to expedite the ordering process under any resulting contract.

The highest-ranked Bidder must become a member of the ASN prior to Contract award, and maintain membership in the ASN throughout the period of any resulting Contract. All costs associated with this membership shall be borne by the Bidder.

1.3 GLOSSARY OF TERMS

TERM	DEFINITION
"Canada", "Crown", "Her Majesty" or "the Government"	Refers to Her Majesty the Queen in right of Canada as represented by the Canada Revenue Agency (CRA).
Contract or This Contract	The Articles of Agreement, the specified general conditions, any supplemental general conditions, annexes and any other document specified or referred to as forming part of the Contract, all as amended by agreement of the Parties from time to time.
CRA	Canada Revenue Agency
Day/Month/Year	For purposes of technical evaluation, one (1) month shall equal a minimum of 16.67 billable days (a day equals 7.5 hours) and one (1) year equals a minimum of 200 billable days. Any additional billable days within the same year will not increase the experience gained for the purposes of evaluation.
DDP	Delivered Duty Paid
EDT	Eastern Daylight Time
Environmentally Preferable	Products and services that have a lesser or reduced effect on human health and the environment when compared with competing products or services that serve the same purpose. The comparison may consider raw material acquisition, production, manufacturing, packaging, distribution, operation, maintenance, disposal and re-use of the product or service
EST	Eastern Standard Time
Green Procurement	The procurement of products or services that have a lesser or reduced effect on human health and the environment when compared with competing products or services that serve the same purpose. The comparison may consider raw material acquisition, production, manufacturing, packaging, distribution, operation, maintenance, disposal and re-use of the product or service. Green procurement means purchasing goods and services that minimize the use of non-renewable natural resources and toxic materials and the emission of wastes and pollutants over the life cycle of a product or service.



TERM	DEFINITION
Green Product	<p>A product that is less harmful to the environment throughout its lifecycle than the next best alternative, having characteristics including, but not limited to the following:</p> <ul style="list-style-type: none"> • Recyclable - local facilities exist that are capable of recycling the product at the end of its useful life; • Biodegradable - will not take a long time to decompose in landfill; • Contains recycled material (post-consumer recycled content preferred); • Minimal packaging (take-back and reuse/recycling by the supplier preferred); • Reusable and/or contains reusable parts; • Contains no or minimal hazardous substances; • Produces fewer and/or less polluting by-products during manufacture, distribution, use and disposal; • Produces the minimal amount of hazardous substances during production; use and disposal; • Makes efficient use of resources - a product that uses energy, fuel or water more efficiently or that uses less paper, ink or other resources; and/or • Durable - has a long economically useful life and/or can be economically repaired or upgraded.
Green Service	A service acquired from a supplier who has a green operational policy and whose internal practices promote sustainability.
Legal Name	means the name of the company, corporation or other entity constituted as a legal person under which this person exercises its rights and performs its obligations.
Operating Name	means the name that is legally protected and used in the course of its business by a company, corporation or other entity legally constituted as a legal person, or by the individual.
Post-Consumer Waste (PCW)	Materials in a recycled product that are derived from businesses or consumers after having served their original intended use, and which have been separated or diverted from solid waste for the purpose of collection, recycling and disposition.
Project	A set of activities required to produce certain defined outputs, or to accomplish specific goals or objectives, within a defined schedule and resource budget. A project exists only for the duration of time required to complete its stated objectives.
Proposal	A solicited submission by one party to supply certain goods or services. The word "proposal" is used interchangeably with "bid"
RFP	Request for Proposal
Solicitation	An act or instance of requesting proposals/bids on specific products and/or services.
SOW	Statement of Work
Sustainable Development	An internationally recognized concept that embodies social, economic and environmental dimensions. It recognizes the fact that a healthy economy contributes to quality of life, which are both critically dependent on the protection of air, land, water and ecosystems that these resources support. The concept is intergenerational, ensuring that the actions of one generation do



TERM	DEFINITION
	not compromise the ability of future generations to have an equal quality of life.
Task Authorization	Also considered an "Order" (see Synergy definitions)
Tendering Authority	Canada Revenue Agency
VOC: Volatile Organic Compounds	A group of common industrial and household chemicals that evaporate or volatilize, when exposed to air. VOCs are used as cleaning and liquefying agents in fuels, degreasers, solvents, polishes, cosmetics, and dry cleaning solutions.

1.4 DEBRIEFINGS

Bidders may request a debriefing on the results of the solicitation process. Bidders should make the request to the Contracting Authority within ten (10) calendar days of receipt of the results of the solicitation process. The debriefing may be in writing, by telephone or in person.



PART 2 BIDDER INSTRUCTIONS

2.1 MANDATORY REQUIREMENTS

Wherever the words “shall”, “must” and “will” appear in this document or any related document forming a part hereof, the item being described is a mandatory requirement.

Failure to comply or demonstrate compliance with a mandatory requirement will render the bid non-responsive and the bid will not be considered further.

2.2 STANDARD INSTRUCTIONS, CLAUSES AND CONDITIONS

All instructions, clauses and conditions identified in the solicitation by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual issued by Public Works and Government Services Canada (PWGSC). The Manual is available on the PWGSC Website: <https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>.

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of this solicitation and accept the clauses and conditions of the resulting contract.

2.2.1 REVISIONS TO STANDARD INSTRUCTIONS 2003

The 2003 (2014-03-01) Standard Instructions - Goods or Services – Competitive Requirements as revised herein, are incorporated by reference into and form part of the solicitation.

Section 01 titled “Integrity Provisions – Bid”, is revised as follows:

Subsection 1 is hereby deleted in its entirety and replaced with:

1. Bidders must respond to bid solicitations in an honest, fair and comprehensive manner, accurately reflect their capacity to satisfy the requirements stipulated in the bid solicitation and resulting contract, submit bids and enter into contracts only if they will fulfill all obligations of the Contract. To ensure fairness, openness and transparency in the procurement process, the following activities are prohibited:
 - a. payment of a contingency fee to a person to whom the [Lobbying Act](#) (1985, c. 44 (4th Supp.)) applies;
 - b. corruption, collusion, bid-rigging or any other anti-competitive activity in the procurement process.

Subsection 4, delete reference to: (Consent to a Criminal Record Verification form - PWGSC-TPSGC 229) and replace with: (Consent to a Criminal Record Verification form).

Section 02 titled “Procurement Business Number”, is hereby deleted in its entirety and replaced with:

Suppliers should obtain a Business Number (BN) before contract award. Suppliers may register for a BN online at <http://www.cra-arc.gc.ca/tx/bsnss/tpcs/bn-ne/menu-eng.html>.

Section 03 titled “Standard Instructions, Clauses and Conditions”, “Pursuant to the [Department of Public Works and Government Services Act](#) (S.C. 1996, c.16),” is hereby deleted.

Section 05 titled “Submission of Bids”, paragraph 2 (d) is deleted in its entirety and replaced with the following: “(d) send its bid only to the Canada Revenue Agency Bid Receiving Unit or to the address specified in the solicitation in Section 2.3.”

Section 05 titled “Submission of Bids” paragraph 4, delete sixty (60) days and replace with one hundred and eighty (180) days.

Section 06, titled “Late Bids”, reference to “PWGSC” is hereby deleted and replaced with CRA.

Section 07 titled “Delayed Bids”, all references to “PWGSC” are hereby deleted and replaced with “CRA”.



Section 08 titled "Transmission by Facsimile", this section is not applicable to this solicitation and is hereby deleted.

Section 11 titled "Rights of Canada", add the following:

- h) accept, or waive, a non material error of form in a Bidder's proposal or, where practical to do so, request a Bidder to correct a non material error of form in the Bidder's proposal provided there is no change in the price quoted;
- i) award more than one contract for the requirement if it is determined that no single proposal satisfies the project objectives; and
- j) retain all proposals submitted in response to this bid solicitation.

Section 12 titled "Rejection of Bid", delete subsections 1(a) and 1(b) in their entirety.

Section 17 titled "Joint Venture" delete in its entirety and replace with the following:

17 Joint Venture

1. Bidders who bid as a contractual joint venture shall clearly indicate in their bid submission (in Attachment 4) that they are bidding as a contractual joint venture and shall provide the following information.
 - a) the name of the contractual joint venture;
 - b) the name of each member of the contractual joint venture;
 - c) the Procurement Business Number of each member of the contractual joint venture;
 - d) a certification signed by each member of the joint venture representing and warranting:
 - (i) the name of the joint venture (if applicable);
 - (ii) the members of the joint venture;
 - (iii) the Business Numbers (BN) of each member of the joint venture;
 - (iv) the effective date of formation of the joint venture;
 - (v) that the joint venture continues to be in effect as of the date of the bid submission; and
 - (vi) that each member of the joint venture has appointed and granted full authority to the specified member of the joint venture (the "Lead Member") to act on behalf of all members as its representative for the purposes of executing documentation relating to the Contract issued subsequent to contract award (if the joint venture is awarded a contract), including but not limited to Contract Amendments and Task Authorizations.
 - e) the name of the representative of the joint venture (the "Lead Member"), i.e. the member chosen by the other members to act on their behalf.
2. Notwithstanding that the joint venture members have appointed one of the members of the joint venture to act as the representative of the joint venture, the bid including any certifications to be submitted as part of the bid, as well as any resulting contract must be signed by all the members of the joint venture.
3. If a contract is awarded to a joint venture, all members of the joint venture will be jointly and severally or solidarily liable for the performance of any resulting contract.
4. In the case of a contractual joint venture, no dispute, claim or action for damages, whether based in contract, or in tort, or any other theory of law, howsoever arising from the Request for Proposal, Contract, or any other related or subsequently issued documents including without limitation Task Authorizations, Contract amendments may be commenced, or brought against the CRA, including without limitation any of its officers, employees or agents unless each member of the joint venture is a party to such dispute, claim, or action (as the case may be).
5. The Bidder shall obtain the prior written approval of the Contracting Authority to any change in the membership of a contractual joint venture after bid submission. Any change in the membership of a



contractual joint venture after bid submission without the prior written approval of the Contracting Authority shall result in elimination of the bid or if such change occurs after contract award shall be deemed to be default under the Contract.

Section 20 titled "Further Information", Paragraph 2 is hereby deleted and replaced with the following: Enquiries concerning receipt of bids may be addressed to the Contracting Authority identified in the bid solicitation.

2.3 SUBMISSION OF PROPOSALS

When responding, the proposal SHALL be delivered to the Bid Receiving Unit address indicated below by the time and date indicated on Page 1.

BIDDERS ARE TO SUBMIT PROPOSALS TO:

Canada Revenue Agency
Bid Receiving Unit
Ottawa Technology Centre
Receiving Dock
875 Heron Road, Room D-95
Ottawa, ON K1A 1A2

Telephone No: (613) 941-1618

Bidders are hereby advised that the Bid Receiving Unit of CRA is open Monday to Friday inclusive, between the hours of 0730 and 1530, excluding Statutory Holidays.

ELECTRONIC BIDS WILL NOT BE ACCEPTED. Due to the nature of this solicitation, electronic transmissions of a proposal by such means as electronic mail or facsimile is not considered to be practical and therefore will not be accepted.

2.4 COMMUNICATIONS - SOLICITATION PERIOD

To ensure the integrity of the competitive bid process, enquiries and other communications regarding the solicitation must be directed only to the Contracting Authority identified in the solicitation. Failure to comply with the request may result in the bid being declared non-responsive.

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

All enquiries regarding the RFP must be submitted in writing to the Contracting Authority named below as early as possible within the solicitation period to allow sufficient time to provide a response. The following schedule applies to this RFP:

RFP 1000320941 released:	<i>December 17, 2014</i>
First deadline for questions on RFP: (at Noon EST)	<i>January 5, 2015</i>
RFP Amendment (Q&A) released (estimated)	<i>January 7, 2015</i>
Second deadline for questions on RFP: (at Noon EST)	<i>January 14, 2015</i>
RFP Amendment (Q&A) released (estimated)	<i>January 16, 2015</i>
RFP closing date:	<i>January 26, 2015</i>



To ensure consistency and quality of information provided to suppliers, the Contracting Authority will simultaneously distribute any information with respect to significant inquiries received and the replies to such inquiries, without revealing the sources of the inquiries, by way of a formal RFP Amendment.

Meetings will not be held with individual Bidders prior to the closing date and time of this RFP.

2.5 CONTRACTING AUTHORITY

The Contracting Authority is:

Name: Henrique Carrera
Telephone Number: (613)946-8178
Fax Number: (613) 948-2459
E-mail address: Henrique.Carrera@cra-arc.gc.ca

2.6 AMENDMENTS TO BIDDER'S PROPOSAL

Notwithstanding the Rights of Canada, amendments to the Bidder's proposal will not be accepted after the RFP closing date and time.

2.7 APPLICABLE LAWS

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

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



PART 3 PROPOSAL PREPARATION INSTRUCTIONS

CRA requests that bidders provide their bid in separately bound sections as follows:

Section I Technical Proposal

The technical proposal should demonstrate the Bidder’s understanding of the requirements of the Statement of Work and explain how they will meet the mandatory and point-rated criteria detailed in Attachments 1 and 2 respectively. Bidders should demonstrate their capability for providing Ergonomic services in a thorough, concise and clear manner for carrying out the work.

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

The Bidder must complete and sign the front page (page 1) of the RFP and return it with their submitted proposal. The Bidder’s complete legal name must be properly set out on the front page.

Section II Financial Proposal

The Bidder shall provide prices for the services requested in the Statement of Work, using the format outlined in Attachment 3: Financial Proposal. The total amount of Applicable Taxes must be shown separately, if applicable.

Prices must appear in the financial proposal only. Pricing information must not be indicated in any other section of the proposal.

Exchange Rate Fluctuation Risk Mitigation

The requirement does not provide for exchange rate fluctuation protection. Any request for exchange rate fluctuation protection will not be considered.

Section III Certifications

Please refer to Part 5 “Certifications” of this document for more details on the certifications that are required for this solicitation.

3.1 NUMBER OF COPIES

The Bidder is requested to submit the following number of printed and soft copies of the separately bound sections as follows:

SECTION	MASTER (HARD COPY)	NUMBER OF PRINTED COPIES	NUMBER OF SOFT COPIES CD-ROM, DVD or USB Stick
Technical Proposal	1	1	1
Financial Proposal	1	0	1
Certifications	1	0	1
Supporting Information	1	0	1

The soft copies must be provided in a format that is compatible with:

- Microsoft Office 2010
- Supporting information and certifications can be provided in Adobe PDF format.

The master copy (one original hard copy) must be clearly labelled and contain original signatures. If there is a discrepancy between the wording of the soft copy and the printed copy, the wording of the master copy will have priority over the wording of the soft copy.

The financial proposal must be provided on a separate CD-ROM, DVD or USB stick.



3.2 BID FORMAT

CRA requests that the Bidder follow the format instructions described below in the preparation of their bid:

- Use recycled-fibre content paper and two-sided printing. Reduction in the size of documents will contribute to CRA's sustainable development initiatives and reduce waste;
- Use 8.5 inch x 11 inch (or equivalent metric dimensions) bond paper and avoid the use of colour and glossy formats
- Use a numbering system corresponding to that of the RFP and Statement of Work. All references to descriptive material, technical manuals and brochures should be included in the bidder's proposal.

Sustainable Development

CRA Materiel Management policy requires that contracting be conducted in a manner that will ensure the pre-eminence of operational requirements and comply with international trade agreements. It also requires that contracting support national CRA objectives, such as protection of the environment.

In support of the CRA Sustainable Development (SD) Strategy, the Agency is committed to:

- Carrying out its mandate in a manner consistent with the principles of sustainable development (SD) and to promote SD opportunities and obligations with respect to economic growth, social well-being, and a healthy environment. Opportunities and cooperative efforts related to SD will be supported and encouraged throughout the contract period; and
- The purchase of green products and services that are of equal or better performance and quality where available and cost effective.

It is the policy of the CRA to:

- Demonstrate leadership and commitment to SD; and raise the level of management and employee involvement and support for SD;
- Communicate our SD commitment and be accountable to the public;
- Assess the economic, social, and environmental effects of our programs, policies and plans leading to integrated and informed decision-making; and leverage sustainable development to enable efficient and innovative program delivery;
- Monitor, measure, and report on our SD progress;
- Enhance partnerships with clients and partners to support shared responsibility and cooperation for SD objectives; and
- Reduce waste, ensure efficient use of resources, and comply with environmental legislation resulting in environmental stewardship.

Contractors are encouraged to identify the way that their products and/or services benefit the environment and align with the CRA Sustainable Development Strategy which can be found at <http://www.cra-arc.gc.ca/qncy/sstnbl/menu-eng.html>

3.3 PRIORITY OF DOCUMENTS FOR REQUEST FOR PROPOSAL

The documents listed below form part of and are incorporated into this Request for Proposal.

If there is any conflict or inconsistency between the wording of any documents that appear on the list, the wording of the document that first appears on the list shall take precedence over the wording of any document that subsequently appears on the list.

- a) This Request for Proposal and Attachments 1-5, and any amendments; excluding Part 7 Model Contract and Annexes A to F;



- b) Standard Instructions 2003, (2014-03-01) Goods or Services – Competitive Requirements as amended in section 2.2 of this RFP;
- c) Part 7 – Model Contract;
- d) General Conditions 2035, Higher Complexity - Services (2014-03-01) as amended in the Model Contract in Section 7 of the RFP;
- e) Annex A – Statement of Work and any attachments;
- f) Annex B – Basis of Payment
- g) Annex C – Security Requirements Check List (SRCL);
- h) Annex D – Insurance Requirements;
- i) Annex E – Requirements for CRA Synergy Solution;
- j) Annex F – Synergy Proof of Compliance Testing (PoSC);

PART 4 EVALUATION AND SELECTION

4.1 GENERAL

A committee composed of representatives of CRA will evaluate the proposals on behalf of the Agency. The services of independent consultants may be called upon to assist in the evaluation of, or in the validation of, specific aspects of the solution proposed. CRA reserves the right to engage any independent consultant, or use any Government resources, which it deems necessary to evaluate any proposal.

Proposals will be evaluated in accordance with the evaluation criteria identified in Attachments 1 and 2 and in conjunction with the Statement of Work (SOW). Bidders are encouraged to address these criteria in sufficient depth in their proposals to permit a full evaluation of their proposals. The onus is on the Bidder to demonstrate that it meets the requirements specified in the solicitation.

Bidders are advised that only listing experience without providing any supporting information to describe where and how such experience was obtained will not be considered to be demonstrated for the purpose of the evaluation. The Bidder should not assume that the evaluation team is necessarily cognizant of or knowledgeable about the experience and capabilities of the Bidder or any of the proposed resource(s); as such, any relevant experience must be demonstrated in the Bidders' written proposal.

Canada will evaluate the bid only on the documentation provided as part of the bid. References in a bid to additional information not submitted with the bid, such as website addresses where additional information can be found or technical manuals or brochures not submitted with the bid will not be considered in the evaluation of the bid.

Historical Data

All data regarding prior usage, by CRA of any of the required Ergonomic Services, including the data set out herein, is provided to respondents purely for information purposes, and to assist them in preparing their bids. This represents the best information currently available to CRA however, CRA does not warrant or represent that this data is complete or free from errors. Additionally, the inclusion of this data in this solicitation does not represent a commitment that CRA's future purchases of Ergonomic Services will be consistent with this data. It is provided purely for informational purposes.



Historical Data of Ergonomic Services

Types of Service	Fiscal Years	Atlantic	Quebec	HQ	Ontario	Prairie	Pacific	Total
Ergonomic Assessments	2011-2012	80	58	338	273	105	75	929
	2012-2013	117	81	303	394	113	99	1107
	2013-2104	118	67	285	351	112	118	1051
Total:								3087
Follow-up Ergonomic Assessments	2011-2012	1	0	1	2	0	0	4
	2012-2013	11	3	5	11	3	4	37
	2013-2104	7	4	4	18	3	5	41
Total:								82
Education on the Principles of Office Ergonomics (Ergonomic Coaches)	2011-2012	0	1	0	4	0	2	7
	2012-2013	3	1	2	1	0	1	8
	2013-2104	4	3	4	7	5	2	25
Total:								40
Health, Education, Promotion and Training	2011-2012	0	3	0	0	1	0	4
	2012-2013	3	2	0	1	1	1	8
	2013-2104	0	10	1	0	1	0	12
Total:								24

4.2 STEPS IN THE EVALUATION PROCESS

The selection process to determine the successful Bidder will be carried out as follows:

Notwithstanding Steps 1 and 2 below, in order to expedite the evaluation process, CRA reserves the right to conduct Step 3 - Evaluation of Financial Proposals concurrently with Steps 1 and 2. Should CRA elect to conduct Step 3 prior to the completion of Step 2, the information in the Financial Proposal will not be disclosed to the team evaluating the mandatory and rated sections until the completion of Steps 1 and 2. However, if the Contracting Authority is able to ascertain that a proposal is non-responsive by virtue of incomplete information or an error in the financial proposal, the Contracting Authority will advise the team evaluating the mandatory and rated sections that the proposal is not compliant and should no longer be considered. The concurrent evaluation of the financial proposal does not in any way construe compliance in Steps 1 and 2 despite the statement "All bids meeting the minimum thresholds in Step 2 will proceed to Step 3".

Please note that all numbers and figures used in the Point-Rated and Financial Evaluation will be rounded to two decimal places.

STEP 1 – EVALUATION AGAINST MANDATORY CRITERIA

All bids will be evaluated to determine if the mandatory requirements detailed in Attachment 1 “Mandatory Criteria” have been met. Only those bids meeting ALL mandatory requirements will then be evaluated in accordance with Step 2 below.

STEP 2 – EVALUATION AGAINST POINT-RATED CRITERIA

All bids meeting the criteria from Step 1 will be evaluated and scored, in accordance with the point-rated criteria detailed in Attachment 2 “Point-Rated Criteria”, to determine the Bidder’s Total Technical Merit Score. All bids meeting the minimum thresholds in Step 2 will proceed to Step 3.



STEP 3 – EVALUATION OF FINANCIAL PROPOSALS

Only technically compliant bids meeting all of the requirements detailed in Steps 1 and 2 will be considered at this point.

Prices submitted will be evaluated to determine the bid evaluation price as defined in Attachment 3: “Financial Proposal”. Once the bid evaluation prices are determined under Step 3, the proposals will proceed to Step 4.

Bidders must provide a price, percentage, or weight, as applicable, for each item identified in the format specified in Attachment 3: Financial Proposal. Ranges (e.g., \$10-\$13) are not acceptable.

Should there be an error in the extended pricing of the bid, the unit pricing and rates shall prevail and the extended pricing shall be corrected in the evaluation. Any errors in quantities of the bid shall be changed to reflect the quantities stated in the RFP.

Should the Bidder not provide a price, percentage, or weight (for example: the space is left blank or struck through or the letters N/A or the words “no charge” or “included”) for one or more items in Attachment 3: Financial Proposal the following steps will be taken:

1. The CRA Contracting Authority will notify the Bidder of any omission(s) in its financial proposal and give it the opportunity to withdraw its bid, or agree to the following process:
 - If the Bidder does not wish to withdraw its bid, the CRA will insert a price, a percentage or a weight, of \$0.00, 0.00%, or 0.0000 lbs., as applicable for evaluation purposes, for all cells in which financial information is omitted. The corresponding price, percentage, or weight of \$0.00, 0.00%, or 0.0000 lbs., as applicable would also be reflected in any resulting contract and the Bidder would be obliged to honour those prices for the period of the contract, including any option period, as applicable.
 - The Bidder must advise the Contracting Authority of its decision to withdraw the bid or agree to the process described above in writing, within two **(2) business days** of notification. If the Bidder does not respond within the two (2) business days, CRA will render the bid non-responsive and the bid will receive no further consideration.

STEP 4 – BASIS OF SELECTION

BASIS OF SELECTION – HIGHEST COMBINED RATING OF TECHNICAL MERIT AND PRICE SCORE

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the solicitation; and
 - b. meet all mandatory criteria; and
 - c. obtain the required minimum of **65%** overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 211 points.
2. Bids not meeting (a) or (b) or (c) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 60% for the technical merit and 40% 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 divided by the maximum number of points available multiplied by the ratio of 60%.
5. To establish the pricing score, the overall price score for each responsive bid will be determined as follows: lowest evaluated Bidder’s price divided by each responsive Bidder’s price, multiplied by the ratio of 40%.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.



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

In situations where two or more bidders achieve the same total combined rating of technical merit and price score, the bidder recommended for award of the contract will be the compliant bidder with the lowest priced bid.

Bidder	Technical Points out of 211	Technical Merit Score (X) (60%)	Bid Price	Price Score (Y) (40%)	Total Combined Rating (X+Y)
1	128	$128/211 \times 60 = 36.40$	\$500,000*	$500,000/500,000 \times 40 = 40$	76.40
2	134	$134/211 \times 60 = 38.10$	\$540,000	$500,000/540,000 \times 40 = 37.03$	75.13
3	148	$148/211 \times 60 = 42.08$	\$580,000	$500,000/580,000 \times 40 = 34.48$	76.56
4	163	$163/211 \times 60 = 46.35$	\$650,000	$500,000/650,000 \times 40 = 30.77$	77.12***
5	198	$198/211 \times 60 = 56.30$	\$1,200,000	$500,000/1,200,000 \times 40 = 16.67$	72.97

Lowest priced technically compliant proposal (Bidder 1)

**Highest scoring technically compliant proposal (Bidder 5)

***Winning proposal (Bidder 4)

The Bidder, having passed the requirements for this step, will proceed to Step 5.

STEP 5 – BASIS OF SELECTION – OTHER REQUIREMENTS

PROOF OF SYNERGY COMPLIANCE TESTING (PoSC)

Prior to, and as a condition of contract award, the highest ranked responsive bid will be tested during the Proof of Synergy Compliance Testing (PoSC) test phase of the evaluation as described in Annex F: Proof of Synergy Compliance Testing (PoSC). The CRA reserves the right to test the proposed solution in whole or in part against all of the mandatory requirements found in Annex E: Requirements for a CRA Synergy Solution.

Claims of future compliance with CRA's Synergy requirements in software and/or hardware releases will not be considered during the evaluation of the Bidder's proposal.

The Bidder must become a member of the ASN prior to contract award and maintain a valid membership for the period of any resulting Contract including any exercised option period(s). The Bidder must work directly with Ariba Supplier Technical Support to establish and maintain their ASN relationship for the duration of the PoSC Test and any resulting contract including any option period(s). Any cost associated with the implementation and ongoing adherence to these requirements will be borne by the Bidder.

The CRA Synergy Vendor Enablement Coordinator (SVEC) will document the results of the PoSC test. If at any time during the PoSC test, CRA determines that the Bidder does not meet a mandatory requirement of the PoSC Test, the Bidder's proposal will fail the PoSC test and the proposal will not be given any further consideration. The PoSC process with the Bidder will end and a new PoSC process will begin with the Bidder submitting the next highest-ranked responsive bid.

The Proof of Proposal testing timeline shall not exceed forty (40) working days, unless extended in writing by the Contracting Authority at CRA's sole discretion. If a deficiency is detected during the testing the Bidder will have the opportunity to correct any deficiencies during the PoSC testing,

If the proposed solution fails to meet one of the tested mandatory requirements described in Annex F: Proof of Synergy Compliance Testing (PoSC), at the end of the forty (40) working day test period, the bid will be declared



non-responsive. CRA will invite the Bidder with the next highest ranked responsive bid to participate in the POSC testing phase of the evaluation.

CRA reserves the right to conduct (PoSC) testing after Contract Award at its sole discretion.

STEP 6 –SELECTION

The Bidder with the highest ranked responsive bid and having passed all of the Step 5 requirements as described above will be considered the successful Bidder for this requirement and will be recommended for award of a contract.

STEP 7 – CONDITIONS PRECEDENT TO CONTRACT AWARD

The Bidder recommended for award of a Contract must meet the requirements provided in Attachment 5 “Certifications” and Part 6 “Security, Financial and Other Requirements” of this RFP.

STEP 8 – CONTRACT ENTRY

The Bidder(s) with the highest ranked responsive bid and meeting all the requirements listed above will be recommended for award of a contract.



PART 5 CERTIFICATIONS

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

Canada will declare a bid non-responsive if:

- Certifications are completed incorrectly; or
- Legal name is not provided; or
- Required signatures are missing; or
- Certifications are not submitted as requested.

The certifications provided by bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default in carrying out any of its obligations under the Contract, if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

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

The Bidder must submit the original of the completed **Attachment 4**: "Certifications required to be submitted at time of bid closing" along with its bid, by the bid closing date.

When notified by the Contracting Authority, the Bidder shall submit the original of the completed **Attachment 5**: "Certifications required to be submitted prior to contract award" at the time and date specified by the Contracting Authority. However, at their discretion, Bidders may submit these certifications with their proposal.

The Bidder should contact the Contracting Authority if they require further clarification on any certification.



PART 6 SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 ERGONOMIC PRACTITIONER CREDENTIALS

The Bidder must provide a copy of the applicable credentials (license, certification, years of experience) for each proposed ergonomic practitioner identified in Attachment 2, Table R2.1 within ten (10) working days written request from the Contracting Authority.

6.2 SECURITY REQUIREMENTS

The Bidder must meet the security requirements identified in Annex C: Security Requirements Check List (SRCL) and in Section 7.5 of the Model Contract.

1. Before award of a contract, the following conditions must be met:
 - a) the Bidder must hold a valid Designated Organizational Screening (DOS) granted by the Canadian Industrial Security Directorate (CISD) of Public Works and Government Services Canada as indicated in Part 7- Model Contract.
 - b) the Bidder'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 7 - Model Contract.
 - c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.
2. It is the responsibility of the Bidder, to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful bidder to obtain the required clearance will be at the sole discretion of the Contracting Authority.

INSTRUCTIONS FOR BIDDERS WHO REQUIRE SECURITY CLEARANCES

Bidders that currently do not meet any of the security requirements identified in the solicitation should promptly contact the Contracting Authority for further details on how to initiate a security clearance.

6.3 INSURANCE REQUIREMENTS

The Bidder must provide a letter from an insurance broker or an insurance company licensed to operate in Canada stating that the Bidder, if awarded a contract as a result of the solicitation, can be insured in accordance with the Insurance Requirements specified in Annex D.

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

6.4 LIST OF PROPOSED SUBCONTRACTORS

If the bid includes the use of subcontractors, the Bidder agrees, upon request from the Contracting Authority, to provide a list of all subcontractors including a description of the things to be purchased, a description of the work to be performed and the location of the performance of that work. The list should not include the purchase of off-the-shelf items, software and such standard articles and materials as are ordinarily produced by manufacturers in the normal course of business, or the provision of such incidental services as might ordinarily be subcontracted in performing the Work.



PART 7 MODEL CONTRACT

The following clauses and conditions apply to and form part of any contract resulting from the solicitation.

7.1 AGENCY RESTRUCTURING

In cases where the Contracting Authority's department or agency is being reconfigured, absorbed by another government department or agency, or disbanded entirely, the Commissioner may, by giving notice to the Contractor, designate another Contracting Authority for all or part of the Contract.

7.2 REQUIREMENT

To provide Ergonomic Services in accordance with Annex A Statement of Work (SOW), and Annex E: Requirements for a CRA Synergy Solution attached hereto and forming part of this Contract, and the Contractor's proposal dated (yyyy-mm-dd).

7.3 PERIOD OF CONTRACT

The period of the Contract is from date of Contract award to two (2) years from date of Contract award inclusive.

7.4 OPTIONS

7.4.1 OPTION TO EXTEND THE CONTRACT

The Contractor hereby grants to Canada Revenue Agency an irrevocable option to extend the Contract period for up to three (3) additional periods in one year increments, under the same terms and conditions, and prices/rates detailed in the Basis of Payment herein.

The Contracting Authority may exercise an option at any time before the expiry of the Contract by sending a written notice to the Contractor. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

7.4.2 OPTION TO ADD, REMOVE OR MODIFY SERVICES AND LOCATIONS

Where the need may arise due to a shift in legislation, policy or program requirements, CRA reserves the right to add or remove services and locations from the Contract.

In the event that the CRA requires an additional or modified product or service, or requires delivery to a CRA location not included in the present Contract, the Contractor will be asked to provide a price quote for the additional or modified product or service, or the new CRA location, in priority over any other potential vendor.

The option to add, remove or modify products, services or CRA delivery locations may only be exercised by the Contracting Authority and will be evidenced, for administrative purposes only, through a contract amendment.

The Contracting Authority may exercise this option at any time before the expiry of the Contract by sending a written notice to the Contractor.

7.5 SECURITY REQUIREMENTS

Contractor personnel will be subject to the local CRA office access control procedures during core business hours. The CRA core business hours are between 8:00 a.m. to 5:00 p.m. (local time), Monday-Friday excluding statutory holidays, unless otherwise stated in Annex A: Statement of Work.

7.5.1 Security Requirements – Canadian Contractors

Document Safeguarding and/or Production Capabilities – with Computer Systems

1. The Contractor personnel and/or subcontractor personnel requiring access to Protected information, assets or sensitive work site(s) must each hold a valid Reliability screening, granted by the Security and Internal Affairs Directorate (SIAD) of the Canada Revenue Agency (CRA) or the Canadian Industrial Security Directorate (CISD) of Public Works and Government Services Canada (PWGSC).



2. The Contractor must not remove any Protected information or assets from the identified and approved work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restriction.
3. Processing of material only at the Protected B level is permitted under this contract. The work must be done either on a separate stand-alone computer system at the Contractor's site or on a restricted directory that is only accessible to Contractor personnel who have the need-to-know for the performance of the Contract.
4. Notwithstanding paragraph 1, Subcontracts which contain security requirements are not to be awarded without the prior written permission of CRA.
5. The Contractor must comply with the provisions of the:
 - Security Requirement Check List (SRCL), attached as Annex C of the Contract; and
 - Security Requirements for Protection of Sensitive Information (July 24, 2013) issued by CRA, Security and Internal Affairs Directorate and found at the following link <http://www.cra-arc.gc.ca/gncy/prcrmnt/scrtyrqmnts-eng.html>.

7.5.2 Security Requirements – non-Canadian Contractors

Document Safeguarding and / or Production Capabilities – with Computer Systems

1. The Contractor personnel and/or subcontractor personnel requiring access to Protected information, assets or sensitive work site (s) must each hold a valid Reliability screening, granted by the Security and Internal Affairs Directorate (SIAD) of the Canada Revenue Agency (CRA) or granted/approved by the Canadian Industrial Security Directorate (CISD) of Public Works and Government Services Canada (PWGSC).
2. The Contractor must, at all times during the performance of the Contract, hold an approved facility clearance for Document Safeguarding at the Protected B level issued or granted by CIISD or a letter issued by the SIAD confirming that the facility is approved and meets the CRA security requirements.
3. Subcontracts during the performance of the Contract must include the security requirements for an approved Document Safeguarding at the level of Protected B as issued or granted by CIISD or be a facility approved by the SIAD of the CRA. Before performing any work, the Contractor must ensure that the sub-contractor holds an approved Facility for Document Safeguarding at the Protected B level issued or granted by the CIISD or a letter issued by the SRMIAD confirming that the facility is approved and meets the CRA security requirements.
4. The Contractor must not remove any protected information or assets from the identified and approved work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restriction.
5. Processing of material only at the Protected B level is permitted under this contract. The work must be done either on a separate stand-alone computer system at the Contractor's site or on a restricted directory that is only accessible to Contractor personnel who have the need-to-know for the performance of the Contract.
6. Notwithstanding paragraph 1, Subcontracts which contain security requirements are not to be awarded without the prior written permission of CRA.
7. The Contractor must comply with the provisions of the:



- Security Requirement Check List (SRCL), attached as Annex C of the Contract; and
- Security Requirements for Protection of Sensitive Information (July 24, 2013) issued by CRA, Security and Internal Affairs Directorate and found at the following link <http://www.cra-arc.gc.ca/gncy/prcrmnt/menu-eng.html>

7.6 AUTHORITIES

7.6.1 CONTRACTING AUTHORITY

The Contracting Authority for the Contract is:

Name: Henrique Carrera

Telephone Number: (613) 946-8178

Fax Number: (613) 948-2459

E-mail address: Henrique.carrera@cra-arc.gc.ca

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

7.6.2 PROJECT AUTHORITY

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

All work carried out under this Contract is to be performed to the satisfaction of the Project Authority or a designated representative in accordance with the terms and conditions of this Contract. Should the work or any portions thereof not be satisfactory, the Project Authority reserve the right to reject it, in part or in its entirety, and to require its correction before recommending payment.

The Project Authority will be responsible for:

- arranging for access to Crown facilities and equipment;
- review and inspection of all invoices submitted;
- inspection and acceptance of all work performed as detailed in this contract;
- defining any proposed changes to the scope of work.

To be completed at the time of Contract award.

Name: _____

Address: _____

Telephone Number: _____

Fax Number: _____

E-mail Address: _____

7.6.3 CRA ACQUISITION SERVICE DESK

The CRA Acquisition Service Desk provides national support to CRA Purchasers, the CRA Contracting Authority and the Contractor.

To be completed at the time of Contract award.



Telephone Number: _____

Fax Number: _____

E-mail Address: _____

7.6.4 CONTRACTOR’S SYNERGY REPRESENTATIVE

To be completed at the time of Contract award

Synergy Contact Name: _____

Toll Free Telephone Number: _____

Fax Number: _____

E-mail Address: _____

Contractor’s representative for Synergy related questions.

7.6.5 CONTRACTOR’S REPRESENTATIVE

To be completed at the time of Contract award.

Name: _____

Address: _____

Telephone Number: _____

Fax Number: _____

E-mail Address: _____

Contractor’s representative for the contract.

7.7 CONTRACT FOR WORK ON AN “AS AND WHEN REQUESTED” BASIS

- a) Under the terms of the Contract, the Contractor shall provide to the CRA the Work described in the Contract as and when requested by the CRA during the period of the Contract.
- b) The CRA’s obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at the CRA's option, to pay the Contractor in accordance with the following provisions at the end of the Contract. In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract period to perform the work described in the Contract.
- c) The CRA's maximum liability for Work performed under the Contract shall not exceed the Minimum Contract Value, unless an increase is authorized in writing by the CRA.
- d) In the event that the CRA does not request Work in the amount of the Minimum Contract Value during the period of the Contract, the CRA shall pay to the Contractor the difference between the Minimum Contract Value and the cost of the Work requested during the Contract.
- e) The CRA shall have no obligation under this clause in the event that the CRA terminates the Contract in whole or in part for default.
- f) The CRA shall have no obligation under this clause in the event that the Contractor declines to accept work more than three times during the period of the Contract.
- g) "Minimum Contract Value" means **\$120,000.00** for the Contract period, including any option periods.

7.8 STANDARD ACQUISITION CLAUSES AND CONDITIONS (SACC)

All clauses and conditions identified in the Contract by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual issued by Public Works and Government Services Canada



(PWGSC). The Manual is available on the PWGSC Website: <https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>

7.8.1 GENERAL CONDITIONS

2035 (2014-03-01), General Conditions – Higher Complexity - Services, apply to and form part of the Contract.

Section 01 titled "Interpretation" the definition of "Canada", "Crown", "Her Majesty" or "the Government" is hereby amended to read: "Canada", "Crown", "Her Majesty" or "the Government" means Her Majesty the Queen in right of Canada as represented by the Canada Revenue Agency (CRA) ".

Section 02 titled "Standard Clauses and Conditions" is hereby amended to delete the phrase "Pursuant to the Department of Public Works and Government Services Act, S.C. 1996, c. 16,". The remainder of Section 02 remains unchanged.

Section 16 titled "Payment Period" will not apply to payment made by credit cards.

Section 17 titled "Interest on Overdue Accounts" will not apply to payment made by credit cards.

Section 22 titled "Confidentiality",

- Subsection 5 is hereby amended to delete:

Public Works and Government Services (PWGSC) and insert Canada Revenue Agency (CRA).

- Subsection 6 is hereby amended to delete: "PWGSC *Industrial Security Manual* and its supplements", and insert: "Security Requirements for the Protection of Sensitive Information" issued by the CRA, Security and Internal Affairs Directorate (SIAD). The remainder of Section 22 remains unchanged.

Section 41 titled "Integrity Provisions - Contract", subsection 1 is hereby deleted in its entirety and replaced with:

1. The Contractor must also comply with the terms set out in these Integrity Provisions.

7.9 CONTRACTOR IDENTIFICATION PROTOCOL

The Contractor must be responsible for ensuring that each of its employees, officers, directors, agents, and subcontractors (hereinafter referred to as "Contractor Representative") complies with the following self-identification requirements:

1. A Contractor Representative who attends a Government of Canada meeting whether internal or external must identify themselves as being a representative of the Contractor prior to the commencement of the meeting to ensure that each meeting participant is aware of the fact that the individual is not a government employee;
2. During the performance of any Work at a Government of Canada site, each Contractor Representative must be clearly identified at all times as being a Contractor Representative; and
3. If a Contractor Representative requires the use of the Government of Canada's e-mail system in the performance of the Work, then the individual must clearly identify themselves as a non-government employee in all electronic mail in the signature block as well as under "Properties". This identification protocol must also be used in all other correspondence, communication and documentation.

7.10 HANDLING OF PERSONAL INFORMATION

The Contractor acknowledges that Canada is bound by the [Privacy Act](#), R.S., 1985, c. P-21, with respect to the protection of personal information as defined in the Act. The Contractor must keep private and confidential any such personal information collected, created or handled by the Contractor under the Contract, and must not use, copy, disclose, dispose of or destroy such personal information except in accordance with this clause and the delivery provisions of the Contract.



All such personal information is the property of Canada, and the Contractor has no right in or to that information. The Contractor must deliver to Canada all such personal information in whatever form, including all working papers, notes, memoranda, reports, data in machine-readable format or otherwise, and documentation which have been made or obtained in relation to the Contract, upon the completion or termination of the Contract, or at such earlier time as Canada may request. Upon delivery of the personal information to Canada, the Contractor will have no right to retain that information in any form and must ensure that no record of the personal information remains in the Contractor's possession.

7.11 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.
2. The Contractor must ensure that all data relating to the Contract is processed only in Canada.
3. 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.
4. 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.

7.12 ACCESS TO FACILITIES AND EQUIPMENT

Canada's facilities, equipment, documentation and personnel are not automatically at the disposal of the Contractor. If access to government premises, computer systems (micro computer network), working space, telephones, terminals, documentation and personnel for consultation is required by the Contractor to perform the Work, the Contractor must advise the Contracting Authority of the need for such access in a timely fashion. If the Contractor's request for access is approved by Canada and arrangements are made to provide access to the Contractor, the Contractor, its subcontractors, agents and employees must comply with all the conditions applicable at the Work site. The Contractor must further ensure that the facilities and equipment are used solely for the performance of the Contract.

7.13 IDENTIFICATION BADGE

Any person assigned to the performance of any part of the Work that is performed on government premises must wear in a conspicuous place the identification badge issued to that person by Canada.

7.14 SITE REGULATIONS

The Contractor must comply with all rules, instructions and directives in force on the site where the Work is performed.

7.15 WORK LOCATION

Most Ergonomic Assessments will be conducted at CRA facilities, as specified in individual Service Requests; however, there may be teleworking situations when an Ergonomic Assessment will need to be conducted in an employee's residence, other than the locations identified at Annex A: List of CRA Facilities in Canada.

Any Contractor or Contractor resources that are required to work on site during non-business hours under this Contract must obtain pre-authorization in writing by the Project Authority prior to commencing work.

7.16 BASIS OF PAYMENT

The Contractor will be paid firm all-inclusive hourly and unit prices for the services described at Annex A: Statement of Work, in accordance with the schedule of payment provided at Annex B: Basis of Payment.



7.17 LIMITATION OF PRICE

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

7.18 TERMS OF PAYMENT

Payment by CRA to the Contractor for the Work shall be made by:

7.18.1 Single Payment

Canada will pay the Contractor upon completion and delivery of the Work in accordance with the payment provisions of the Contract if:

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

7.19 METHOD OF PAYMENT

At Canada's discretion the Contractor will be paid using either direct deposit, credit card or cheque. All communications regarding the specific method of payment, including changes thereto, will be in writing via email as it's not Canada's desire to formally amend this Contract if the payment method is changed.

At its sole discretion Canada may change the method of payment at any time during the period of the Contract, including any extension thereto, to one of the other two payment methods stated above.

It is the sole responsibility of the Contractor to ensure that their organization is entitled to receive payment from the Government of Canada.

7.19.1 Payment by Direct Deposit

The Contractor shall accept Direct Deposit for payment of the goods and/or services described herein. Payments by direct deposit will be subject to Article 16 – Payment Period and Article 17 - Interest on Overdue Accounts, set out in 2035 General Conditions (2014-03-01) forming part of this Contract.

To complete or amend a direct deposit registration, the Contractor must complete the Vendor Electronic Payment Registration form accessible at: <http://www.cra-arc.gc.ca/E/pbg/tf/rc231/rc231-14e.pdf>.

It is the sole responsibility of the Contractor to ensure that the information and account number submitted to Canada via their Vendor Electronic Payment Registration form is up to date. Should the Contractor's information within the Vendor Electronic Payment Registration form not be accurate or up to date, the provisions identified herein under Article 16 – Payment Period and Article 17 - Interest on Overdue Accounts, set out in 2035 General Conditions (2014-03-01) forming part of this Contract will not apply, until the Contractor corrects the matter.

7.19.2 Payment by Credit Card

The Contractor shall accept Government of Canada Acquisition Cards (credit cards) for payment of the goods and/or services described herein. Payments by credit card will not be subject to Article 16 – Payment Period and Article 17 - Interest on Overdue Accounts, set out in 2035 General Conditions (2014-03-01) forming part of this Contract.

The CRA Acquisition Card is currently a **MasterCard** provided by Bank of Montreal. At any time during the period of the Contract, including any exercised option period(s), the CRA reserves the right to change its acquisition card type or provider.



7.19.3 Payment by Cheque

The Contractor shall accept Government of Canada cheques for the payment of goods and/or services described herein. Payments by cheque will be subject to Article 16 – Payment Period and Article 17 - Interest on Overdue Accounts, set out in 2035 General Conditions (2014-03-01) forming part of this Contract.

7.20 DISCRETIONARY AUDIT

1. The following are subject to government audit before or after payment is made:
 - a. The amount claimed under the Contract, as computed in accordance with the Basis of Payment, including time charged.
 - b. The accuracy of the Contractor's time recording system.
 - c. The estimated amount of profit in any firm-priced element, firm time rate, firm overhead rate, or firm salary multiplier, for which the Contractor has provided the appropriate certification. The purpose of the audit is to determine whether the actual profit earned on a single contract if only one exists, or the aggregate of actual profit earned by the Contractor on a series of negotiated contracts containing one or more of the prices, time rates or multipliers mentioned above, during a particular period selected, is reasonable and justifiable based on the estimated amount of profit included in earlier price or rate certification(s).
 - d. Any firm-priced element, firm time rate, firm overhead rate, or firm salary multiplier for which the Contractor has provided a "most favoured customer" certification. The purpose of such audit is to determine whether the Contractor has charged anyone else, including the Contractor's most favoured customer, lower prices, rates or multipliers, for like quality and quantity of goods or services.
2. Any payments made pending completion of the audit must be regarded as interim payments only and must be adjusted to the extent necessary to reflect the results of the said audit. If there has been any overpayment, the Contractor must repay Canada the amount found to be in excess.

7.21 TRAVEL AND LIVING EXPENSES

The CRA will not cover any travel and living expenses.

7.22 TAXES – FOREIGN BASED CONTRACTOR TAXES

Unless specified otherwise in the Contract, the price includes no amount for any federal excise tax, state or local sales or use tax, or any other tax of a similar nature, or any Canadian tax whatsoever. The price, however, includes all other taxes. If the Work is normally subject to federal excise tax, Canada will, upon request, provide the Contractor a certificate of exemption from such federal excise tax in the form prescribed by the federal regulations.

Canada will provide the Contractor evidence of export that may be requested by the tax authorities. If, as a result of Canada's failure to do so, the Contractor has to pay federal excise tax, Canada will reimburse the Contractor if the Contractor takes such steps as Canada may require to recover any payment made by the Contractor. The Contractor must refund to Canada any amount so recovered.

7.23 LIQUIDATED DAMAGES FOR SYNERGY NON-COMPLIANCE

- a) If the Contractor fails to meet the Synergy requirements and the response and resolution times as specified in Annex E: Requirements for a CRA Synergy Solution, within the time specified in the Contract, the Contractor agrees to pay to the CRA, liquidated damages for each hour of delay, or any part thereof, for the time spent by the CRA Acquisition Service Desk addressing any issues that occur due to the failure of the Contractor to meet the CRA's Synergy requirements, based on the following calculation:



Calculation of the hourly rate is based on the current salary of a SP-06, level 3, including the bilingual bonus and a 20% premium representing benefits. The salary for this occupation group is found at <http://www.cra-arc.gc.ca/crrs/wrkng/pyrts/sp-eng.html>

The liquidated damages amount is calculated as follows $[(SP-06, \text{ level } 3 + \text{ Bilingual Bonus}) * 1.2] / (261 \text{ days} * 7.5 \text{ hours}) = \text{hourly liquidated damage amount.}$

Any overtime that is required after a 7.5 hour day will be calculated by taking the amount for each calendar day multiplied by 1.5.

The total amount of the liquidated damages must not exceed 10% of the Contract's value.

- b) CRA and the Contractor agree that the amount stated above is their best pre-estimate of the loss to the CRA in the event of such a failure, and that it is not intended to be, nor is it to be interpreted as, a penalty.
- c) CRA will have the right to hold back, drawback, deduct or set off from and against the amounts of any monies owing at any time by CRA to the Contractor, any liquidated damages owing and unpaid under this section.
- d) Nothing in this section must be interpreted as limiting the rights and remedies which CRA may otherwise have under the Contract.

7.24 INVOICING INSTRUCTIONS

Each invoice must be supported by:

- a) a copy of time sheets to support the time claimed;
 - b) a copy of the release document and any other documents as specified in the Contract;
 - c) a copy of the monthly progress report.
 - d) contractor's business name and contact information
 - e) invoice issued to: CRA & Requesting Manager's name
 - f) invoice number
 - g) confirmation number (tracking number from the CRA Service Request form)
 - h) Purchase Order Number (PCO) - tracking number from Synergy
 - i) type of service delivered (e.g. ergonomic assessment, follow-up ergonomic assessment etc.)
 - j) date of service
 - k) description of the service provided, including the breakdown between administrative costs and professional costs
 - l) fees (firm rate or hourly rate)
 - m) HST
 - n) Tax number
 - o) Total costs
1. Invoices must be distributed as follows:
- a) The original and one (1) copy must be forwarded to the Project Authority of the Contract, identified under the section entitled "Authorities", for certification and payment.
 - b) One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.



7.25 INVOICING – SYNERGY ORDERS

a) Synergy Orders (Including Purchase Card Orders):

For Services:

For services, the Contractor must provide written details of the services provided. The summary must specify the Contractor's name, address, and GST registration number, the PCO number, CRA Purchaser name, date the service was completed, description of the service, cost (before tax), tax amount, and total amount to be charged to the CRA Ghost Card including applicable tax.

b) Task Authorizations and External Purchases:

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.
2. Invoices must be distributed as follows:
 - a) The original and one (1) copy must be forwarded to the Project/Technical Authority of the Contract identified under the section entitled "Authorities" of the Contract. for certification and payment.
 - b) One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.
 - c) One (1) copy must be forwarded to the consignee (The person to whom goods are shipped).

7.26 CERTIFICATIONS

The continuous compliance with the certifications provided by the Contractor in its bid and the ongoing cooperation in providing associated information are conditions of the Contract. Certifications are subject to verification by Canada during the entire period of the contract. If the Contractor does not comply with any certification, fails to provide the associated information, or it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

7.26.1 Federal Contractors Program for Employment Equity - Default by the Contractor

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC) - Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the "FCP Limited Eligibility to Bid" list. The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

7.27 JOINT VENTURE

If the Contract is awarded to a joint venture, all members of the joint venture will be jointly and severally or solidarily liable for the performance of the Contract.

In the case of a contractual joint venture, no dispute, claim or action for damages, whether based in contract, or in tort, or any other theory of law, howsoever arising from the Request for Proposal, Contract, or any other related or subsequently issued documents including without limitation Task Authorizations, Contract Amendments, may be commenced, or brought against the CRA, including without limitation any of its officers, employees or agents unless each member of the joint venture is a party to such dispute, claim, or action (as the case may be).

The Contractor shall obtain the prior written approval of the Contracting Authority to any change in the membership of a contractual joint venture after Contract Award. Any change in the membership of a contractual joint venture after Contract Award without the prior written approval of the Contracting Authority shall be deemed to be default under the Contract.

The joint venture represents and warrants that it has appointed and granted full authority to (name to be inserted at Contract Award), the "Lead Member", to act on behalf of all members as its representative for the



purposes of executing documentation relating to the Contract, including but not limited to Contract Amendments and Task Authorizations.

In the event of a contractual joint venture, all payments due and owing to the joint venture shall be made by the Canada Revenue Agency to the Lead Member of the joint venture. Any such payment to the Lead Member of the joint venture shall be deemed to be payment to the joint venture and shall act as a release from all the members of the joint venture.

By giving notice to the Lead Member the Canada Revenue Agency will be deemed to have given notice to all the members of the joint venture.

7.28 APPLICABLE LAWS

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

7.29 APPLICABLE LEGISLATION, REGULATIONS, AND POLICIES

The following Acts and Policies apply to this requirement:

- *Privacy Act;*
- *Personal Information Protection and Electronic Documents Act;*
- *Canada Labour Code Part II;*
- *CRA Occupational Health and Safety Policy;*
- *CRA Security Policy; and*
- *CRA Injury and Illness Policy.*

The statutes are available from the following website: <http://laws.justice.gc.ca/>

7.30 PRIORITY OF DOCUMENTS

If there is any conflict or inconsistency between the wording of any documents that appear on the list, the wording of the document that first appears on the list shall take precedence over the wording of any document that subsequently appears on the list.

- a) The Articles of Agreement including all Annexes:
 - Annex A: Statement of Work and Attachments;
 - Annex B: Basis of Payment;
 - Annex C: Security Requirements Check List;
 - Annex D: Insurance Requirements;
 - Annex E: Requirements for CRA Synergy Solution;
 - Annex F: Synergy Proof of Compliance Testing (PoSC);
- b) The Purchase Card Order (PCO) using the Synergy ordering system or an External Purchase outside the Synergy ordering system;
- c) The General Conditions 2035 Higher Complexity - Services (2014-03-01);
- d) The Solicitation No. 1000320941 dated December 17, 2014 including any amendments thereto;
- e) The Contractor's proposal dated (insert date of bid), (If the bid was clarified, insert) as clarified on _____ (and insert date(s) of clarification(s)).



7.31 TRAINING AND FAMILIARIZATION OF CONTRACTOR PERSONNEL

Training of Contractor Personnel

Any training required by a new or replacement resource will be the responsibility of the Contractor, including training the resource for newly implemented software. The Contractor will assume all associated costs, including training pertaining to familiarization during the start-up of the Contract and Contract period for staff replacements. Training of the resource during the start-up period must take place without a reduction in service level. Time spent on such training will not be billed to, nor paid by, CRA.

Familiarization Period

Prior to the completion of the Contract, it may be necessary for another resource to undertake a period of familiarization and training before the completion date. The Contractor will be required to familiarize the incoming resource according to the process described above or through the use of another approach negotiated with and acceptable to CRA.

7.32 FOREIGN NATIONALS

7.32.1 Foreign Nationals (Canadian Contractor) (to be deleted at contract award if not applicable)

The Contractor must comply with Canadian immigration requirements applicable to foreign nationals entering Canada to work temporarily in fulfillment of the Contract. If the Contractor wishes to hire a foreign national to work in Canada to fulfill the Contract, the Contractor should immediately contact the nearest Service Canada regional office to enquire about Citizenship and Immigration Canada's requirements to issue a temporary work permit to a foreign national. The Contractor is responsible for all costs incurred as a result of non-compliance with immigration requirements.

7.32.2 Foreign Nationals (Foreign Contractor) (to be deleted at contract award if not applicable)

The Contractor must comply with Canadian immigration legislation applicable to foreign nationals entering Canada to work temporarily in fulfillment of the Contract. If the Contractor wishes to hire a foreign national to work in Canada to fulfill the Contract, the Contractor should immediately contact the nearest Canadian Embassy, Consulate or High Commission in the Contractor's country to obtain instructions, information on Citizenship and Immigration Canada's requirements and any required documents. The Contractor is responsible to ensure that foreign nationals have the required information, documents and authorizations before performing any work under the Contract in Canada. The Contractor is responsible for all costs incurred as a result of non-compliance with immigration requirements.

7.33 INSURANCE REQUIREMENTS

The Contractor must comply with the insurance requirements specified in Annex D. 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) business 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. For Canadian-based Contractors, coverage must be placed with an Insurer licensed to carry out business in Canada however, for Foreign-based Contractors, coverage must be placed with an Insurer with an A.M. Best Rating no less than "A-". The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

7.34 ALTERNATIVE DISPUTE RESOLUTION

NEGOTIATION FOLLOWED BY MANDATORY MEDIATION, THEN, IF NECESSARY BY ARBITRATION OR LITIGATION



The parties agree to meet, negotiate in good faith, and attempt to resolve, amicably, any dispute arising out of or related to this contract or any breach thereof.

If the parties are unable to resolve the dispute through negotiations within 10 working days, the parties agree to attempt to resolve the dispute through mediation by submitting the dispute to a sole mediator selected jointly by the parties. The mediator will be chosen from a roster of qualified mediators maintained by the Canada Revenue Agency. All costs shall be shared equally between the disputing parties.

If a dispute cannot be settled with a 15 calendar day period after the mediator has been appointed, or if the parties are unable to select a mediator within 15 calendar days of the date of provision of notice by one party to the other of the intention to proceed to mediation, or such longer period as agreed to by the parties, the parties shall have the right to resort to any remedies permitted by law, including but not limited to arbitration or litigation.

All defences based on the passage of time shall be tolled pending the termination of the mediation.

7.34.1 Procurement Ombudsman

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1 (I) of the *Department of Public Works and Government Services Act* will, on request and consent of the parties, participate in these meetings to resolve any such dispute, and subject to their consent to bear the cost of such process, provide to the parties a proposal for an alternative dispute resolution process to resolve their dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at boa.opo@boa.opo.gc.ca.

7.35 CONTRACT ADMINISTRATION

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

7.36 ANNEXES

The following Annexes apply to and form part of the Contract:

- ANNEX A: STATEMENT OF WORK
- ANNEX B: BASIS OF PAYMENT
- ANNEX C: SECURITY REQUIREMENTS CHECK LIST (SRCL)
- ANNEX D: INSURANCE REQUIREMENTS
- ANNEX E: REQUIREMENTS FOR CRA SYNERGY SOLUTIONS
- ANNEX F: PROOF OF SYNERGY COMPLIANCE TESTING (POSC)



ATTACHMENT 1: MANDATORY CRITERIA

1. EVALUATION PROCEDURES

Bids will be evaluated in accordance with all the mandatory evaluation criteria detailed below. Bids failing to adequately respond to ALL mandatory requirements will be considered non-responsive and will be given no further consideration.

2. MANDATORY TECHNICAL CRITERIA

Bids will be evaluated in accordance with all the mandatory evaluation criteria detailed below. The Bidder must provide supporting documentation in its proposal as requested by CRA, in order to demonstrate that each technical mandatory requirement has been met. To assist with the evaluation process, it is requested that the Bidder complete the table included below, to indicate where in its proposal the information is located. Bids that fail to meet all mandatory requirements will be declared non-responsive and will receive no further consideration.

Criteria	Mandatory Technical Criteria	Bid Preparation Instructions
MT1	<p>The Bidder must have provided Ergonomic Services, as described in Annex A: Statement of Work (SOW), either directly or indirectly through subcontractor(s) or joint venture arrangements, to at least three (3) client organizations, in the past five (5) years from the date of bid closing. For more certainty, services provided through subcontractor(s) will be deemed acceptable only if the Bidder was the primary Contractor for these services.</p>	<p>To demonstrate compliance with this mandatory criteria the Bidder must provide the following information for each public or private sector organization cited:</p> <ul style="list-style-type: none"> • Overview of Ergonomic Services provided. • Start and end dates for the provision for the services. • Name of client organization. • Names, titles, telephone numbers, and email addresses of the primary and secondary client contacts, who can confirm the information provided.
MT2	<p>The Bidder must have provided Ergonomic Services, as described in Annex A: Statement of Work (SOW), either directly or indirectly through subcontractor(s) or joint venture arrangements, in a minimum of four (4) different regions* as defined by the CRA, within the past five (5) years from the date of bid closing. For more certainty, services provided through subcontractor(s) will be deemed acceptable only if the Bidder was the primary Contractor for these services.</p> <p>* National Capital Region, Atlantic Region, Ontario Region, Pacific Region, Prairie Region, Québec Region. (as described in Appendix F to Annex A)</p>	<p>To demonstrate compliance with this mandatory criteria the Bidder must provide the following information:</p> <ul style="list-style-type: none"> • Each region where the Bidder provided Ergonomic Services, as described in Appendix F to Annex A. • Overview of the Ergonomic Services provided. • Name of client organization(s) in each region, as required. • Names, titles, telephone numbers, and email addresses of the primary and secondary client contacts, who can confirm the region and the service provided.



MT3	At least one (1) of the client organizations cited in response to Mandatory Criterion M1 must have a minimum of 500 employees.	The Bidder must identify which of the client organizations cited in Mandatory Criterion M1 has a minimum of 500 employees.
MT4	The Bidder's Ergonomic Services must be managed by a dedicated Administrator with a minimum of three (3) years experience within the last ten (10) years (from date of bid closing) in managing Ergonomic Services.	The Bidder must provide the Curriculum Vitae (CV) of the proposed dedicated Administrator. The CV must clearly demonstrate that the dedicated Administrator meets the experience requirements.
MT5	Quality assurance of the Bidder's Ergonomic Services must be provided by an Accredited Ergonomist with experience in providing quality assurance, which must include, but is not limited to, the following activities: <ul style="list-style-type: none">• Review (random and upon request) of Ergonomic reports;• Identify issues and provide clarification when required; and• Implement corrective actions to ensure that all Ergonomic Services meet best practices and client requirements.	The Bidder must provide the Curriculum Vitae (CV) of the proposed Accredited Ergonomist, along with proof of accreditation. The CV must clearly demonstrate that the Accredited Ergonomist meets the specified experience requirements.
MT6	The Bidder must certify that they are able to provide Ergonomic Services in both official languages, to either a CRA representative, or to an employee as required.	To demonstrate compliance, the Bidder must sign the relevant certification document found in Attachment 4.



ATTACHMENT 2: POINT RATED CRITERIA

Technical proposals will be assessed separately against the evaluation criteria identified below. Point-rated criteria not addressed in the bidder's proposal will result in a score of zero being assigned against that particular criterion.

Rated Criteria No.	Evaluation Subject	Points Available
R1	Current Corporate Capability	96
R1.1	Experience Providing Ergonomic Services as described in the SOW	36
R1.2	Geographic Capacity (Current Regional Capacity)	30
R1.3	Size of Client Organizations	30
R2	Strategy to Meet CRA's Needs	50
R2.1	Planned resources to meet CRA needs (Future Site Capacity)	20
R2.2	Experience of the Dedicated Administrator	15
R2.3	Experience of Accredited Ergonomist (Quality Assurance Program)	15
R3	Service Delivery	60
R3.1	Practice Management Software	16
R3.2	Credentials Management Process	16
R3.3	Structured Quality Assurance Program	16
R3.4	Statistical Capability	12
R4	Sustainable Development	5
R4.1	Environmental Strategy	5
Total		211
Mandatory Minimum Score Total 65%		137



Criteria	Point-Rated Technical Criteria	Points Available	Allocation of Points
R1	Corporate Capability		
R1.1	Experience providing Ergonomic Services <p>This criterion will evaluate the number of consecutive years of experience, up to the date of bid closing, the Bidder has in providing Ergonomic Services, either directly, or indirectly through subcontractor(s) or joint venture arrangements. For more certainty, services provided through subcontractor(s) will be deemed acceptable only if the Bidder was the primary Contractor for these services.</p> <p>The Bidder's proposal should specify the number of consecutive years the Bidder has provided Ergonomic Services, and should provide the following information:</p> <ul style="list-style-type: none">• A client history for the consecutive years of experience specified. This can be more than one client, but the years of experience must be consecutive.• The start and end dates for the provision of services for each client cited.	36	<p>To obtain points for this criterion, the Bidder's proposal should specify the period of time for which it has been consecutively providing Ergonomic Services, either directly, or indirectly through subcontractor(s) or joint venture arrangements.</p> <p>The points will be awarded as follows:</p> <p>0 Points – less than 1 year</p> <p>24 Points – 1 year to less than 3 years</p> <p>30 Points - 3 years to less than 7 years</p> <p>36 Points - 7 years or more</p>



Criteria	Point-Rated Technical Criteria	Points Available	Allocation of Points
<p>R1.2</p>	<p>Geographic Capacity</p> <p>This criterion will evaluate the number of Regions in which the Bidder has provided Ergonomic Services, as described in Annex A, either directly or indirectly through subcontractor(s) or joint venture arrangements. For more certainty, services provided through subcontractor(s) will be deemed acceptable only if the Bidder was the primary Contractor for these services.</p> <p>The Bidder should indicate the CRA regions* in which the Bidder has provided Ergonomic Services, to at least three (3) client organizations, within the past five (5) years from the date of bid closing. For each region, the Bidder should provide the following information:</p> <ul style="list-style-type: none"> • Name of client organization(s) • Overview of services provided for each client organization. • Start and end dates of the provision of services. • Names, titles, telephone numbers, and email addresses of the primary and secondary client contacts, who can confirm the information provided. <p>* National Capital Region, Atlantic Region, Ontario Region, Pacific Region, Prairie Region, Québec Region. (as described in Appendix F to Annex A)</p>	<p>30</p>	<p>Points will be awarded based on the number of regions where Ergonomic Services as described in the SOW were provided, as follows:</p> <p>Points will only be awarded where Ergonomic Services, as described in the SOW, were provided to at least three (3) client organizations, within the past five (5) years from the date of bid closing.</p> <p>0 Points – less than 4 regions. 18 Points – 4 regions. 24 Points – 5 regions. 30 Points – 6 regions.</p>



Criteria	Point-Rated Technical Criteria	Points Available	Allocation of Points
<p>R1.3</p>	<p>Size of Client Organizations</p> <p>This criterion will evaluate the size of the client organization for which the Bidder has provided Ergonomic Services as described in Annex A, either directly or indirectly through subcontractor(s) or joint venture arrangements. For more certainty, services provided through subcontractor(s) will be deemed acceptable only if the Bidder was the primary Contractor for these services.</p> <p>The Bidder should provide the name of up to two (2) client organizations for which the Bidder has provided Ergonomic Services and for each client organization cited provide the following information:</p> <ul style="list-style-type: none"> • Name of client organization(s) • Overview of Ergonomic Services provided. • The number of employees of the client organization at the time the provision of services commenced. • Names, titles telephone numbers and email addresses of the primary and secondary client contacts who can confirm the information provided. 	<p>30</p>	<p>For each client organization cited, the following points will be awarded based on the number of employees at the time the provision of services commenced.</p> <p>The points will be awarded as follows:</p> <p>0 Points – The client organization has 500 employees or less.</p> <p>6 Points – The client organization has between 501 and 1500 employees.</p> <p>9 Points – The client organization has between 1501 and 3000 employees.</p> <p>12 Points – The client organization has between 3001 and 5000 employees.</p> <p>15 Points – The client organization has more than 5000 employees.</p> <p>Each client organization will be scored separately.</p> <p>A maximum of 15 points are available for each client organization.</p>



Criteria	Point-Rated Technical Criteria	Points Available	Allocation of Points
R2	Strategy to Meet CRA's needs		
R2.1	<p>Geographic Capacity for Ergonomic Services.</p> <p>This criterion will evaluate the Bidder's ability to provide Ergonomic Services to the CRA offices listed at Appendix F to Annex A.</p> <p>The Bidder should identify the names of resources or firms that the Bidder will utilize to provide the given service to each CRA office.</p> <p>When responding to this criterion, the Bidder is to complete and submit Table R2.1.</p>	20	<p>The following points will be awarded based on the information provided in the Bidder's proposal regarding the Bidder's ability to provide Ergonomic Services to the CRA offices listed at Appendix F to Annex A.</p> <p>0 Points - The Bidder's proposal does not contain any information on its ability to provide ergonomics to CRA offices or demonstrates ability to provide Ergonomic Services to less than 50% (54) of the CRA offices.</p> <p>5 points – The Bidder's information demonstrates its ability to provide Ergonomic Services to at least 50% (54) but less than 95% (103) of the CRA offices.</p> <p>15 points – The Bidder's information demonstrates its ability to provide Ergonomic Services to at least 95% (103) but not all of CRA offices.</p> <p>20 points – The Bidder's information demonstrates its ability to provide Ergonomic Services to all 108 CRA locations.</p>



Criteria	Point-Rated Technical Criteria	Points Available	Allocation of Points
R2.2	Experience of the Dedicated Administrator This criterion will evaluate the number of years of experience of the proposed Administrator in managing Ergonomic Services. To obtain points for this criterion, the Curriculum Vitae provided for the proposed Administrator must clearly outline the number of years of experience in managing Ergonomic Services.	15	The following points will be awarded based on the number of years experience of the proposed Administrator, as demonstrated in the Curriculum Vitae provided. The points will be awarded as follows: 0 Points – Less than three (3) years of experience in managing Ergonomic Services. 5 Points - Three (3) years to less than five (5) years of experience in managing Ergonomic Services. 10 Points - Five (5) years to less than seven (7) years of experience in managing Ergonomic Services. 15 Points - Seven (7) years or more of experience in managing Ergonomic Services.
R2.3	Experience of Accredited Ergonomist in Providing Oversight and Quality Assurance. This criterion will evaluate the number of years of experience of the proposed Accredited Ergonomist, in providing oversight and quality assurance for Ergonomic Services. To obtain points for this criterion, the Curriculum Vitae provided for the proposed Ergonomist must clearly outline the number of years of experience in this role.	15	The following points will be awarded based on the number of years of experience of the proposed Accredited Ergonomist, as demonstrated in the Curriculum Vitae provided. 0 Points - less than one (1) year of experience in providing quality assurance for Ergonomic Services. 5 Points - One (1) year to less than three (3) years of experience in providing quality assurance for Ergonomic Services. 10 Points - Three (3) years to less than five (5) years of experience in providing quality assurance for Ergonomic Services. 15 Points - Five (5) or more years of experience in providing quality assurance for Ergonomic Services.



Criteria	Point-Rated Technical Criteria	Points Available	Allocation of Points
R3	Service Delivery		
R3.1	Use of a Practice Management Software Suite This criterion will evaluate the Practice Management Software suite utilized by the Bidder. The Bidder should describe the Practice Management Software it currently utilizes to manage the provision of Ergonomic Services, and demonstrate that it includes the following functionalities: <ul style="list-style-type: none">• appointment schedule management• service follow-up• automated billing	16	The following points will be awarded based on the information provided in the Bidder's proposal regarding the Bidder's Practice Management Software. 0 Points - The Bidder's proposal does not demonstrate that the Bidder utilizes a Practice Management Software suite. 7 Points - The Bidder's proposal demonstrates that the Bidder uses a Practice Management Software suite, but it does not include any of the listed functionalities. 10 Points The Bidder's proposal demonstrates that the Bidder uses a Practice Management Software suite which includes 1 of the listed functionalities. 13 Points - The Bidder's proposal demonstrates that the Bidder uses a Practice Management Software suite which includes 2 of the listed functionalities. 16 Points - The Bidder's proposal demonstrates that the Bidder uses a Practice Management Software suite which includes 3 of the listed functionalities.



Criteria	Point-Rated Technical Criteria	Points Available	Allocation of Points
R3.2	<p>Credentials Management Process</p> <p>This criterion will evaluate the rigour of Credential Verification Processes in terms of providing on-going assurance that credentials are valid and that professionals will remain in good standing throughout the lifetime of any resulting contract.</p> <p>The Bidder should describe the processes it employs to conduct credential checks for employees or subcontractors, and identify the following:</p> <ol style="list-style-type: none">1. The screening tools or solution used to ensure that its professionals, whether employees or subcontractors:<ol style="list-style-type: none">a. Are licensed, registered, or certified, in accordance with applicable provincial regulations.b. Are not under investigation.c. Have no criminal record.d. Carry the appropriate professional liability insurance.2. The established schedule for conducting credential checks.	16	<p>The following points will be awarded based on the information provided in the Bidder's proposal regarding its Credential Verification Processes.</p> <p>0 Points - The Bidder's proposal does not provide any information on its credential verification processes, or the Bidder's credential verification process does not cover all of the four (4) items listed under 1. (a, b, c, and d).</p> <p>The Bidder's proposal demonstrates that the Bidder conducts credential checks to ensure that its professionals, whether employees or subcontractors:</p> <ol style="list-style-type: none">a. 3 Points - Are licensed, registered, or certified, in accordance with applicable provincial regulations.b. 3 Points - Are not under investigation.c. 3 Points - Have no criminal record.d. 3 Points - Carry the appropriate professional liability insurance. <p>4 Points – Four additional points may be awarded if the description of the credential verification process provides information that demonstrates that the credential checks are scheduled to coincide with the expiration of the license or certification (as applicable), or are performed on an ad-hoc basis several times per year. These additional points will <u>not</u> be awarded if point (a) is not demonstrated.</p>



Criteria	Point-Rated Technical Criteria	Points Available	Allocation of Points
<p>R3.3</p>	<p>Structured Quality Assurance Program</p> <p>This criterion will evaluate the effectiveness of the Bidder's structured Quality Assurance Program that ensures contract compliance, client satisfaction and that remedial action is taken when issues are identified.</p> <p>The Bidder should describe its processes that support a comprehensive Quality Assurance Program to demonstrate how the bidder will ensure contract compliance, client satisfaction and that when issues or problems are reported, appropriate action is taken immediately. These may include, but not are not limited to, the following:</p> <ul style="list-style-type: none"> ● Policy or Directives on Quality Assurance; ● Control mechanisms established to ensure contract compliance; ● Actions taken as a result of a feedback received from the briefings, assessments or other measurement tools; ● Description of the approach taken to resolve common problems or client concerns regarding ergonomic services; ● Training material or information on how to handle client's concerns; ● Examples of problems solved and remedial action(s) taken such as re-assessments, documentation reviews, etc. 	<p>16</p>	<p>The following points will be awarded based on the information provided in the Bidder's proposal regarding the Bidder's structured Quality Assurance Program for ensuring contract compliance and client satisfaction, as well as remedial action taken when issues are identified:</p> <p>0 Points - The Bidder's proposal does not contain any information on its Quality Assurance Program for ensuring contract compliance and client satisfaction, as well as remedial action taken when issues are identified. .</p> <p>0 Points - The Bidder's proposal in response to this criterion includes less than 2 of the 5 listed items.</p> <p>3 Points - The Bidder's proposal in response to this criterion includes 2 of the 5 listed items.</p> <p>6 Points - The Bidder's proposal in response to this criterion includes 3 of the 5 listed items.</p> <p>9 Points - The Bidder's proposal in response to this criterion includes 4 of the 5 listed items.</p> <p>12 Points - The Bidder's proposal in response to this criterion includes 5 of the 5 listed items.</p> <p>16 points – The Bidder's proposal in response to this criterion includes more than 5 of the listed items.</p> <p>The CRA may award points for items which are not indicated herein yet are deemed by the CRA to be valid responses which address the criteria.</p>



Criteria	Point-Rated Technical Criteria	Points Available	Allocation of Points
R3.4	<p>Statistical Capability</p> <p>This criterion will evaluate the capability of the Bidder to provide statistical information.</p> <p>The Bidder should demonstrate its current capability to provide statistical information in line with the CRA's reporting requirements as stated in Annex A under 6.4 Statistical Reporting Requirements.</p> <p>To obtain points for this criterion the Bidder should provide a copy (current template) of a statistical report that clearly identifies the statistical information provided. If the Bidder's statistical information exceeds the CRA's requirement, the Bidder should outline how it may be beneficial to the CRA.</p>	12	<p>The following points will be awarded based on the information provided in the Bidder's proposal regarding the Bidder's capability to provide statistical information.</p> <p>0 Points - The Bidder's proposal does not demonstrate that the bidder's current statistical capabilities can meet the CRA's reporting requirements.</p> <p>7 Points - The Bidder's proposal demonstrates that the bidder's current statistical capabilities meet the CRA's reporting requirements.</p> <p>12 Points - The Bidder's proposal demonstrates that the bidder's current statistical capabilities exceed the CRA's reporting requirements. The Bidder must demonstrate how the additional statistical information benefits the CRA.</p>



Critères	Critères techniques de cotation numérique	Points disponibles	Attribution des points
R4	Sustainable Development		
R4.1	Environmental strategy The Bidder should provide details on its environmental policy in place to manage its environmental commitment for sustainability. The Bidder should describe its environmental strategy and demonstrate the ways in which its products, services, and operations reduce negative impacts on the environment. The Bidder should provide details on its waste reduction strategies, operational best practices and other initiatives that the Bidder is involved in that either eliminate or reduce negative impacts on the environment.	5	0 Points – The Bidder does not address its environmental strategy. 1 Point – The Bidder describes its environmental strategy but does not identify ways in which its products, services, and operations reduce negative impacts on the environment. 3 Points – The Bidder describes its environmental strategy and identifies ways in which its products, services, and operations reduce negative impacts on the environment. 5 Points – The Bidder describes its environmental strategy and identifies ways in which its products, services, and operations reduce negative impacts on the environment, including operational best practices and other initiatives that the Bidder is involved in that either eliminate or reduce negative impacts on the environment.



Table R2.1

In Accordance with Part 4: Evaluation and Selection, Step 7: Conditions Precedent to Contract Award; and Part 6: Security, Financial and Other requirements, clause 6.1 Ergonomic Practitioner Credentials, the proposed ergonomic practitioners' credentials and security clearances will be verified by the CRA prior to contract award.

	REGION	ADDRESS, POSTAL CODE	CITY	PROVINCE	Ergonomic Services
					The names of resources or firms that the Bidder will utilize to provide Ergonomic Services to each CRA office.
1	ATL	201 St. George Street, E2A 4L8	Bathurst	NB	
2	ATL	217-770 Main St, E1C 1E7	Moncton	NB	
3	ATL	126 Prince William Street, E2L 2B6	Saint John	NB	
4	ATL	555 McAllister Drive, E2J 2S8	Saint John	NB	
5	ATL	1 Regent Square, A2H 7K6	Corner Brook	NF	
6	ATL	28C Cromer Avenue, A2A 1X2	Grand Falls-Windsor	NF	
7	ATL	132 Glencoe Drive, A1N 4R5	Mount Pearl	NF	
8	ATL	165 Duckworth Street, A1C 1G4	St. John's	NF	
9	ATL	290 Empire Avenue, A1B 3Z1	St. John's	NF	
10	ATL	1969 Upper Water Street, B3J 2T5	Halifax	NS	
11	ATL	1557 Hollis Street, B3J 3V4	Halifax	NS	
12	ATL	47 Dorchester Street, B1P 5Z2	Sydney	NS	
13	ATL	1-30 Brackley Point Road, PO Box 8500, C1A 8L3	Charlottetown	PE	
14	ATL	275 Pope Road, C1N 6A2	Summerside	PE	
15	HQ	20 Fitzgerald Road, K2H 8R6	Nepean	ON	
16	HQ	21 Fitzgerald Road, K2H 9J4	Nepean	ON	
17	HQ	25 Fitzgerald Road, K2H 1C3	Nepean	ON	
18	HQ	35 Fitzgerald Road, K2H 1E6	Nepean	ON	
19	HQ	250 Albert Street, K1P 6M1	Ottawa	ON	



	REGION	ADDRESS, POSTAL CODE	CITY	PROVINCE	Ergonomic Services
					The names of resources or firms that the Bidder will utilize to provide Ergonomic Services to each CRA office.
20	HQ	47 Clarence Street, K1N 9K1	Ottawa	ON	
21	HQ	750 Heron Road, K1V 1A7	Ottawa	ON	
22	HQ	112 Kent Street, K1P 5P2	Ottawa	ON	
23	HQ	200 Laurier Avenue West, K1P 6M7	Ottawa	ON	
24	HQ	410 Laurier Avenue West, K1R 1B7	Ottawa	ON	
25	HQ	427 Laurier Avenue West, K1R 7Y2	Ottawa	ON	
26	HQ	555 Mackenzie Avenue, K1A 0L5	Ottawa	ON	
27	HQ	99 Metcalfe Street, K1P 6L7	Ottawa	ON	
28	HQ	150 Slater Street, K1P 5M8	Ottawa	ON	
29	HQ	320 Queen Street, K1R 5A3	Ottawa	ON	
30	HQ	2323 Riverside Drive, K1H 8L5	Ottawa	ON	
31	HQ	1730 St. Laurent Boulevard, K1G 5L1	Ottawa	ON	
32	HQ	2465 St. Laurent Boulevard, K1G 6G8	Ottawa	ON	
33	HQ	180 Kent Street, K1A 0L9	Ottawa	ON	
34	HQ	344 Slater Street, K1R 7Y3	Ottawa	ON	
35	HQ	395 Terminal Avenue, K1A 0L5	Ottawa	ON	
36	ONT	81 Mulcaster Street, L4M 6J5	Barrie	ON	
37	ONT	11 Station Street, K8N 2S2	Belleville	ON	
38	ONT	80 National Street, P3E 5P9	Sudbury	ON	
39	ONT	1050 Notre Dame Avenue, P3A 4Z2	Sudbury	ON	
40	ONT	55 Bay Street North, L8R 3P7	Hamilton	ON	
41	ONT	120 King Street West, L8N 1B2	Hamilton	ON	
42	ONT	31 Hyperion Court, K7L 5P3	Kingston	ON	
43	ONT	166 Frederick Street, N2H 2M4	Kitchener	ON	



	REGION	ADDRESS, POSTAL CODE	CITY	PROVINCE	Ergonomic Services
					The names of resources or firms that the Bidder will utilize to provide Ergonomic Services to each CRA office.
44	ONT	50 Queen Street, N2H 6P4	Kitchener	ON	
45	ONT	451 Talbot Street, N6A 5C9	London	ON	
46	ONT	383 Richmond Street, N6A 5E5	London	ON	
47	ONT	5800 Hurontario Street, L5R 3T6	Mississauga	ON	
48	ONT	180 Sheriff Avenue, P1B 7K9	North Bay	ON	
49	ONT	5001 Yonge Street, M2N 6R9	North York	ON	
50	ONT	55 Athol St. E., L1H 1J8	Oshawa	ON	
51	ONT	2215 Gladwin Crescent, K1B 4X9	Ottawa	ON	
52	ONT	875 Heron Road, Building 1, K1A 1B1	Ottawa	ON	
53	ONT	333 Laurier Avenue West, K1P 1C1	Ottawa	ON	
54	ONT	2204 Walkley Road, K1A 1L8	Ottawa	ON	
55	ONT	1161 Crawford Dr, K9J 6X6	Peterborough	ON	
56	ONT	22 Bay Street, P6A 5S2	Sault Ste. Marie	ON	
57	ONT	55 Town Centre Court, M1P 4X4	Scarborough	ON	
58	ONT	200 Town Centre Court, M1P 4Y3	Scarborough	ON	
59	ONT	32 Church Street, St., L2R 3B0	St. Catherines	ON	
60	ONT	130 South Syndicate Avenue, P7E 1C7	Thunder Bay	ON	
61	ONT	655 Bay Street, M5G 2K4	Toronto	ON	
62	ONT	1 Front Street West, M5J 2X6	Toronto	ON	
63	ONT	25 Sheppard Avenue West, M2N 6S6	Toronto	ON	
64	ONT	1555 Wentworth St., L1N 9T6	Whitby	ON	
65	ONT	441 University Ave, N9A 5R2	Windsor	ON	
66	ONT	185 Ouellette Avenue, N9A 4H7	Windsor	ON	
67	PAC	1620 Dickson Avenue, V1Y 9Y2	Kelowna	BC	



	REGION	ADDRESS, POSTAL CODE	CITY	PROVINCE	Ergonomic Services
					The names of resources or firms that the Bidder will utilize to provide Ergonomic Services to each CRA office.
68	PAC	187 Nanaimo Avenue, V2A 1N4	Penticton	BC	
69	PAC	277 Winnipeg Street, V2A 1N6	Penticton	BC	
70	PAC	280 Victoria Street, V2L 4X3	Prince George	BC	
71	PAC	299 Victoria Street, V2L 5B8	Prince George	BC	
72	PAC	13450-102nd Avenue, V3T 5X3	Surrey	BC	
73	PAC	9737 King George Boulevard, V3T 5W6	Surrey	BC	
74	PAC	9755 King George Boulevard, V3T 5E1	Surrey	BC	
75	PAC	1188 West Georgia Street, V6E 4A2	Vancouver	BC	
76	PAC	300 West Georgia Street, V6B 4P4	Vancouver	BC	
77	PAC	757 Hastings Street West, V6C 1A1	Vancouver	BC	
78	PAC	1166 West Pender Street, V6E 3H8	Vancouver	BC	
79	PAC	1010 Seymour Street, V6B 4Y4	Vancouver	BC	
80	PAC	1260 Government Street, V8W 3M4	Victoria	BC	
81	PAC	1415 Vancouver Street, V8V 3W4	Victoria	BC	
82	PRA	1601 Airport Road North East, T2E 8W3	Calgary	AB	
83	PRA	220- 4th Avenue South East, T2G 4X3	Calgary	AB	
84	PRA	10-9700 Jasper Avenue, T5J 4C8	Edmonton	AB	
85	PRA	200 – 419 7th Street South, T1J 0N8	Lethbridge	AB	
86	PRA	4996- 49th Avenue, T4N 6X2	Red Deer	AB	
87	PRA	1039 Princess Avenue, R7A 4J5	Brandon	MB	
88	PRA	360 Main Street, R3C 3Z3	Winnipeg	MB	
89	PRA	66 Stapon Road, R3C 3M2	Winnipeg	MB	
90	PRA	201 Weston Street, R3C 3H4	Winnipeg	MB	
91	PRA	325 Broadway Ave., R3C 4T4	Winnipeg	MB	



	REGION	ADDRESS, POSTAL CODE	CITY	PROVINCE	Ergonomic Services
					The names of resources or firms that the Bidder will utilize to provide Ergonomic Services to each CRA office.
92	PRA	1783 Hamilton Street, S4P 2B6	Regina	SK	
93	PRA	1955 Smith Street, S4P 2N8	Regina	SK	
94	PRA	340-3rd Avenue North, S7K 0A8	Saskatoon	SK	
95	QC	3250 Lapinière Boulevard, J4Z 3T8	Brossard	QC	
96	QC	100 Lafontaine Street, G7M 6X2	Chicoutimi	QC	
97	QC	85 Chemin de La Savane, K1A 1L4	Gatineau	QC	
98	QC	2251 René-Lévesque Boulevard, G7X 6K0	Jonquiere	QC	
99	QC	3400 Jean-Béraud Avenue, H7T 2Z2	Laval	QC	
100	QC	305 René Lévesque Boulevard West, H2Z 1A6	Montreal	QC	
101	QC	400 Place d'Youville, H2Y 3N4	Montreal	QC	
102	QC	155 de la Pointe-aux-Lièvres Street South, G1K 5Y8	Quebec	QC	
103	QC	165 de la Pointe-aux-Lièvres Street South, G1K 5Y8	Quebec	QC	
104	QC	180 de la Cathédrale Avenue, G5L 5H9	Rimouski	QC	
105	QC	44 Avenue du Lac, J9X 4N3	Rouyn-Noranda	QC	
106	QC	4695-12th Avenue, G9N 7V9	Shawinigan-Sud	QC	
107	QC	50 Place de la Cité, J1H 4G9	Sherbrooke	QC	
108	QC	2250 St-Olivier Street, G9A 4E9	Trois-Rivieres	QC	



ATTACHMENT 3: FINANCIAL PROPOSAL

Bidders must quote firm hourly rates and firm unit rates in Canadian funds, GST or HST extra as applicable, for the provision of services outlined in Appendix A “Statement of Work”.

ACRONYMS UTILIZED IN ATTACHMENT 3:

- CYR1** – Contract Year 1
- CYR2** – Contract Year 2
- OYR1** – Option Year 1
- OYR2** – Option Year 2
- OYR3** – Option Year 3
- EA** – Individual Office Ergonomic Assessments
- EFA** – Individual Office Ergonomic Follow-up Assessments
- EARW** – Ergonomic Assessment of employees’ Residential Workstations
- TAS** – Training and Awareness Sessions
- IEA** – Industrial Ergonomic Assessment
- ESME** – Ergonomic Subject Matter Expertise

CYR1 - CONTRACT YEAR ONE (1)

Individual Office Ergonomic Assessments

The Contractor shall be paid a firm unit rate (flat rate) per Individual Office Ergonomic Assessment. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Individual Office Ergonomic Assessment (1 employee) (A)	Firm unit rate per Individual Office Ergonomic Assessment of two (2) or more employees on the same day at the same CRA site (B)	No-show or cancellation with less than 24 hours notice (C)
Atlantic	Each	\$	\$	\$
National Capital	Each	\$	\$	\$
Ontario	Each	\$	\$	\$
Québec	Each	\$	\$	\$
Pacific	Each	\$	\$	\$
Prairies	Each	\$	\$	\$
TOTALS		\$	\$	\$

Individual Office Ergonomic Assessment Bid Price Contract Year 1 (EA CYR1) = Total (A) + Total (B) + Total (C)



Individual Office Ergonomic Follow Up Assessments

The Contractor shall be paid a firm unit rate (flat rate) per Individual Office Ergonomic Follow-up Assessment. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Individual Office Ergonomic Follow-Up Assessment (1 employee) (A)	Firm unit rate per Individual Office Ergonomic Assessment of two (2) or more employees on the same day at the same CRA site (B)	No-show or cancellation with less than 24 hours notice (C)
Atlantic	Each	\$	\$	\$
National Capital	Each	\$	\$	\$
Ontario	Each	\$	\$	\$
Québec	Each	\$	\$	\$
Pacific	Each	\$	\$	\$
Prairies	Each	\$	\$	\$
TOTALS		\$	\$	\$

Individual Office Ergonomic Follow-up Assessment Bid Price Contract Year 1 (EFA CYR1) = Total (A) + Total (B) + Total (C)

Ergonomic Assessment of employees' residential workstations;

The Contractor shall be paid a firm unit rate (flat rate) per Ergonomic Assessment of an employee's residential workstations. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Ergonomic Assessment of an employee's residential (A)	No-show or cancellation with less than 24 hours notice (B)
Atlantic	Each	\$	\$
National Capital	Each	\$	\$
Ontario	Each	\$	\$
Québec	Each	\$	\$
Pacific	Each	\$	\$
Prairies	Each	\$	\$
TOTALS		\$	\$

Individual Ergonomic Assessment of employees' residential workstations Bid Price Contract Year 1 (EARW CYR1) = Total (A) + Total (B)



Training and Awareness Sessions

The Contractor shall be paid a firm hourly rate for delivering local training and awareness sessions.

Region	Unit of Issue	Firm hourly rate for delivering local training and awareness sessions (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$
TOTALS		\$

Training and Awareness Sessions Bid Price Contract Year 1 (TAS CYR1) = Total (A)

Industrial Ergonomic Assessments

The Contractor shall be paid a firm hourly rate for delivering Industrial Ergonomic Assessments.

Region	Unit of Issue	Firm hourly rate for delivering Industrial Ergonomic Assessments (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$
TOTALS		\$

Industrial Ergonomic Assessments Bid Price Contract Year 1 (IEA CYR1) = Total (A)

Ergonomic Subject Matter Expertise

The Contractor shall be paid a firm hourly rate for providing Ergonomic Subject Matter Expertise.

Region	Unit of Issue	Firm hourly rate for delivering Ergonomic Subject Matter Expertise (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$
TOTALS		\$

Ergonomic Subject Matter Expertise Bid Price Contract Year 1 (ESME CYR1) = Total (A)

BID EVALUATION PRICE CONTRACT YEAR 1 =

(EA CYR1) + (EFA CYR1) + (EARW CYR1) + (TAS CYR1) + (IEA CYR1) + (ESME CYR1)



CYR2 - CONTRACT YEAR TWO (2)

Individual Office Ergonomic Assessments

The Contractor shall be paid a firm unit rate (flat rate) per Individual Office Ergonomic Assessment. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Individual Office Ergonomic Assessment (1 employee) (A)	Firm unit rate per Individual Office Ergonomic Assessment of two (2) or more employees on the same day at the same CRA site (B)	No-show or cancellation with less than 24 hours notice (C)
Atlantic	Each	\$	\$	\$
National Capital	Each	\$	\$	\$
Ontario	Each	\$	\$	\$
Québec	Each	\$	\$	\$
Pacific	Each	\$	\$	\$
Prairies	Each	\$	\$	\$
TOTALS		\$	\$	\$

Individual Office Ergonomic Assessment Bid Price Contract Year 2 (EA CYR2) = Total (A) + Total (B) + Total (C)

Individual Office Ergonomic Follow Up Assessments

The Contractor shall be paid a firm unit rate (flat rate) per Individual Office Ergonomic Follow-up Assessment. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Individual Office Ergonomic Follow-Up Assessment (1 employee) (A)	Firm unit rate per Individual Office Ergonomic Follow-up Assessment of two (2) or more employees on the same day at the same CRA site. (B)	No-show or cancellation with less than 24 hours notice (C)
Atlantic	Each	\$	\$	\$
National Capital	Each	\$	\$	\$
Ontario	Each	\$	\$	\$
Québec	Each	\$	\$	\$
Pacific	Each	\$	\$	\$
Prairies	Each	\$	\$	\$
TOTALS		\$	\$	\$

Individual Office Ergonomic Follow-up Assessment Bid Price Contract Year 2 (EFA CYR2) = Total (A) + Total (B) + Total (C)



Ergonomic Assessment of employees' residential workstations;

The Contractor shall be paid a firm unit rate (flat rate) per Ergonomic Assessment of an employee's residential workstations. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Ergonomic Assessment of an employee's residential (A)	No-show or cancellation with less than 24 hours notice (B)
Atlantic	Each	\$	\$
National Capital	Each	\$	\$
Ontario	Each	\$	\$
Québec	Each	\$	\$
Pacific	Each	\$	\$
Prairies	Each	\$	\$
TOTALS		\$	\$

Individual Ergonomic Assessment of employees' residential workstations Bid Price Contract Year 2 (EARW CYR2) = Total (A) + Total (B)

Training and Awareness Sessions

The Contractor shall be paid a firm hourly rate for delivering local training and awareness sessions.

Region	Unit of Issue	Firm hourly rate for delivering local training and awareness sessions (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$
TOTALS		\$

Training and Awareness Sessions Bid Price Contract Year 2 (TAS CYR2) = Total (A)

Industrial Ergonomic Assessments

The Contractor shall be paid a firm hourly rate for delivering Industrial Ergonomic Assessments.

Region	Unit of Issue	Firm hourly rate for delivering Industrial Ergonomic Assessments (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$
TOTALS		\$

Industrial Ergonomic Assessments Bid Price Contract Year 2 (IEA CYR2) = Total (A)



Ergonomic Subject Matter Expertise

The Contractor shall be paid a firm hourly rate for providing Ergonomic Subject Matter Expertise.

Region	Unit of Issue	Firm hourly rate for delivering Ergonomic Subject Matter Expertise (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$
TOTALS		\$

Ergonomic Subject Matter Expertise Bid Price Contract Year 2 (ESME CYR2) = Total (A)

BID EVALUATION PRICE CONTRACT YEAR 2 =

(EA CYR2) + (EFA CYR2) + (EARW CYR2) + (TAS CYR2) + (IEA CYR2) + (ESME CYR2)



OYR1 - OPTION YEAR ONE (1)

Individual Office Ergonomic Assessments

The Contractor shall be paid a firm unit rate (flat rate) per Individual Office Ergonomic Assessment. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Individual Office Ergonomic Assessment (1 employee) (A)	Firm unit rate per Individual Office Ergonomic Assessment of two (2) or more employees on the same day at the same CRA site (B)	No-show or cancellation with less than 24 hours notice (C)
Atlantic	Each	\$	\$	\$
National Capital	Each	\$	\$	\$
Ontario	Each	\$	\$	\$
Québec	Each	\$	\$	\$
Pacific	Each	\$	\$	\$
Prairies	Each	\$	\$	\$
TOTALS		\$	\$	\$

Individual Office Ergonomic Assessment Bid Price Option Year 1 (EA OYR1) = Total (A) + Total (B) + Total (C)

Individual Office Ergonomic Follow Up Assessments

The Contractor shall be paid a firm unit rate (flat rate) per Individual Office Ergonomic Follow-up Assessment. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Individual Office Ergonomic Follow-Up Assessment (1 employee) (A)	Firm unit rate per Individual Office Ergonomic Follow-up Assessment of two (2) or more employees on the same day at the same CRA site. (B)	No-show or cancellation with less than 24 hours notice (C)
Atlantic	Each	\$	\$	\$
National Capital	Each	\$	\$	\$
Ontario	Each	\$	\$	\$
Québec	Each	\$	\$	\$
Pacific	Each	\$	\$	\$
Prairies	Each	\$	\$	\$
TOTALS		\$	\$	\$

Individual Office Ergonomic Follow-up Assessment Bid Price Option Year 1 (EFA OYR1) = Total (A) + Total (B) + Total (C)



Ergonomic Assessment of employees’ residential workstations;

The Contractor shall be paid a firm unit rate (flat rate) per Ergonomic Assessment of an employee's residential workstations. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Ergonomic Assessment of an employee’s residential (A)	No-show or cancellation with less than 24 hours notice (B)
Atlantic	Each	\$	\$
National Capital	Each	\$	\$
Ontario	Each	\$	\$
Québec	Each	\$	\$
Pacific	Each	\$	\$
Prairies	Each	\$	\$
TOTALS		\$	\$

Individual Ergonomic Assessment of employees’ residential workstations Bid Price Option Year 1 (EARW OYR1) = Total (A) + Total (B)

Training and Awareness Sessions

The Contractor shall be paid a firm hourly rate for delivering local training and awareness sessions.

Region	Unit of Issue	Firm hourly rate for delivering local training and awareness sessions (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$
TOTALS		\$

Training and Awareness Sessions Bid Price Option Year 1 (TAS OYR1) = Total (A)

Industrial Ergonomic Assessments

The Contractor shall be paid a firm hourly rate for delivering Industrial Ergonomic Assessments.

Region	Unit of Issue	Firm hourly rate for delivering Industrial Ergonomic Assessments (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$
TOTALS		\$

Industrial Ergonomic Assessments Bid Price Option Year 1 (IEA OYR1) = Total (A)



Ergonomic Subject Matter Expertise

The Contractor shall be paid a firm hourly rate for providing Ergonomic Subject Matter Expertise.

Region	Unit of Issue	Firm hourly rate for delivering Ergonomic Subject Matter Expertise (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$
TOTALS		\$

Ergonomic Subject Matter Expertise Bid Price Option Year 1 (ESME OYR1) = Total (A)

BID EVALUATION PRICE OPTION YEAR 1 =

(EA OYR1) + (EFA OYR1) + (EARW OYR1) + (TAS OYR1) + (IEA OYR1) + (ESME OYR1)



OYR2 - OPTION YEAR TWO (2)

Individual Office Ergonomic Assessments

The Contractor shall be paid a firm unit rate (flat rate) per Individual Office Ergonomic Assessment. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Individual Office Ergonomic Assessment (1 employee) (A)	Firm unit rate per Individual Office Ergonomic Assessment of two (2) or more employees on the same day at the same CRA site (B)	No-show or cancellation with less than 24 hours notice (C)
Atlantic	Each	\$	\$	\$
National Capital	Each	\$	\$	\$
Ontario	Each	\$	\$	\$
Québec	Each	\$	\$	\$
Pacific	Each	\$	\$	\$
Prairies	Each	\$	\$	\$
TOTALS		\$	\$	\$

Individual Office Ergonomic Assessment Bid Price Option Year 2 (EA OYR2) = Total (A) + Total (B) + Total (C)

Individual Office Ergonomic Follow Up Assessments

The Contractor shall be paid a firm unit rate (flat rate) per Individual Office Ergonomic Follow-up Assessment. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Individual Office Ergonomic Follow-Up Assessment (1 employee) (A)	Firm unit rate per Individual Office Ergonomic Follow-up Assessment of two (2) or more employees on the same day at the same CRA site. (B)	No-show or cancellation with less than 24 hours notice (C)
Atlantic	Each	\$	\$	\$
National Capital	Each	\$	\$	\$
Ontario	Each	\$	\$	\$
Québec	Each	\$	\$	\$
Pacific	Each	\$	\$	\$
Prairies	Each	\$	\$	\$
TOTALS		\$	\$	\$

Individual Office Ergonomic Follow-up Assessment Bid Price Option Year 2 (EFA OYR2) = Total (A) + Total (B) + Total (C)



Ergonomic Assessment of employees' residential workstations;

The Contractor shall be paid a firm unit rate (flat rate) per Ergonomic Assessment of an employee's residential workstations. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Ergonomic Assessment of an employee's residential (A)	No-show or cancellation with less than 24 hours notice (B)
Atlantic	Each	\$	\$
National Capital	Each	\$	\$
Ontario	Each	\$	\$
Québec	Each	\$	\$
Pacific	Each	\$	\$
Prairies	Each	\$	\$
TOTALS		\$	\$

Individual Ergonomic Assessment of employees' residential workstations Bid Price Option Year 2 (EARW OYR2) = Total (A) + Total (B)

Training and Awareness Sessions

The Contractor shall be paid a firm hourly rate for delivering local training and awareness sessions.

Region	Unit of Issue	Firm hourly rate for delivering local training and awareness sessions (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$
TOTALS		\$

Training and Awareness Sessions Bid Price Option Year 2 (TAS OYR2) = Total (A)

Industrial Ergonomic Assessments

The Contractor shall be paid a firm hourly rate for delivering Industrial Ergonomic Assessments.

Region	Unit of Issue	Firm hourly rate for delivering Industrial Ergonomic Assessments (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$
TOTALS		\$

Industrial Ergonomic Assessments Bid Price Option Year 2 (IEA OYR2) = Total (A)



Ergonomic Subject Matter Expertise

The Contractor shall be paid a firm hourly rate for providing Ergonomic Subject Matter Expertise.

Region	Unit of Issue	Firm hourly rate for delivering Ergonomic Subject Matter Expertise (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$
TOTALS		\$

Ergonomic Subject Matter Expertise Bid Price Option Year 2 (ESME OYR2) = Total (A)

BID EVALUATION PRICE OPTION YEAR 2 =

(EA OYR2) + (EFA OYR2) + (EARW OYR2) + (TAS OYR2) + (IEA OYR2) + (ESME OYR2)



OYR3 - OPTION YEAR THREE (3)

Individual Office Ergonomic Assessments

The Contractor shall be paid a firm unit rate (flat rate) per Individual Office Ergonomic Assessment. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Individual Office Ergonomic Assessment (1 employee) (A)	Firm unit rate per Individual Office Ergonomic Assessment of two (2) or more employees on the same day at the same CRA site (B)	No-show or cancellation with less than 24 hours notice (C)
Atlantic	Each	\$	\$	\$
National Capital	Each	\$	\$	\$
Ontario	Each	\$	\$	\$
Québec	Each	\$	\$	\$
Pacific	Each	\$	\$	\$
Prairies	Each	\$	\$	\$
TOTALS		\$	\$	\$

Individual Office Ergonomic Assessment Bid Price Option Year 3 (EA OYR3) = Total (A) + Total (B) + Total (C)

Individual Office Ergonomic Follow Up Assessments

The Contractor shall be paid a firm unit rate (flat rate) per Individual Office Ergonomic Follow-up Assessment. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Individual Office Ergonomic Follow-Up Assessment (1 employee) (A)	Firm unit rate per Individual Office Ergonomic Follow-up Assessment of two (2) or more employees on the same day at the same CRA site. (B)	No-show or cancellation with less than 24 hours notice (C)
Atlantic	Each	\$	\$	\$
National Capital	Each	\$	\$	\$
Ontario	Each	\$	\$	\$
Québec	Each	\$	\$	\$
Pacific	Each	\$	\$	\$
Prairies	Each	\$	\$	\$
TOTALS		\$	\$	\$

Individual Office Ergonomic Follow-up Assessment Bid Price Option Year 3 (EFA OYR3) = Total (A) + Total (B) + Total (C)



Ergonomic Assessment of employees' residential workstations;

The Contractor shall be paid a firm unit rate (flat rate) per Ergonomic Assessment of an employee's residential workstations. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Ergonomic Assessment of an employee's residential (A)	No-show or cancellation with less than 24 hours notice (B)
Atlantic	Each	\$	\$
National Capital	Each	\$	\$
Ontario	Each	\$	\$
Québec	Each	\$	\$
Pacific	Each	\$	\$
Prairies	Each	\$	\$
TOTALS		\$	\$

Individual Ergonomic Assessment of employees' residential workstations Bid Price Option Year 3 (EARW OYR3) = Total (A) + Total (B)

Training and Awareness Sessions

The Contractor shall be paid a firm hourly rate for delivering local training and awareness sessions.

Region	Unit of Issue	Firm hourly rate for delivering local training and awareness sessions (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$
TOTALS		\$

Training and Awareness Sessions Bid Price Option Year 3 (TAS OYR3) = Total (A)

Industrial Ergonomic Assessments

The Contractor shall be paid a firm hourly rate for delivering Industrial Ergonomic Assessments.

Region	Unit of Issue	Firm hourly rate for delivering Industrial Ergonomic Assessments (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$
TOTALS		\$

Industrial Ergonomic Assessments Bid Price Option Year 3 (IEA OYR3) = Total (A)



Ergonomic Subject Matter Expertise

The Contractor shall be paid a firm hourly rate for providing Ergonomic Subject Matter Expertise.

Region	Unit of Issue	Firm hourly rate for delivering Ergonomic Subject Matter Expertise (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$
TOTALS		\$

Ergonomic Subject Matter Expertise Bid Price Option Year 3 (ESME OYR3) = Total (A)

BID EVALUATION PRICE OPTION YEAR 3 =

(EA OYR3) + (EFA OYR3) + (EARW OYR3) + (TAS OYR3) + (IEA OYR3) + (ESME OYR3)

The final bid evaluation price will be derived by:

**(BID EVALUATION PRICE CONTRACT YEAR 1) +
(BID EVALUATION PRICE CONTRACT YEAR 2) +
(BID EVALUATION PRICE OPTION YEAR 1) +
(BID EVALUATION PRICE OPTION YEAR 2) +
(BID EVALUATION PRICE OPTION YEAR 3)**

Goods and Services Tax or Harmonized Sales Tax as applicable, is extra to the "Total Estimated Cost" shown herein and shall be paid in accordance with the provisions of the General Conditions.

A day is defined as 7.5 hours exclusive of meal breaks. A Work Week is defined as Monday to Friday inclusive, excluding Saturday and Sunday. Payment shall be for days actually worked with no provision for overtime rate, annual leave, local, provincial and national statutory holidays and sick leave. Time worked which is more or less than a day shall be prorated to reflect actual time worked.

All payments are subject to Government audit.



ATTACHMENT 4: CERTIFICATIONS REQUIRED TO BE SUBMITTED AT TIME OF BID CLOSING

Bidders must submit the following duly completed certifications as part of their bid at bid closing. All certifications must be completed accurately. The complete legal name of the bidder must be provided on all required certifications and must match the legal name provided on the front page of the RFP.

The Bidder should ensure they review and understand the certifications below. The Bidder should contact the Contracting Authority if they require further clarification on these certifications.

Please ensure all the required signatures are provided at bid closing, as indicated below.

4.1 TERMS AND CONDITIONS

The Bidder hereby certifies compliance with and acceptance of all of the articles, clauses, terms and conditions contained or referenced in this Request for Proposal (RFP) and Statement of Work (SOW). Any modifications, or conditional pricing by the bidder, including deletions or additions to the articles, clauses, terms and conditions contained or referenced in this RFP and/or SOW document will render the bid non-responsive.

4.2 STATUS AND AVAILABILITY OF RESOURCES

The Bidder certifies that, should it be awarded a contract as a result of the solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting 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 Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder 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 Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

4.3 EDUCATION AND EXPERIENCE

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

4.4 LANGUAGE CAPABILITY

The Bidder hereby certifies that the proposed resource(s) meet(s) the language requirements as specified in the SOW.



4.5 CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid or tender (hereinafter "bid") to:

Canada Revenue Agency

(Corporate Name of Recipient of this Submission)

for:

Ergonomic Services, RFP 1000320941

(Name of Project and Solicitation Number)

in response to the call or request (hereinafter "call") for bids made by:

Canada Revenue Agency

(Name of Tendering Authority)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: _____

(Corporate Legal Name of Bidder or Tenderer [hereinafter "Bidder"])

that:

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the Bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the Bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the Bidder to determine the terms of, and to sign, the bid, on behalf of the Bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the Bidder, whether or not affiliated with the Bidder, who:
 - (a) has been requested to submit a bid in response to this call for bids;
 - (b) could potentially submit a bid in response to this call for bids, based on their qualifications, abilities or experience;
6. The Bidder discloses that **(check one of the following, as applicable):**
 - (a) the Bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with, any competitor;
 - (b) the Bidder has entered into consultations, communications, agreements or arrangements with one or more competitors regarding this call for bids, and the Bidder discloses, in the attached document(s), complete details thereof, including the names of the competitors and the nature of, and reasons for, such consultations, communications, agreements or arrangements;



7. In particular, without limiting the generality of paragraphs (6)(a) or (6)(b) above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
- (a) prices;
 - (b) methods, factors or formulas used to calculate prices;
 - (c) the intention or decision to submit, or not to submit, a bid; or
 - (d) the submission of a bid which does not meet the specifications of the call for bids;
- except as specifically disclosed pursuant to paragraph (6)(b) above;
8. In addition, there has been no consultation, communication, agreement or arrangement with any competitor regarding the quality, quantity, specifications or delivery particulars of the products or services to which this call for bids relates, except as specifically authorized by the Tendering Authority or as specifically disclosed pursuant to paragraph (6)(b) above;
9. The terms of the accompanying bid have not been, and will not be, knowingly disclosed by the Bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening, or of the awarding of the contract, whichever comes first, unless otherwise required by law or as specifically disclosed pursuant to paragraph (6)(b) above.

(Printed Name and Signature of Duly Authorized Agent of Bidder)

(Position Title)

(Date)



4.6 JOINT VENTURE CERTIFICATION

NOTE TO BIDDER: Complete this certification if a joint venture is being proposed otherwise check the box below.

[] This certification is not applicable.

The Bidder represents and warrants the following:

- (a) The bidding entity is a contractual joint venture in accordance with the following definition. A "contractual joint venture" is an association of two or more parties who have entered into a written contract in which they have set out the terms under which they have agreed to combine their money, property, knowledge, skills, time or other resources in a joint business enterprise, sharing the profits and the losses and each having some degree of control over the enterprise.
(b) The name of the joint venture is: _____(if applicable).
(c) The members of the contractual joint venture are (the Bidder is to add lines to accommodate the names of all members of the joint venture, as necessary):
(d) The Business Numbers (BN) of each member of the contractual joint venture are as follows (the Bidder is to add lines for additional BNs, as necessary):
(e) The effective date of formation of the joint venture is: _____
(f) Each member of the joint venture has appointed and granted full authority to _____ (the "Lead Member") to act on behalf of all members as its representative for the purposes of executing documentation relating to the Contract issued subsequent to contract award, including but not limited to Contract Amendments and Task Authorizations.
(g) The joint venture is in effect as of the date of bid submission.

This Joint Venture Certification must be signed by EACH member of the joint venture.

The Joint Venture Certification shall be effective throughout the entire period of the Contract, including any exercised option period, if exercised.

The CRA has the right to request documentation from the Bidder evidencing the existence of the contractual joint venture.

Signature of an authorized representative of each member of the joint venture (the Bidder is to add signatory lines as necessary):

Signature of Duly Authorized Representative Name of Individual (Please Print) Legal Name of Business Entity Date

Signature of Duly Authorized Representative Name of Individual (Please Print) Legal Name of Business Entity Date



ATTACHMENT 5: CERTIFICATIONS REQUIRED TO BE SUBMITTED PRIOR TO CONTRACT AWARD

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

5.1 INTEGRITY PROVISIONS – ASSOCIATED INFORMATION

By submitting a bid, the Bidder certifies that the Bidder and its Affiliates are in compliance with the provisions as stated in Section 01 Integrity Provisions - Bid of Standard Instructions 2003. The associated information required within the Integrity Provisions will assist Canada in confirming that the certifications are true.

5.2 FORMER PUBLIC SERVANT CERTIFICATION

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

Definitions:

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

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

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

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

Former Public Servant in Receipt of a Pension

Are you, the Bidder, a FPS? **YES** () **NO** ()

Are you, the Bidder, a FPS in receipt of a pension as defined herein? **YES** () **NO** ()

If "yes", please identify in what capacity you, the Bidder, are bidding by ticking the appropriate box below:

- an individual?
- an individual who has incorporated?



- a partnership made of former public servants?
- a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity?

Please provide the following additional information:

- (i) name(s) of the former public servant(s);
- (ii) date(s) of termination of employment or retirement from the Public Service; and
- (iii) for each former public servant named in (i) above, provide the applicable pension act(s) and any post employment constraints or restrictions if applicable.

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, under the PSSA, will be reported on the CRA website as part of the published proactive disclosure reports for contracts.

Work Force Adjustment Directive

Are you, the Bidder, a FPS who received a lump sum payment pursuant to the terms of a work force adjustment directive?

YES () **NO** ()

If "yes", please provide, for each FPS named in (i) above, the following information:

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

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 Applicable Taxes.

Certification

The Bidder certifies that the information submitted by the Bidder in response to the above requirements is accurate and complete.

Signature of authorized Bidder representative: _____



5.3 FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY – CERTIFICATION

FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY – BID CERTIFICATION

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "[FCP Limited Eligibility to Bid](http://www.labour.gc.ca/eng/standards_equality/eq/emp/fcp/list/inelig.shtml)" list (http://www.labour.gc.ca/eng/standards_equality/eq/emp/fcp/list/inelig.shtml) available from [Employment and Social Development Canada \(ESDC\) - Labour's website](#)

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

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](#)" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed [Federal Contractors Program for Employment Equity - Certification \(Attachment 5\)](#), before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY – CERTIFICATION

I, the Bidder, by submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated below. The certifications provided to Canada are subject to verification at all times. I understand that Canada will declare a bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with any request or requirement imposed by Canada may render the bid non-responsive or constitute a default under the Contract.

For further information on the Federal Contractors Program for Employment Equity visit [Employment and Social Development Canada \(ESDC\)-Labour's website](#).

Date: _____(YYYY/MM/DD) (If left blank, the date will be deemed to be the bid solicitation closing date.)

Complete both A and B.

A. Check only one of the following:

A1. The Bidder certifies having no work force in Canada.

A2. The Bidder certifies being a public sector employer.

A3. The Bidder certifies being a federally regulated employer being subject to the Employment Equity Act.

A4. The Bidder certifies having a combined work force in Canada of less than 100 employees (combined work force includes: permanent full-time, permanent part-time and temporary employees [temporary employees only includes those who have worked 12 weeks or more during a calendar year and who are not full-time students]).

A5. The Bidder has a combined workforce in Canada of 100 or more employees; and



() A5.1. The Bidder certifies already having a valid and current Agreement to Implement Employment Equity (AIEE) in place with ESDC- Labour.

OR

() A5.2. The Bidder certifies having submitted the Agreement to Implement Employment Equity (LAB1168) to HRSDC-Labour. As this is a condition to contract award, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC- Labour.

B. Check only one of the following:

() B1. The Bidder is not a Joint Venture.

OR

() B2. The Bidder is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification. (Refer to the Joint Venture section of the Standard Instructions)

5.4 VENDOR REPORTING INFORMATION

The following information should be provided to enable CRA compliance with paragraph 221(1)(d) of the Income Tax Act, R.S.C. 1985, c.1 (5th Supp.) and report payments made to contractors under applicable services contracts (including contracts involving a mix of goods and services) on a T1204 Government Service Contract Payments slip.

For the purpose of this clause:

“Legal Name” means the name of the company, corporation or other entity constituted as a legal person under which this person exercises its rights and performs its obligations.

“Operating Name” means the name that is legally protected and used in the course of its business by a company, corporation or other entity legally constituted as a legal person, or by the individual.

The Bidder is requested to provide the following:

Legal Name: _____

Operating Name: _____

Address: _____

Payment/T1204 Address (if different) Payment address is same as above



City: _____

Province: _____

Postal Code: _____

Telephone: _____

Fax: _____

Type of Business (Select only one)

Corporation Partnership Sole Proprietor Non-Profit Organization US or International Co.

All registered companies (excluding Non-Profit organizations and US or International companies) must provide their Goods and Services Tax (GST) or Business Number (BN). Additional details on how to obtain a BN can be found at: <http://www.cra-arc.gc.ca/tx/bsnss/tpcs/bn-ne/menu-eng.html>

If the services will be rendered by an individual, please provide the Social Insurance Number (SIN).

Goods and Services Tax (GST) Number: _____

Business Number (BN): _____

Social Insurance Number (SIN): _____
If a SIN number is being provided, the information should be placed in a sealed envelope marked "Protected".

N/A Reason: _____

Note: If you select "N/A", then you must give a reason.

Date: _____

Name: _____

Signature: _____
(Signature of duly authorized representative of business)

Title: _____
(Title of duly authorized representative of business)

5.5 SYNERGY REQUIREMENTS

Prior to Contract Award, the Bidder must provide:

- a) Ariba Supplier Network (ASN) Account number: _____
(refer to <http://supplier.ariba.com> for more information)



- b) The name, title, email address, location and toll-free telephone number of a technical resource who will be responsible for working with the CRA Synergy Vendor Enablement Coordinator (CRA SVEC) throughout the Proof of Synergy Compliance Testing (PoSC).

Technical Resource Name: _____

Title: _____

Location (city, province): _____

Email address: _____

Toll-free Telephone number _____



ANNEX A: STATEMENT OF WORK

1.0 TITLE

Provision of ergonomic services to the Canada Revenue Agency

2.0 OBJECTIVE

The Canada Revenue Agency (CRA) requires the services of an external Contractor to provide office and industrial ergonomic assessments; to train employees on basic ergonomic principles; and to provide ergonomic subject matter expertise as needed.

3.0 BACKGROUND

The CRA is a federal government agency employing approximately 42,000 employees in 108 facilities located in 59 towns and cities in six regions across Canada.

In adherence to the *Canada Labour Code (CLC)*, Part II, the CRA must ensure the health and safety of its employees by preventing accidents and injury to health arising out of, linked with or occurring in the course of employment. This includes ensuring that the work place, work spaces and procedures meet prescribed ergonomic standards as per the *CLC*, Part II Section 125.(1) (t) and (u).

The goal of the CRA Occupational Health and Safety (OHS) Program is to reduce the incidence of occupational injuries and illness through prevention initiatives, which includes an Ergonomic Strategy. The objective of the Ergonomic Strategy is to reduce the incidence of musculoskeletal symptoms and/or disorders in the office work environment through a consistently applied educational program on the basic principles of office ergonomics.

The strategy follows a tiered approach for work station ergonomics:

1. CRA employees do their own self-adjustment of their work stations.
2. CRA ergonomic coaches assist employees with adjustments to their work stations.
3. External qualified health practitioners complete complex ergonomic assessments.

4.0 SCOPE

The CRA requires the services of an external Contractor to provide ergonomic assessments; standardized ergonomic training and awareness sessions to CRA ergonomic coaches and employees; and to complete complex ergonomic assessments in office and industrial settings. In addition, the Contractor must provide ergonomic expertise and guidance on ergonomic matters in areas such as, the procurement and use of furniture and equipment.

The Contractor must provide ergonomic services on an “as and when requested” basis.

The services must include:

- a. individual **office ergonomic assessments**;
- b. individual **follow-up office ergonomic assessments**;
- c. **office ergonomic assessment of employees’ residential workstations**;
- d. **training and awareness sessions** that include:
 - o the delivery of CRA customized training courses;
 - o the delivery of commercial off-the-shelf (COTS) or Contractor developed/CRA approved sessions, with the objective of preventing work place hazards, for example a safe lifting course.
- e. **industrial ergonomic assessments** that include:



- individual ergonomic assessments in industrial environments;
 - group ergonomic assessments in industrial environments.
- f. **ergonomic subject matter expertise** such as, but not limited to:
- product evaluation for procurement purposes;
 - ergonomic design review;
 - tool and equipment selection recommendations;
 - industrial seating assessments;
 - development of new standardized CRA customized training and awareness courses in conjunction with the CRA's National OHS representatives.

The Contractor must provide:

- a. A Dedicated Administrator to manage the Ergonomic Services Contract and a structured Quality Assurance (QA) Program. The Dedicated Administrator must ensure that professional ergonomic services are provided according to the provisions of this statement of work and must also submit accurate, timely, and complete reports as outlined under paragraph 6.4 below.
- b. The structured Quality Assurance (QA) Program must include, at a minimum, a two-tier review process, with Tier One reviews completed by QA agents provided by the Contractor, and all Tier Two reviews must be completed by an accredited Ergonomist. The goal of the QA Program is to ensure that all deliverables adhere to the established CRA Quality Review Criteria Checklists (Appendix D: Quality Review Criteria Checklists) and proactively report issues to the Project Authority, including non-conformances to contract terms and conditions as well as any processes established by the parties for control purposes. This will ensure quality services and deliverables, while allowing for continuous improvements, throughout the life of the contract.

5.0 DEFINITIONS

CRA Requesting Office: The local CRA office from which the ergonomic service request (Service Request) originates.

CRA Requesting Officer: A CRA representative who acts on behalf of the CRA for all matters related to the Service Request submitted. A Manager or a Management Representative will serve the role of a CRA Requesting Officer.

Ergonomic Assessment Consent Form: A confidential form signed by a CRA employee before undergoing an ergonomic assessment that provides consent to release information to the employer representative(s) regarding the employee's assigned job duties.

Ergonomic hazards: Refers to workplace conditions that pose a risk of injury to the musculoskeletal system of the employee. Ergonomic hazards are associated with the way work is designed and the way it is performed. Examples would include but are not limited to:

- awkward postures;
- working in the same position for a long time;
- strenuous activity such as lifting or carrying heavy objects; and
- repetitive tasks performed for long periods of time.

Ergonomic office supplies or equipment: Items used in the work environment, and can include mice, keyboards, document holders, footrests, headsets, and chair.



Industrial ergonomic assessment: Refers to assessment of the level of risk for musculoskeletal injury of CRA employees who perform specific tasks (e.g., manual material handling when assigned to workstations located in an industrial environment).

Office ergonomic assessment: A professional assessment of an employee's office workstation that is performed by a health practitioner to improve comfort and safety. The ergonomic assessment will address the employee's ergonomic needs which may include functional abilities and limitations, symptoms, personal characteristics, identifying and assessing ergonomic hazards, tasks or risk factors that may impact the employee's workstation ergonomics.

Service Request: When the CRA requires a service, a Service Request (SR) will be issued to instruct and authorize the Contractor to carry out the specified work in accordance with the terms and conditions of the Contract. The Contractor's obligation to perform the work under the Contract will come into force to the extent designated in each Service Request.

Training and awareness sessions: Refers to hourly, half day or full day training workshops on ergonomic hazard prevention. Workshops may include, but are not limited to: classroom training, with follow-up, one-on-one coaching; classroom training on hazard prevention such as safe lifting and carrying techniques, with practice application of techniques; or classroom training for ergonomic coaches.

6.0 TASKS

The Contractor must deliver ergonomic services as follows:

6.1 Ordering Process

Individual requirements for ergonomic services will be requested from the Contractor through the CRA's e-commerce solution – Synergy Catalogue Order.

The Contractor must perform all work under a Service Request on, or before, the expiry date of the contract, and in accordance with the Services Standards outlined in Appendix C - Service Standards. Industrial ergonomic and other ergonomic services will require prior approval by the Project Authority before work proceeds.

The Contractor must have centralized intake point(s) for the purposes of accepting and processing a CRA Service Request and for addressing inquiries submitted from CRA Requesting Offices in both Official Languages. The centralized intake point(s) must be equipped with toll-free number, an email address and a secure fax number in order to accept inquiries from CRA Requesting Offices between the hours of 8:00 a.m. – 5:00 p.m. (local time), Monday to Friday, excluding statutory holidays.

Detailed information on both the Synergy Catalogue Order method and the External Purchase method will be identified under Appendix E; to the contract titled, 'Requirements for CRA –Synergy Solution.

The Contractor must acknowledge the Service Request, with the CRA Requesting Officer.

6.2 Service Delivery

The Contractor must provide the following services on an "as-and-when requested" basis, in compliance with the prescribed timelines outlined in Appendix C - Services Standards.

All services and deliverables must be provided to the CRA in accordance with the timelines specified in Section 7.0 Deliverables and Acceptance Criteria below.

a. Individual Office Ergonomic Assessments:

- contact the employee being assessed to schedule an appointment during employee's working hours;
- confirm appointment details with the employee via email including cancellation policy, copying the manager;
- contact the manager, via email, prior to the assessment to describe the assessment process and inform them of the opportunity to meet following the assessment;



- before beginning the assessment, the Contractor must have the CRA employee sign the Office Ergonomic Assessment Consent Form (Appendix E);
- conduct an office ergonomic assessment for the identified employee at the CRA work site specified in the Service Request;
- educate the employee during the assessment process regarding workstation adjustments, posture, exercises, and other useful tools and information, to prevent, eliminate, or reduce risks of injury;
- meet with the employee's manager immediately following the assessment to debrief him/her on key findings, or if the manager is not available, provide the information via telephone or email within 24 hours after the assessment has been completed;
- inform the Project Authority before submitting recommendations that could be considered non-standard; and
- submit to the manager, an Office Ergonomic Assessment Report in accordance with the outline provided in Appendix A – Outline for an Office Ergonomic Assessment Report. Revisions to the report may be required during the life of the Contract and will be provided to the Contractor via the Contracting Authority, following the CRA Project Authority's approval. The revised report must be implemented by the Contractor immediately upon receipt.

b. Individual Follow-up Office Ergonomic Assessments:

- The Contractor will schedule a follow-up office ergonomic assessment appointment, only if:
 - the employee's manager requests the follow-up
 - the appointment would be within 12 months of the initial assessment
 - it is at the same workstation as the initial assessment
- follow the same process as for the initial assessment, listed above; and
- submit a report in accordance with the content requirements listed in Appendix B - Outline for the Follow-Up Office Ergonomic Assessment Report. Revisions to this report may be required during the life of the Contract and will be provided to the Contractor via the Contracting Authority, following the CRA Project Authority's approval. The revised report must be implemented by the Contractor immediately upon receipt.

c. Office Ergonomic Assessment of Employees' Residential Workstations

The description of the service requirements are outlined Section 6.2 (a) Individual Office Ergonomic Assessments.

d. Training and awareness sessions:

- contact the CRA Requesting Officer to confirm the type of training required, the preferred language, number of participants, time and location, and any other needs related to the training or awareness session;
- conduct training or awareness session using the CRA approved materials, at the requested location;
- answer ergonomic questions throughout the session by acting as a resource to the participants; and
- demonstrate ergonomic skills or techniques, observe employees performing the task, and provide feedback as necessary.

e. Industrial Ergonomics Assessments:

- contact the CRA Requesting Officer to obtain the scope of work or outline, which has been approved by the Project Authority that will include the requirements and details regarding the equipment and/or product evaluation, industrial environment, design criteria, and task analysis;
- contact the CRA Requesting Officer for clarification or additional information, if necessary;



- submit a proposal for the work to be undertaken including timelines, tasks, deliverables and estimated costs to the Project Authority, and copying the CRA Requesting Officer;
- obtain written approval from the Project Authority prior to providing the required service(s);
- deliver the service(s) in accordance with the approved scope of work;
- debrief the CRA Project Authority and Requesting Officer if requested; and
- submit a draft report containing ergonomic recommendations to the Project Authority, and copy the CRA Requesting Officer. Once approved, the report will be considered final.

f. Ergonomic Subject Matter Expertise:

- review the scope of work, submitted by the Project Authority;
- obtain clarification or additional information from the Project Authority, if necessary;
- submit a proposal for the work to be undertaken including timelines, description of tasks, deliverables and costs;
- obtain written approval from the Project Authority prior to providing the required service(s);
- deliver the service(s) in accordance with the approved scope of work;
- debrief the Project Authority on the report recommendations; and
- submit a draft report based on the requirements outlined in the scope of work, for approval by the Project Authority. Once approved, the report will be considered final.

6.3 Administration and Quality Assurance

The Contractor must:

- provide a Dedicated Administrator for managing the Contractor's ergonomic services, identifying issues, and providing clarification when requested;
- respond to all inquiries from the Project Authority and ensure the central intake point responds to managers' inquiries;
- use the approved CRA ergonomic tools and validate on a quarterly basis that the appropriate tools are being utilized (new or improved tools);
- ensure quality of all services delivered by implementing and monitoring a structured Quality Assurance Program, which will include but is not limited to:
 - a quality control review of every Office Ergonomic Assessment Report and Follow-Up Office Ergonomic Report using the criteria found in the CRA Quality Review Criteria Checklists (Appendix D);
 - a quality control of training including verifying that the materials (developed or off-the-shelf) are the latest approved versions,
 - administering course evaluations with components on course materials and instructor; and
 - a quality control review of all other ergonomic services and reports.

The Administrator will also work with the Project Authority to develop a complaint resolution process.

6.4 Statistical Reporting Requirements

The Contractor must provide:

- a. monthly tracking reports of all services provided by e-mail to the Project Authority. These reports must include, but not be limited to the following information:
 - Service request number



- o Type of ergonomic service
 - o Date the service was requested
 - o Date the service was delivered
 - o Date the service request was closed
 - o Date the service was billed
 - o Cost of service provided
 - o Date quality assurance of service was performed
 - o Quality assurance issues/problems summary and corrective action taken
- b. quarterly reports including:
- o summary of quality assurance issues that were identified;
 - o trend analysis of services rendered;
 - o percentage of service standards (Section 7.0: Deliverables and Acceptance Criteria) that were met and an explanation as to why standards were not met, including the root cause analysis and corrective action plan; and
 - o identification of process improvements when required.
- c. annual report including:
- o statistics on services rendered;
 - o summary of quality assurance process; and
 - o trend analysis and recommendations of improvements to service process if any.

6.5 Communications

The Contractor must meet with the Project Authority, either in person, or via videoconference or teleconference, at no additional cost to the CRA as follows:

- within 15 business days of contract award, as an orientation meeting;
- monthly for the first six months of the Contract, or more frequently if deemed necessary by the Project Authority; and
- on a quarterly basis to review applicable reports (Section 6.4).

Communicate with the Project Authority on any issues, problems or areas of concern related to any of the ergonomic services. The communication may be in the form of telephone calls, e-mail updates, or meetings.

7.0 DELIVERABLES AND ACCEPTANCE CRITERIA

The Contractor will:

- submit an Office Ergonomic Assessment Report or a Follow-Up Office Ergonomic Assessment Report when the requested service is provided. The Report must at a minimum, contain the information found in Appendix A - Outline for an Office Ergonomic Assessment Report and Appendix B - Outline for a Follow-Up Office Ergonomic Assessment Report as applicable. These reports must meet the requirements outlined in the CRA Quality Review Criteria Checklists, (Appendix D), to assist the manager in maximizing workstation set-up for comfort and efficiency, provide specifications for ergonomic equipment along with suggested types/models of equipment, in accordance with CRA's procurement process;
- provide the employee receiving the ergonomic assessment, a minimum notice of one (1) working day for a change in the date of the ergonomic appointment;



- deliver ergonomic training courses on-site, in either a one-day or a half-day session. One-day courses will be 7.5 hours of instruction time, including two fifteen minute breaks and half hour lunch break. Half-day courses will be 3.75 hours, including one 15 minute break. Training sessions must be delivered anytime between the hours of 8:00 a.m. and 5:00 p.m.
- For ergonomic training sessions provide the CRA Requesting Officer with a minimum notice of three (3) work days, for a change in date of training;
- provide quality reviewed reports for industrial ergonomic assessments and other ergonomic services as defined in the Service Request scope of work or outline, provided by the CRA Requesting Officer, with the approval of the Project Authority;
- ensure that personal employee or protected CRA information is kept confidential in keeping with CRA security and privacy policies and guidelines, and related legislation; and
- provide services in accordance with the timelines outlined in Appendix C – Service Standards.

8.0 LANGUAGE REQUIREMENTS

The Contractor shall meet the obligations under the Official Languages Act (<http://laws.justice.gc.ca/en/O-3.01/index.html>) and ensure that all ergonomic and administrative (intake) services are provided based on the linguistic designation of the CRA Requesting Office. The linguistic requirements for the individual CRA Requesting Offices are listed in Appendix F - List of CRA Locations. However, if the language preference for the service requested differs from the stated requirement in Appendix F– List of CRA Locations, the Contractor must make the necessary arrangements to provide the services, notify the Project Authority, and the CRA Requesting Officer.

All reports for Office Ergonomic Assessments and Follow-Up Office Ergonomic Assessments must be produced in one of the Official Languages, English or French, as per the choice of the CRA Requesting Officer.

Education sessions must be in the Official Language of choice (one of the official languages, French or English) and this will be confirmed in the service request. The Contractor's instructors must be proficient in the target language of the specific course they are teaching.

All training and awareness materials, provided by the Contractor, must be provided in English and French. The translation will be submitted separately and not in a bilingual format.

The monthly, quarterly and annual summary reports must be produced in English.

All industrial ergonomic assessments and ergonomic subject matter expertise services will be delivered in the language of choice indicated in the Service Request.

9.0 TRAVEL

The Contractor will be responsible for all travel expenditures. This includes providing their own transportation to the CRA location, as listed in Appendix F - List of CRA locations, to perform all ergonomic services. This would also include office ergonomic assessments of residential workstations for employees, who work within a two-hour driving radius from a CRA work site.

10.0 EQUIPMENT AND TOOLS

The Contractor must use their own equipment and tools for the completion of ergonomic services at no additional cost to the CRA.

The Contractor will be responsible for providing the equipment and tools to gather the necessary data during the data collection phase of an industrial ergonomic assessment, such as when the Contractor may be required to objectively quantify the weight of objects, the push/pull forces, the dimensions of a workstation, the reach envelopes, the awkward body postures and the frequency of tasks.



The Contractor will be responsible for providing the equipment and tools to complete the necessary analysis during the analysis phase of an industrial ergonomic assessment such as when the Contractor may be required to refer to validated industrial standards, such as, but not limited to, NIOSH, Snook, RULA, 3D Static Strength, to evaluate the risk of musculoskeletal injury.

If the CRA Project Authority requests a whole body or hand arm vibration assessment, the CRA will cover the actual rental cost of vibration testing equipment. This rental cost must be approved by the Project Authority prior to the rental of the equipment.

11.0 TRANSFER OF CRA EMPLOYEE PERSONAL INFORMATION

The Contractor must obtain the employee's written consent before a copy of the Office Ergonomic Assessment Report or any other report that deals with an employee's personal information can be provided to the CRA. Employees' must provide their consent by completing and signing the Office Ergonomic Assessment Consent Form attached as Appendix E.

12.0 RECORD CONTENT, MANAGEMENT, RETENTION, AUDIT AND DISPOSAL

The Contractor must keep all records, such as, but not limited to, reports, monitoring, statistics, and training, for five (5) years after the contract expiry date.

All personal information collected under the Contract is deemed to be under the control of the Agency and is consequently subject to the Privacy Act and the Canada Revenue Agency's Security policy which can be viewed on the Canada Revenue Agency Internet site: <http://www.cra-arc.gc.ca/gncy/prcrmnt/sctyrqrmnts-eng.html>.

13.0 CONTRACTOR QUALIFICATIONS

The Contractor must ensure that all health practitioners are in good standing with the applicable provincial and federal associations or licensing bodies; demonstrate and maintain clinical competence in their area of practice; and carry malpractice or liability insurance commensurate with practice norms. The Contractor must ensure that all health practitioners utilized by the Contractor are not under investigation and do not have a criminal record. The Contractor is responsible for conducting credential verifications on all health practitioners.

The Contractor is responsible for all costs resulting from a situation where a health practitioner must be replaced because that individual no longer meets the minimum qualifications nor has a required license revoked for any reason whatsoever. The CRA will not be responsible for any costs associated with licensing, insurance, continuing professional education, and credentialing.

At the time of the ergonomic service, the Contractor must ensure those providing the service meet the following minimum mandatory qualifications:

1. Health Practitioners conducting office ergonomic assessments:
 - must be an accredited kinesiologist, physiotherapist, occupational therapist, ergonomist, or occupational health nurse; and
 - must have conducted a minimum of 25 office ergonomic assessments within the last two (2) years to clients.
2. Health Practitioners delivering training must:
 - must be an accredited kinesiologist, physiotherapist, occupational therapist, ergonomist, or occupational health nurse;
 - have conducted a minimum of 25 office ergonomic assessments within the last three (3) years to clients; and



- have a minimum one year of experience facilitating training.
3. Health Practitioners providing an industrial assessment or ergonomic subject matter expertise must:
- be an accredited Ergonomist - Canadian Certified Professional Ergonomist or have a Certified Professional Ergonomist designation;
 - have conducted a minimum of 10 non-office environment assessments (e.g. industrial) within the last two (2) years to clients;
 - have conducted 25 or more office ergonomic assessments within the last two (2) years to clients.

The Contractor must provide a sufficient number of health practitioners to provide office ergonomic assessments and training to CRA employees across Canada, for the duration of the contract to meet the service standards as indicated in Appendix C - Service Standards. As a minimum, the Contractor must provide health practitioners to complete office ergonomic assessments at each CRA work site listed in Appendix F - List of CRA Locations.

The Contractor must provide a health practitioner to complete industrial assessments or ergonomic subject matter expertise, in the specified locations listed in Appendix F - List of CRA Locations.

14.0 CLIENT SUPPORT

The CRA will provide:

- space for the Contractor to deliver training;
- a maximum of twenty employees for each on-site training or awareness session;
- electronic copies of its ergonomic instruments, as well as strategy, procedure, coach checklist, and training;
- timely updates to its ergonomic instruments;
- a lexicon of terms for use in translation, if required;
- employees' job descriptions where appropriate, to provide context in term of the employees' essential duties, standards and functions;
- a scope of work for industrial assessments and ergonomic subject matter expertise services;
- minimum notice of one working day for a change in date or cancellation of an ergonomic assessment, and three working days for a change in a training session;
- approval of all CRA training courses and Contractor "off-the-shelf" training or awareness materials; and
- updated report outlines (e.g. Appendix A and B) within one (1) working day of CRA Project Authority approval.

The CRA Project Authority will be available within two (2) working days to meet (teleconference or in person) the Contractor to resolve any arising problems or issues.

15.0 APPENDIXES

Appendix A: Outline for an Office Ergonomic Assessment Report

Appendix B: Outline for a Follow-Up Office Ergonomic Assessment Report

Appendix C: Service Standards

Appendix D: Quality Review Criteria Checklists

Appendix E: Office Ergonomic Assessment Consent Form

Appendix F: List of CRA locations



APPENDIX A

OUTLINE FOR AN OFFICE ERGONOMIC ASSESSMENT REPORT

Service Request – Confirmation Number

Employee Name

Work Location

Assessment Date

Assessor Name, Credentials, and Designation

INTRODUCTION

An explanation of what is involved in an ergonomic assessment, the purpose, and the expected outcome. As well, it must be confirmed that the employee has provided written consent to provide a copy of this report to the Canada Revenue Agency.

BACKGROUND

Location of Symptoms

- Trunk
- Head
- Lower Extremity
- Upper Extremity

ASSESSMENT

The assessment section incorporates identification of distinct postures that are considered as non optimal, and may lead to an increased risk of injury.

POSTURE

The following postures were observed and relate to the location of symptoms identified:

- Trunk
- Head
- Lower Extremity
- Upper Extremity

ERGONOMIC ISSUES AND ANALYSIS

The workstation and the job processes/elements as listed:

Chair Set-up; Foot Rest; Desk Height; Desk Organization; Keyboard Set-up; Mouse Set-up, Monitor Set-up, Telephone; Lighting; and Laptop Set-up.

RECOMMENDATIONS

EDUCATIONAL COMPONENTS

Signature of Assessor, Employer Representative, and Employee



APPENDIX B

OUTLINE FOR THE FOLLOW-UP OFFICE ERGONOMIC ASSESSMENT REPORT

(Addendum to the original Office Ergonomic Assessment Report)

Service Request – Confirmation Number
Employee Name
Work Location
Assessment Date
Assessor Name, Credentials, and Designation

INTRODUCTION

An explanation of what is involved in a Follow-Up Ergonomic Assessment, the purpose, and the expected outcome. As well, it must be confirmed that the employee has provided written consent, to provide a copy of this report to the Canada Revenue Agency.

OBSERVATIONS

RECOMMENDATIONS

Signature of Assessor, Employer Representative, and Employee



APPENDIX C: SERVICE STANDARDS

Type of Service	Acknowledge request for service	Schedule ergonomic service	Deliver service / submit written report	Invoice the service
Ergonomic Assessment (Office)	Within 1 working day of request for service	Within 3 working days of request for service.	Within 15 working days of request for service.	When the report is submitted and accepted by the CRA.
Ergonomic Assessment (Industrial)	Within 1 working day of request for service	Within 5 working days of request for service.	Timeline will be based on the scope of work or outline.	When the report is submitted and accepted by the CRA.
Standardized Ergonomic Training	Within 1 working day of request for service	Within 5 working days of request for service.	Within 15 working days of request for service.	Within 2 days of the delivery of service.
Other Ergonomic Services	Within 1 working day of request for service	Within 5 working days of request for service.	Timeline will be based on the scope of work or outline.	When the report is submitted and accepted by the CRA.
Monthly tracking reports	n/a	n/a	Within 10 working days following the end of the month.	n/a
Annual and quarterly reports (April to March)	n/a	n/a	Within 15 working days following the end of the quarter.	n/a

Additional Information

1. The above timelines would be accelerated for 'Urgent Requests' based on consultations with the Contractor, and subject to the approval of the CRA Requesting Officer. (e.g. Return to Work situation)
2. Timeline extensions (services and deliverables) would be subject to the approval of the CRA Requesting Officer and/or the Project Authority.
3. If a service standard cannot be met, the Contractor must contact the CRA Requesting Officer to advise of such a situation, and to provide the estimated date when the service will be rendered or the deliverable will be submitted to the CRA. Any such situations will be treated on a case-by-case basis, and the service standard will be negotiated between the CRA Requesting Representative and the Contractor and reflected in the Service Request. The Project Authority may be notified if required.



APPENDIX D

Quality Review Criteria Checklists

(For Office Ergonomic Assessments)

Tier One Review

Completed by: a Quality Assurance (QA) Agent

At a minimum, the following should be confirmed during the review:

- All fields are completed;
- The report is signed and dated by the Assessor;
- A grammar and spell check is completed; and
- The recommendations, clinical rationale, and/or explanations are clearly outlined.

Tier Two Review

Completed by: an Accredited Ergonomist

At a minimum, a Tier Two Review should be completed for the following:

- Complex Return-to-Work or Disability Management cases;
- When additional information is required to clearly demonstrate that the items/equipment will reduce or eliminate the ergonomic issues observed, or that the recommended equipment will reduce or eliminate the pain symptoms experienced;
- There is insufficient rationale provided when more than three equipment recommendations are made;
- There is insufficient detail related to the key design features outlined for the recommended product (s);
- When the report contains recommendations that could be considered non-standard;
- During the orientation period for a new Ergonomic Assessor, the first three reports should be reviewed; and
- During the probationary period (the conditions for probation will be identified, as part of the Contractor/Client orientation), all reports completed by an Ergonomic Assessor should be reviewed to ensure the quality of the work is verified.

Various Corrective Actions:

- Non-Conformance Report to the Project Authority for an ergonomic assessment, where there are critical errors;
- Enhancement to the Contractor's existing QA or training practices;
- Amendment to the report template or other related forms;
- Development of employee handouts;
- Learning Log or additional training for Ergonomic Assessor(s);
- Probationary status for an Ergonomic Assessor; and/or
- Removal of an Ergonomic Assessor from the contractor's roster.



APPENDIX E

Office Ergonomic Assessment Consent Form

I, _____ (*name of employee*), hereby authorize
_____ (*name of the CRA Ergonomic Service Provider*)

to release information to my employer representative(s) with respect to my job duties. This would be for the purpose of providing and/or clarifying information in order to support the Ergonomic Assessment Process.

This information would be treated as personal information, in accordance with the provisions of the *Privacy Act*. The Canada Revenue Agency (CRA) shall maintain the confidentiality of this information, and will not disclose it to a third party without my written consent, except where disclosure is required by law.

I declare that my consent has been given voluntarily. I understand that I may withdraw my consent at any time. Unless previously revoked by me in writing, this consent will expire 180 days from the date this form is signed.

Name of employee: _____
(Print name)

(Signature) **Date** _____
yyyy-mm-dd

Name of witness: _____
(Print name)

(Signature) **Date:** _____
yyyy-mm-dd



APPENDIX F – LIST OF CRA LOCATIONS

	REG	ADDRESS	CITY	PROV	ENGLISH	FRENCH	Ergonomic Services The names of resources or firms that the Bidder will utilize to provide Ergonomic Services to each CRA office.
1	ATL	201 St. George Street, E2A 4L8	Bathurst	NB	X	X	
2	ATL	217-770 Main St, E1C 1E7	Moncton	NB	X	X	
3	ATL	126 Prince William Street, E2L 2B6	Saint John	NB	X	X	
4	ATL	555 McAllister Drive, E2J 2S8	Saint John	NB	X	X	
5	ATL	1 Regent Square, A2H 7K6	Corner Brook	NF	X		
6	ATL	28C Cromer Avenue, A2A 1X2	Grand Falls-Windsor	NF	X		
7	ATL	132 Glencoe Drive, A1N 4R5	Mount Pearl	NF	X		
8	ATL	165 Duckworth Street, A1C 1G4	St. John's	NF	X		
9	ATL	290 Empire Avenue, A1B 3Z1	St. John's	NF	X		
10	ATL	1969 Upper Water Street, B3J 2T5	Halifax	NS	X		
11	ATL	1557 Hollis Street, B3J 3V4	Halifax	NS	X		
12	ATL	47 Dorchester Street, B1P 5Z2	Sydney	NS	X		
13	ATL	1-30 Brackley Point Road, PO Box 8500, C1A 8L3	Charlottetown	PE	X		
14	ATL	275 Pope Road, C1N 6A2	Summerside	PE	X		
15	HQ	20 Fitzgerald Road, K2H 8R6	Nepean	ON	X	X	
16	HQ	21 Fitzgerald Road, K2H 9J4	Nepean	ON	X	X	
17	HQ	25 Fitzgerald Road, K2H 1C3	Nepean	ON	X	X	
18	HQ	35 Fitzgerald Road, K2H 1E6	Nepean	ON	X	X	
19	HQ	250 Albert Street, K1P 6M1	Ottawa	ON	X	X	



	REG	ADDRESS	CITY	PROV	ENGLISH	FRENCH	Ergonomic Services The names of resources or firms that the Bidder will utilize to provide Ergonomic Services to each CRA office.
20	HQ	47 Clarence Street, K1N 9K1	Ottawa	ON	X	X	
21	HQ	750 Heron Road, K1V 1A7	Ottawa	ON	X	X	
22	HQ	112 Kent Street, K1P 5P2	Ottawa	ON	X	X	
23	HQ	200 Laurier Avenue West, K1P 6M7	Ottawa	ON	X	X	
24	HQ	410 Laurier Avenue West, K1R 1B7	Ottawa	ON	X	X	
25	HQ	427 Laurier Avenue West, K1R 7Y2	Ottawa	ON	X	X	
26	HQ	555 Mackenzie Avenue, K1A 0L5	Ottawa	ON	X	X	
27	HQ	99 Metcalfe Street, K1P 6L7	Ottawa	ON	X	X	
28	HQ	150 Slater Street, K1P 5M8	Ottawa	ON	X	X	
29	HQ	320 Queen Street, K1R 5A3	Ottawa	ON	X	X	
30	HQ	2323 Riverside Drive, K1H 8L5	Ottawa	ON	X	X	
31	HQ	1730 St. Laurent Boulevard, K1G 5L1	Ottawa	ON	X	X	
32	HQ	2465 St. Laurent Boulevard, K1G 6G8	Ottawa	ON	X	X	
33	HQ	180 Kent Street, K1A 0L9	Ottawa	ON	X	X	
34	HQ	344 Slater Street, K1R 7Y3	Ottawa	ON	X	X	
35	HQ	395 Terminal Avenue, K1A 0L5	Ottawa	ON	X	X	
36	ONT	81 Mulcaster Street, L4M 6J5	Barrie	ON	X		
37	ONT	11 Station Street, K8N 2S2	Belleville	ON	X		
38	ONT	80 National Street, P3E 5P9	Sudbury	ON	X	X	
39	ONT	1050 Notre Dame Avenue, P3A 4Z2	Sudbury	ON	X	X	
40	ONT	55 Bay Street North, L8R 3P7	Hamilton	ON	X		



	REG	ADDRESS	CITY	PROV	ENGLISH	FRENCH	Ergonomic Services The names of resources or firms that the Bidder will utilize to provide Ergonomic Services to each CRA office.
41	ONT	120 King Street West, L8N 1B2	Hamilton	ON	X		
42	ONT	31 Hyperion Court, K7L 5P3	Kingston	ON	X		
43	ONT	166 Frederick Street, N2H 2M4	Kitchener	ON	X		
44	ONT	50 Queen Street, N2H 6P4	Kitchener	ON	X		
45	ONT	451 Talbot Street, N6A 5C9	London	ON	X		
46	ONT	383 Richmond Street, N6A 5E5	London	ON	X		
47	ONT	5800 Hurontario Street, L5R 3T6	Mississauga	ON	X		
48	ONT	180 Sheriff Avenue, P1B 7K9	North Bay	ON	X	X	
49	ONT	5001 Yonge Street, M2N 6R9	North York	ON	X		
50	ONT	55 Athol St. E., L1H 1J8	Oshawa	ON	X		
51	ONT	2215 Gladwin Crescent, K1B 4X9	Ottawa	ON	X	X	
52	ONT	875 Heron Road, Building 1, K1A 1B1	Ottawa	ON	X	X	
53	ONT	333 Laurier Avenue West, K1P 1C1	Ottawa	ON	X	X	
54	ONT	2204 Walkley Road, K1A 1L8	Ottawa	ON	X	X	
55	ONT	1161 Crawford Dr, K9J 6X6	Peterborough	ON	X		
56	ONT	22 Bay Street, P6A 5S2	Sault Ste. Marie	ON	X	X	
57	ONT	55 Town Centre Court, M1P 4X4	Scarborough	ON	X		
58	ONT	200 Town Centre Court, M1P 4Y3	Scarborough	ON	X		
59	ONT	32 Church Street, St., L2R 3B0	St. Catherines	ON	X		
60	ONT	130 South Syndicate Avenue, P7E 1C7	Thunder Bay	ON	X		
61	ONT	655 Bay Street, M5G 2K4	Toronto	ON	X		



	REG	ADDRESS	CITY	PROV	ENGLISH	FRENCH	Ergonomic Services The names of resources or firms that the Bidder will utilize to provide Ergonomic Services to each CRA office.
62	ONT	1 Front Street West, M5J 2X6	Toronto	ON	X		
63	ONT	25 Sheppard Avenue West, M2N 6S6	Toronto	ON	X		
64	ONT	1555 Wentworth St., L1N 9T6	Whitby	ON	X		
65	ONT	441 University Ave, N9A 5R2	Windsor	ON			
66	ONT	185 Ouellette Avenue, N9A 4H7	Windsor	ON	X		
67	PAC	1620 Dickson Avenue, V1Y 9Y2	Kelowna	BC	X		
68	PAC	187 Nanaimo Avenue, V2A 1N4	Penticton	BC	X		
69	PAC	277 Winnipeg Street, V2A 1N6	Penticton	BC	X		
70	PAC	280 Victoria Street, V2L 4X3	Prince George	BC	X		
71	PAC	299 Victoria Street, V2L 5B8	Prince George	BC	X		
72	PAC	13450-102nd Avenue, V3T 5X3	Surrey	BC	X		
73	PAC	9737 King George Boulevard, V3T 5W6	Surrey	BC	X		
74	PAC	9755 King George Boulevard, V3T 5E1	Surrey	BC	X		
75	PAC	1188 West Georgia Street, V6E 4A2	Vancouver	BC	X		
76	PAC	300 West Georgia Street, V6B 4P4	Vancouver	BC	X		
77	PAC	757 Hastings Street West, V6C 1A1	Vancouver	BC	X		
78	PAC	1166 West Pender Street, V6E 3H8	Vancouver	BC	X		
79	PAC	1010 Seymour Street, V6B 4Y4	Vancouver	BC	X		
80	PAC	1260 Government Street, V8W 3M4	Victoria	BC	X		
81	PAC	1415 Vancouver Street, V8V 3W4	Victoria	BC	X		
82	PRA	1601 Airport Road North East, T2E 8W3	Calgary	AB	X		



	REG	ADDRESS	CITY	PROV	ENGLISH	FRENCH	Ergonomic Services The names of resources or firms that the Bidder will utilize to provide Ergonomic Services to each CRA office.
83	PRA	220- 4th Avenue South East, T2G 4X3	Calgary	AB	X		
84	PRA	10-9700 Jasper Avenue, T5J 4C8	Edmonton	AB	X		
85	PRA	200 – 419 7th Street South, T1J 0N8	Lethbridge	AB	X		
86	PRA	4996- 49th Avenue, T4N 6X2	Red Deer	AB	X		
87	PRA	1039 Princess Avenue, R7A 4J5	Brandon	MB	X		
88	PRA	360 Main Street, R3C 3Z3	Winnipeg	MB	X		
89	PRA	66 Stapon Road, R3C 3M2	Winnipeg	MB	X		
90	PRA	201 Weston Street, R3C 3H4	Winnipeg	MB	X		
91	PRA	325 Broadway Ave., R3C 4T4	Winnipeg	MB	X		
92	PRA	1783 Hamilton Street, S4P 2B6	Regina	SK	X		
93	PRA	1955 Smith Street, S4P 2N8	Regina	SK	X		
94	PRA	340-3rd Avenue North, S7K 0A8	Saskatoon	SK	X		
95	QC	3250 Lapinière Boulevard, J4Z 3T8	Brossard	QC	X	X	
96	QC	100 Lafontaine Street, G7M 6X2	Chicoutimi	QC		X	
97	QC	85 Chemin de La Savane, K1A 1L4	Gatineau	QC	X	X	
98	QC	2251 René-Lévesque Boulevard, G7X 6K0	Jonquiere	QC		X	
99	QC	3400 Jean-Béraud Avenue, H7T 2Z2	Laval	QC	X	X	
100	QC	305 René Lévesque Boulevard West, H2Z 1A6	Montreal	QC	X	X	
101	QC	400 Place d'Youville, H2Y 3N4	Montreal	QC	X	X	
102	QC	155 de la Pointe-aux-Lièvres Street South, G1K 5Y8	Quebec	QC		X	



	REG	ADDRESS	CITY	PROV	ENGLISH	FRENCH	Ergonomic Services The names of resources or firms that the Bidder will utilize to provide Ergonomic Services to each CRA office.
103	QC	165 de la Pointe-aux-Lièvres Street South, G1K 5Y8	Quebec	QC		X	
104	QC	180 de la Cathédrale Avenue, G5L 5H9	Rimouski	QC		X	
105	QC	44 Avenue du Lac, J9X 4N3	Rouyn-Noranda	QC		X	
106	QC	4695-12th Avenue, G9N 7V9	Shawinigan-Sud	QC		X	
107	QC	50 Place de la Cité, J1H 4G9	Sherbrooke	QC	X	X	
108	QC	2250 St-Olivier Street, G9A 4E9	Trois-Rivieres	QC		X	



ANNEX B: BASIS OF PAYMENT

CONTRACT YEAR ONE (1)

Individual Office Ergonomic Assessments

The Contractor shall be paid a firm unit rate (flat rate) per Individual Office Ergonomic Assessment. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Individual Office Ergonomic Assessment (1 employee) (A)	Firm unit rate per Individual Office Ergonomic Assessment of two (2) or more employees on the same day at the same CRA site (B)	No-show or cancellation with less than 24 hours notice (C)
Atlantic	Each	\$	\$	\$
National Capital	Each	\$	\$	\$
Ontario	Each	\$	\$	\$
Québec	Each	\$	\$	\$
Pacific	Each	\$	\$	\$
Prairies	Each	\$	\$	\$

Individual Office Ergonomic Follow Up Assessments

The Contractor shall be paid a firm unit rate (flat rate) per Individual Office Ergonomic Follow-up Assessment. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Individual Office Ergonomic Follow-Up Assessment (1 employee) (A)	Firm unit rate per Individual Office Ergonomic Follow-up Assessment of two (2) or more employees on the same day at the same CRA site. (B)	No-show or cancellation with less than 24 hours notice (C)
Atlantic	Each	\$	\$	\$
National Capital	Each	\$	\$	\$
Ontario	Each	\$	\$	\$
Québec	Each	\$	\$	\$
Pacific	Each	\$	\$	\$
Prairies	Each	\$	\$	\$

Ergonomic Assessment of employees' residential workstations;

The Contractor shall be paid a firm unit rate (flat rate) per Ergonomic Assessment of an employee's residential workstations. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Ergonomic Assessment of an employee's residential (A)	No-show or cancellation with less than 24 hours notice (B)
Atlantic	Each	\$	\$
National Capital	Each	\$	\$
Ontario	Each	\$	\$
Québec	Each	\$	\$
Pacific	Each	\$	\$
Prairies	Each	\$	\$



Training and Awareness Sessions

The Contractor shall be paid a firm hourly rate for delivering local training and awareness sessions.

Region	Unit of Issue	Firm hourly rate for delivering local training and awareness sessions (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$

Industrial Ergonomic Assessments

The Contractor shall be paid a firm hourly rate for delivering Industrial Ergonomic Assessments.

Region	Unit of Issue	Firm hourly rate for delivering Industrial Ergonomic Assessments (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$

Ergonomic Subject Matter Expertise

The Contractor shall be paid a firm hourly rate for providing Ergonomic Subject Matter Expertise.

Region	Unit of Issue	Firm hourly rate for delivering Ergonomic Subject Matter Expertise (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$



CONTRACT YEAR TWO (2)

Individual Office Ergonomic Assessments

The Contractor shall be paid a firm unit rate (flat rate) per Individual Office Ergonomic Assessment. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Individual Office Ergonomic Assessment (1 employee) (A)	Firm unit rate per Individual Office Ergonomic Assessment of two (2) or more employees on the same day at the same CRA site (B)	No-show or cancellation with less than 24 hours notice (C)
Atlantic	Each	\$	\$	\$
National Capital	Each	\$	\$	\$
Ontario	Each	\$	\$	\$
Québec	Each	\$	\$	\$
Pacific	Each	\$	\$	\$
Prairies	Each	\$	\$	\$

Individual Office Ergonomic Follow Up Assessments

The Contractor shall be paid a firm unit rate (flat rate) per Individual Office Ergonomic Follow-up Assessment. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Individual Office Ergonomic Follow-Up Assessment (1 employee) (A)	Firm unit rate per Individual Office Ergonomic Follow-up Assessment of two (2) or more employees on the same day at the same CRA site. (B)	No-show or cancellation with less than 24 hours notice (C)
Atlantic	Each	\$	\$	\$
National Capital	Each	\$	\$	\$
Ontario	Each	\$	\$	\$
Québec	Each	\$	\$	\$
Pacific	Each	\$	\$	\$
Prairies	Each	\$	\$	\$

Ergonomic Assessment of employees' residential workstations;

The Contractor shall be paid a firm unit rate (flat rate) per Ergonomic Assessment of an employee's residential workstations. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Ergonomic Assessment of an employee's residential (A)	No-show or cancellation with less than 24 hours notice (B)
Atlantic	Each	\$	\$
National Capital	Each	\$	\$
Ontario	Each	\$	\$
Québec	Each	\$	\$
Pacific	Each	\$	\$
Prairies	Each	\$	\$



Training and Awareness Sessions

The Contractor shall be paid a firm hourly rate for delivering local training and awareness sessions.

Region	Unit of Issue	Firm hourly rate for delivering local training and awareness sessions (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$

Industrial Ergonomic Assessments

The Contractor shall be paid a firm hourly rate for delivering Industrial Ergonomic Assessments.

Region	Unit of Issue	Firm hourly rate for delivering Industrial Ergonomic Assessments (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$

Ergonomic Subject Matter Expertise

The Contractor shall be paid a firm hourly rate for providing Ergonomic Subject Matter Expertise.

Region	Unit of Issue	Firm hourly rate for delivering Ergonomic Subject Matter Expertise (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$



OPTION YEAR ONE (1)

Individual Office Ergonomic Assessments

The Contractor shall be paid a firm unit rate (flat rate) per Individual Office Ergonomic Assessment. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Individual Office Ergonomic Assessment (1 employee) (A)	Firm unit rate per Individual Office Ergonomic Assessment of two (2) or more employees on the same day at the same CRA site (B)	No-show or cancellation with less than 24 hours notice (C)
Atlantic	Each	\$	\$	\$
National Capital	Each	\$	\$	\$
Ontario	Each	\$	\$	\$
Québec	Each	\$	\$	\$
Pacific	Each	\$	\$	\$
Prairies	Each	\$	\$	\$
TOTALS		\$	\$	\$

Individual Office Ergonomic Follow Up Assessments

The Contractor shall be paid a firm unit rate (flat rate) per Individual Office Ergonomic Follow-up Assessment. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Individual Office Ergonomic Follow-Up Assessment (1 employee) (A)	Firm unit rate per Individual Office Ergonomic Follow-up Assessment of two (2) or more employees on the same day at the same CRA site. (B)	No-show or cancellation with less than 24 hours notice (C)
Atlantic	Each	\$	\$	\$
National Capital	Each	\$	\$	\$
Ontario	Each	\$	\$	\$
Québec	Each	\$	\$	\$
Pacific	Each	\$	\$	\$
Prairies	Each	\$	\$	\$
TOTALS		\$	\$	\$

Ergonomic Assessment of employees' residential workstations;

The Contractor shall be paid a firm unit rate (flat rate) per Ergonomic Assessment of an employee's residential workstations. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Ergonomic Assessment of an employee's residential (A)	No-show or cancellation with less than 24 hours notice (B)
Atlantic	Each	\$	\$
National Capital	Each	\$	\$
Ontario	Each	\$	\$
Québec	Each	\$	\$
Pacific	Each	\$	\$
Prairies	Each	\$	\$



Training and Awareness Sessions

The Contractor shall be paid a firm hourly rate for delivering local training and awareness sessions.

Region	Unit of Issue	Firm hourly rate for delivering local training and awareness sessions (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$

Industrial Ergonomic Assessments

The Contractor shall be paid a firm hourly rate for delivering Industrial Ergonomic Assessments.

Region	Unit of Issue	Firm hourly rate for delivering Industrial Ergonomic Assessments (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$

Ergonomic Subject Matter Expertise

The Contractor shall be paid a firm hourly rate for providing Ergonomic Subject Matter Expertise.

Region	Unit of Issue	Firm hourly rate for delivering Ergonomic Subject Matter Expertise (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$



OPTION YEAR TWO (2)

Individual Office Ergonomic Assessments

The Contractor shall be paid a firm unit rate (flat rate) per Individual Office Ergonomic Assessment. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Individual Office Ergonomic Assessment (1 employee) (A)	Firm unit rate per Individual Office Ergonomic Assessment of two (2) or more employees on the same day at the same CRA site (B)	No-show or cancellation with less than 24 hours notice (C)
Atlantic	Each	\$	\$	\$
National Capital	Each	\$	\$	\$
Ontario	Each	\$	\$	\$
Québec	Each	\$	\$	\$
Pacific	Each	\$	\$	\$
Prairies	Each	\$	\$	\$

Individual Office Ergonomic Follow Up Assessments

The Contractor shall be paid a firm unit rate (flat rate) per Individual Office Ergonomic Follow-up Assessment. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Individual Office Ergonomic Follow-Up Assessment (1 employee) (A)	Firm unit rate per Individual Office Ergonomic Follow-up Assessment of two (2) or more employees on the same day at the same CRA site. (B)	No-show or cancellation with less than 24 hours notice (C)
Atlantic	Each	\$	\$	\$
National Capital	Each	\$	\$	\$
Ontario	Each	\$	\$	\$
Québec	Each	\$	\$	\$
Pacific	Each	\$	\$	\$
Prairies	Each	\$	\$	\$

Ergonomic Assessment of employees' residential workstations;

The Contractor shall be paid a firm unit rate (flat rate) per Ergonomic Assessment of an employee's residential workstations. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Ergonomic Assessment of an employee's residential (A)	No-show or cancellation with less than 24 hours notice (B)
Atlantic	Each	\$	\$
National Capital	Each	\$	\$
Ontario	Each	\$	\$
Québec	Each	\$	\$
Pacific	Each	\$	\$
Prairies	Each	\$	\$



Training and Awareness Sessions

The Contractor shall be paid a firm hourly rate for delivering local training and awareness sessions.

Region	Unit of Issue	Firm hourly rate for delivering local training and awareness sessions (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$

Industrial Ergonomic Assessments

The Contractor shall be paid a firm hourly rate for delivering Industrial Ergonomic Assessments.

Region	Unit of Issue	Firm hourly rate for delivering Industrial Ergonomic Assessments (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$

Ergonomic Subject Matter Expertise

The Contractor shall be paid a firm hourly rate for providing Ergonomic Subject Matter Expertise.

Region	Unit of Issue	Firm hourly rate for delivering Ergonomic Subject Matter Expertise (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$



OPTION YEAR THREE (3)

Individual Office Ergonomic Assessments

The Contractor shall be paid a firm unit rate (flat rate) per Individual Office Ergonomic Assessment. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Individual Office Ergonomic Assessment (1 employee) (A)	Firm unit rate per Individual Office Ergonomic Assessment of two (2) or more employees on the same day at the same CRA site (B)	No-show or cancellation with less than 24 hours notice (C)
Atlantic	Each	\$	\$	\$
National Capital	Each	\$	\$	\$
Ontario	Each	\$	\$	\$
Québec	Each	\$	\$	\$
Pacific	Each	\$	\$	\$
Prairies	Each	\$	\$	\$

Individual Office Ergonomic Follow Up Assessments

The Contractor shall be paid a firm unit rate (flat rate) per Individual Office Ergonomic Follow-up Assessment. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Individual Office Ergonomic Follow-Up Assessment (1 employee) (A)	Firm unit rate per Individual Office Ergonomic Follow-up Assessment of two (2) or more employees on the same day at the same CRA site. (B)	No-show or cancellation with less than 24 hours notice (C)
Atlantic	Each	\$	\$	\$
National Capital	Each	\$	\$	\$
Ontario	Each	\$	\$	\$
Québec	Each	\$	\$	\$
Pacific	Each	\$	\$	\$
Prairies	Each	\$	\$	\$

Ergonomic Assessment of employees' residential workstations;

The Contractor shall be paid a firm unit rate (flat rate) per Ergonomic Assessment of an employee's residential workstations. There will be **no fee** for cancellations provided with 24-hours notice or more.

Region	Unit of Issue	Firm unit rate per Ergonomic Assessment of an employee's residential (A)	No-show or cancellation with less than 24 hours notice (B)
Atlantic	Each	\$	\$
National Capital	Each	\$	\$
Ontario	Each	\$	\$
Québec	Each	\$	\$
Pacific	Each	\$	\$
Prairies	Each	\$	\$



Training and Awareness Sessions

The Contractor shall be paid a firm hourly rate for delivering local training and awareness sessions.

Region	Unit of Issue	Firm hourly rate for delivering local training and awareness sessions (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$

Industrial Ergonomic Assessments

The Contractor shall be paid a firm hourly rate for delivering Industrial Ergonomic Assessments.

Region	Unit of Issue	Firm hourly rate for delivering Industrial Ergonomic Assessments (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$

Ergonomic Subject Matter Expertise

The Contractor shall be paid a firm hourly rate for providing Ergonomic Subject Matter Expertise.

Region	Unit of Issue	Firm hourly rate for delivering Ergonomic Subject Matter Expertise (A)
Atlantic	Hour	\$
National Capital	Hour	\$
Ontario	Hour	\$
Québec	Hour	\$
Pacific	Hour	\$
Prairies	Hour	\$

Goods and Services Tax or Harmonized Sales Tax as applicable, is extra to the "Total Estimated Cost" shown herein and shall be paid in accordance with the provisions of the General Conditions.

A day is defined as 7.5 hours exclusive of meal breaks. A Work Week is defined as Monday to Friday inclusive, excluding Saturday and Sunday. Payment shall be for days actually worked with no provision for overtime rate, annual leave, local, provincial and national statutory holidays and sick leave. Time worked which is more or less than a day shall be prorated to reflect actual time worked.

NOTE TO BIDDERS: TABLES TO BE COMPLETED AT TIME OF AWARD BASED ON THE SUCCESSFUL BIDDER'S PROPOSAL.

ALL PAYMENTS ARE SUBJECT TO GOVERNMENT AUDIT.



ANNEX C: SECURITY REQUIREMENTS CHECK LIST (SRCL)



Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat 1000320941
Security Classification / Classification de sécurité

SECURITY REQUIREMENTS CHECK LIST (SRCL)

LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE

1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine Canada Revenue Agency		2. Branch or Directorate / Direction générale ou Direction Human Resources Branch. Workplace Relations and Compensation Directorate	
3. a) Subcontract Number / Numéro du contrat de sous-traitance		3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail The contractor would provide ergonomic services to the Canada Revenue Agency (CRA). This would include completing ergonomic assessments of workstations as well as industrial environments, delivering training on ergonomic topics, and providing other ergonomic services such as research.			
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
6. Indicate the type of access required / Indiquer le type d'accès requis			
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)		<input type="checkbox"/> No Non	<input checked="" type="checkbox"/> Yes Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès			
Canada <input checked="" type="checkbox"/>		NATO / OTAN <input type="checkbox"/>	
Foreign / Étranger <input type="checkbox"/>			
7. b) Release restrictions / Restrictions relatives à la diffusion			
No release restrictions Aucune restriction relative à la diffusion	<input checked="" type="checkbox"/>	All NATO countries Tous les pays de l'OTAN	<input type="checkbox"/>
Not releasable À ne pas diffuser	<input type="checkbox"/>		
Restricted to: / limité à : Specify country(ies): / préciser le(s) pays :	<input type="checkbox"/>	Restricted to: / Limité à : Specify country(ies): / Préciser le(s) pays :	<input type="checkbox"/>
7. c) Level of information / Niveau d'information			
PROTECTED A PROTÉGÉ A	<input checked="" type="checkbox"/>	NATO UNCLASSIFIED NATO NON CLASSIFIÉ	<input type="checkbox"/>
PROTECTED B PROTÉGÉ B	<input type="checkbox"/>	NATO RESTRICTED NATO DIFFUSION RESTREINTE	<input type="checkbox"/>
PROTECTED C	<input type="checkbox"/>	NATO CONFIDENTIAL	<input type="checkbox"/>
		PROTECTED A PROTÉGÉ A	<input type="checkbox"/>
		PROTECTED B PROTÉGÉ B	<input type="checkbox"/>
		PROTECTED C	<input type="checkbox"/>



PROTÉGÉ C		NATO CONFIDENTIEL		PROTÉGÉ C	
CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/>	NATO SECRET NATO SECRET	<input type="checkbox"/>	CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/>
SECRET SECRET	<input type="checkbox"/>	COSMIC TOP SECRET COSMIC TRÈS SECRET	<input type="checkbox"/>	SECRET SECRET	<input type="checkbox"/>
TOP SECRET TRÈS SECRET	<input type="checkbox"/>			TOP SECRET TRÈS SECRET	<input type="checkbox"/>
TOP SECRET (SIGINT) TRÈS SECRET (SIGINT)	<input type="checkbox"/>			TOP SECRET (SIGINT) TRÈS SECRET (SIGINT)	<input type="checkbox"/>

PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? No / Non Yes / Oui
Short Title(s) of material / Titre(s) abrégé(s) du matériel :
Document Number / Numéro du document :

PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

<input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITÉ	<input type="checkbox"/> CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/> SECRET SECRET	<input type="checkbox"/> TOP SECRET TRÈS SECRET
<input type="checkbox"/> TOP SECRET - SIGINT TRÈS SECRET - SIGINT	<input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/> NATO SECRET NATO SECRET	<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET
<input type="checkbox"/> SITE ACCESS ACCÈS AUX EMBLEMES			

Special comments:
Commentaires spéciaux : Reference Question 11e) – Information will be exchanged by Email or Fax.

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.
REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? No / Non Yes / Oui
If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté? No / Non Yes / Oui

PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?
Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

11. b) Will the supplier be required to safeguard COMSEC information or assets?
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC? No / Non Yes / Oui

PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment No / Non Yes / Oui



occur at the supplier's site or premises?

Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?

INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS?

No / Non Yes / Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale?

No / Non Yes / Oui

PART C - (continued) / PARTIE C - (suite)

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.

Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.

Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category / Catégorie	PROTECTED / PROTÉGÉ			CLASSIFIED / CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET	NATO RESTRICTED / NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL / NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET / COSMIC TRÈS SECRET	PROTECTED / PROTÉGÉ			CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET
											A	B	C			
Information / Assets / Renseignements / Biens	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Production	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT Media / Support TI	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT Link / Lien électronique	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?

No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?

No Yes



La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

Non Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).

Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité



Contract Number / Numéro du contrat

1000320941

Security Classification / Classification de sécurité

PART D - AUTHORIZATION / PARTIE D - AUTORISATION

13. Organization Project Authority / Chargé de projet de l'organisme

Name (print) - Nom (en lettres moulées)

Title – Titre

Signature

(Signature on File)

On File

Telephone No. - N° de téléphone

Facsimile No. - N° de télécopieur

E-mail address - Adresse courriel
@cra-arc.gc.ca

Date

14. Organization Security Authority / Responsable de la sécurité de l'organisme

Name (print) - Nom (en lettres moulées)

Title – Titre

Signature

(Signature on File)

On File

Telephone No. - N° de téléphone

Facsimile No. - N° de télécopieur

E-mail address - Adresse courriel

Date

15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached?

Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?

No Yes
 Non Oui

(see attached instructions)

16. Procurement Officer / Agent d'approvisionnement

Name (print) - Nom (en lettres moulées)

Title – Titre

Signature

(Signature on File)

Henrique Carrera

A/Supply Project manager

Telephone No. - N° de téléphone
(613) 946-8178

Facsimile No. - N° de télécopieur
613-948-2459

E-mail address - Adresse courriel
Henrique.Carrera@cra-arc.gc.ca

Date

17. Contracting Security Authority / Autorité contractante en matière de sécurité

Name (print) - Nom (en lettres moulées)

Title – Titre

Signature

Telephone No. - N° de téléphone

Facsimile No. - N° de télécopieur

E-mail address - Adresse courriel

Date



SECURITY INSTRUCTIONS

Contractors who are required to handle (access, store & transport) Agency protected information outside of the Canada Revenue Agency (CRA) premises for the performance of this contract must comply with the following security instructions:

- Contractors are to ensure that unauthorized persons do not have access to Agency protected information. Access to Agency information is to be controlled and limited to personnel who have a job related need-to-know and have a Reliability Status.
- Contractors are to ensure that access and safeguards for Agency information are based on a clearly discernable appropriate number of progressive zones to reduce the risk of unwanted events. (E.g. Public Zone, Reception Zone and Operations Zone). The first two zones are not considered secure for protecting Agency information. Agency protected information must be located in an Operations Zone where access is limited to personnel who work there and properly escorted visitors.
- Contractors are to ensure that Agency protected information is to be secured in offices with access controls such as the following types of locks: Unican or cipher locks. Card access systems or receptionists during office hours and deadbolts at all other times.
- Contractors are to store Agency protected information in a key lock drawer or container located in a locked room when not in use or in a locked office only if the access is limited to those with a need-to-know. All lockable commercial furniture and standard locks are suitable.
- All laptops and notebooks processing and storing Agency information are to be protected by an Agency-approved full disk encryption software (such as: Microsoft Bit Locker) they must be stored in a locked drawer or container to reduce the risk of theft when they are not located in individual offices. Contractors are required to secure this equipment in a locked briefcase or container when removing it from their offices.
- Agency protected information stored on removable media such as disks, CDs /DVDs, USB sticks, etc., is to be protected by an Agency-approved full disk encryption software (such as Microsoft Bit Locker to Go). All removable media is to be stored in locked drawer or container.
- All Agency protected information is to be returned when no longer required with a written notification that the information has been returned. Contractors are to store Agency protected waste in a locked container until it is returned.
- Contractors must not reproduce (copy) Agency protected information.
- Contractors must report immediately any actual or suspected loss, or unauthorized disclosure of information to the Agency official.

IN TRANSIT

- When Contractors are transporting Agency protected information they should, as a general rule, exercise good judgment and ensure that every reasonable effort has been made to minimize the risk to the information at all times.
- When Contractors are transporting Agency protected information they are to secure the information in a locked briefcase. The briefcase must be tagged with a forwarding or return address and/or phone number of the contractors 'office. While travelling by vehicle, the briefcase must be placed in a locked trunk, or out of sight in a locked vehicle.
- While on public transit systems, Contractors are to maintain control of the briefcase containing Agency protected information and are not to expose the material to others.



ANNEX D: INSURANCE REQUIREMENTS

D.1 COMMERCIAL GENERAL LIABILITY INSURANCE

1. The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, 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. 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.

D.2 MEDICAL MALPRACTICE LIABILITY

1. The Contractor must obtain Medical Malpractice Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$1,000,000 per loss and in the annual aggregate, inclusive of the defence costs.
2. Coverage is for what is standard in a Medical Malpractice policy and must be for claims arising out of the rendering or failure to render medical services resulting in injury, mental injury, illness, disease or death of any person caused by any negligent act, error or omission committed by the Contractor in or about the conduct of the Contractor's professional occupation or business of good samaritan acts.
3. 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.
4. Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation.

D.3 ERRORS AND OMISSIONS LIABILITY INSURANCE

1. The Contractor must obtain Errors and Omissions Liability (a.k.a. Professional Liability) insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract 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 E: REQUIREMENTS FOR CRA SYNERGY SOLUTION

1. Overview

The Canada Revenue Agency’s (CRA) e-commerce solution for ordering, receiving and reconciling goods and services is an Ariba tool which has been branded internally as “Synergy”.

Synergy is an end-to-end e-procurement system based on the Ariba suite of products. Synergy is the primary system the CRA uses to purchase goods and services with an Acquisition Card. Ariba provides the CRA with two methods of purchasing:

1. Purchase Card Orders (PCO): Purchases made by CRA Purchasers from catalogues within the Synergy e-commerce solution.
2. External purchases: Purchases made by CRA Purchasers outside the Synergy e-commerce solution.

The Synergy Catalogue Order Requirements section of this Annex describes the process for PCOs while the Requirements for External-Purchase Method section describes the process for external purchases. The CRA may use one or both of these methods for the purchase of goods and services under the Contract.

The requirements for the Contractor to support CRA purchases under the Contract using Synergy are detailed below. These requirements include support for catalogue orders and external purchase methods, and the need for on-going Contractor support during the term of the Contract, including any exercised option period(s).

2. Glossary of Terms

Term	Definition
Acquisition Card:	A federal government credit card, also known as a Purchase Card. The Acquisition Card that is currently used by the CRA is a MasterCard provided by Bank of Montreal.
Advance Ship Notice (applicable only in Annex E: Requirements for CRA Synergy Solution):	A message the Contractor transmits, through the Ariba Supplier Network, to Synergy stating that the Contractor is shipping one or more items on a Purchase Card Order
Ariba Supplier Network (ASN):	An e-business solution, proprietary to Ariba that connects businesses across different systems and processes.
Catalogue	A detailed list of all the goods and services offered by the Contractor that will be available through Synergy.
Cancel Order:	A request to cancel an Order already sent to the Contractor.
Change Order:	A request to modify an Order already sent to the Contractor. A Change Order retains the same unique Order number as the original, but has a different version number.
.CIF:	Catalogue Interchange Format. A format for text files used to populate electronic catalogues.
Contractor:	The supplier identified on page one of the Contract.
CRA Purchasers:	CRA Purchasers are responsible for placing Orders, receiving goods and services, managing returns and exchanges, and verifying reconciliation of Orders with acquisition card charges.
CRA Synergy Vendor Enablement Coordinator (CRA SVEC):	CRA resource that enables the Contractor’s catalogue and the PCO Process, as well as identifies, troubleshoots, and resolves system issues throughout the Proof of Synergy Compliance Testing (PoSC) phase and the life of the contract, including any exercised option period(s).
Credit:	A transaction reverse; the credit must contain the same Level II transaction data as its respective debit.
DUNS:	The Data Universal Numbering System is a unique nine-digit identification sequence for a single business entity. For more information on this term, visit:



	http://www.dnb.ca/get-a-duns-number.html
External Purchase Method:	Orders that are placed outside of the Synergy application.
Ghost Card:	A CRA acquisition card account that is assigned to an individual Contractor and Contract.
Goods Receipt:	A goods receipt is a document that records which items requested on a Purchase Card Order (PCO) have been received. Any receipt can be used to record acceptance and/or rejection of items.
GSIN Codes	Goods and Services Identification Number
Issue Tracker	The ticketing system used by the Acquisition Service Desk and the Acquisition Card Program to log and track all inquiries.
Level II credit card transaction data:	The minimum Order data that the Contractor must provide to CRA. This data must include at a minimum: the Synergy Purchase Card Order (PCO) number (passed to the Contractor over the ASN, maximum of 25 characters), the order amount and the GST/HST amount.
Orders	A generic term that can be to reference both orders placed using the external purchase method as well as Purchase Card Orders.
Obsolete Order:	When a Purchase Card Order (PCO) is changed or cancelled, the previous PCO version becomes out-dated and its routing status becomes "Obsolete" in the ASN.
Order Confirmations:	A message the Contractor transmits, through the Ariba Supplier Network, to Synergy stating that the Contractor is accepting one or more items on a Purchase Card Order.
PoSC	Proof of Synergy Compliance
Progress Report:	A report detailing progress towards resolving a problem. The report must contain at a minimum, a description of the problem, the date and time the problem occurred, the date and time problem was discovered, the steps required to resolve the problem and the estimated date the problem will be resolved.
Purchase Card:	A federal government credit card, also known as an Acquisition Card. The Purchase Card that is currently used by the CRA is a MasterCard provided by Bank of Montreal.
Purchase Card Order (PCO):	An Order created in Synergy consisting of goods and/or services that the CRA is purchasing. PCO's are created using a Contractor provided catalogue and transmitted to the Contractor via the ASN. A PCO includes a unique identifier, one or more line items (descriptions of items being purchased, quantity, and unit price), the name and contact information of the person placing the PCO, and the shipping address.
Purchase Requisition (PR):	The Purchase Requisition (PR) is created in Synergy and contains the goods and/or services that the CRA is purchasing. Once the PR is submitted and approved, the PR generates a PCO(s), which is sent to the Contractor via the ASN.
Receipt	The act of receiving goods or services.
Rejection Notification	Rejection Email Notifications are sent to the Contractor by Synergy if the CRA Purchaser chooses to return goods for credit or exchange goods.
Return for Credit	If a CRA Purchaser chooses to return goods for credit, a rejection email notification will indicate each applicable line item, including the item description, product code, rejection reason, and a value of Yes in the Return for Credit field.
Return for Exchange	If a CRA Purchaser chooses to exchange goods, the rejection email notification will indicate each applicable line item, including the item description, product code, rejection reason, and a value of Yes in the Return for Exchange field
Supplier:	The Contractor. The term supplier is also used interchangeably with Contractor.
UNSPSC:	United Nations Standard Product and Services Classification. For more information on this term, visit: http://www.unspsc.org
Vendor	The term Vendor is also used interchangeably with Contractor.



WHMIS:	The Workplace Hazardous Materials Information System is Canada's national hazard communication standard. For more information on this term, visit: http://www.hc-sc.gc.ca/ewh-semt/occup-travail/whmis-simdut/index-eng.php
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3. CRA Synergy Stakeholders

This section describes the CRA Synergy stakeholders and their respective roles and responsibilities. The descriptions of the stakeholder responsibilities are not all-inclusive; and may be modified at CRA's sole discretion as required.

CRA Purchasers: The Synergy application supports electronic purchases for over 1,700 CRA purchasers. CRA Purchasers are responsible for placing Orders, receiving services, processing/managing returns and exchanges, and verifying reconciliation of Orders with acquisition card charges. The Contractor will not deal directly with the CRA Purchaser except in the following situations:

- To process a return or exchange items delivered under an Order as described in the Requirements for External-Purchase Method section below; or
- To request or provide clarification on items ordered.

CRA Acquisition Service Desk: The CRA Acquisition Service Desk provides national support to CRA Purchasers, the CRA Contracting Authority and the Contractor. The CRA Acquisition Service Desk's responsibilities include:

- Assisting CRA Purchasers and the Contractor with system related billing and delivery issues;
- Distributing the Ghost Card number to the Contractor; and
- Working with the CRA Purchasers and the Contractor to resolve issues related to: returns, exchanges Cancelling Orders and Changing Orders.

Note: Contacts to be provided at time of contract award.

CRA Synergy Vendor Enablement Coordinator (CRA SVEC): The Contractor will work with the CRA Synergy Vendor Enablement Coordinator (SVEC) to enable the Contractor's catalogue and the PCO Process, as well as to identify, troubleshoot, and resolve system issues throughout PoSC testing phase and the life of the contract, including any exercised option period(s).

4. Synergy Catalogue Order Requirements

This section details the requirements for the Contractor to interact with the CRA in Synergy. The requirements are divided into the following areas:

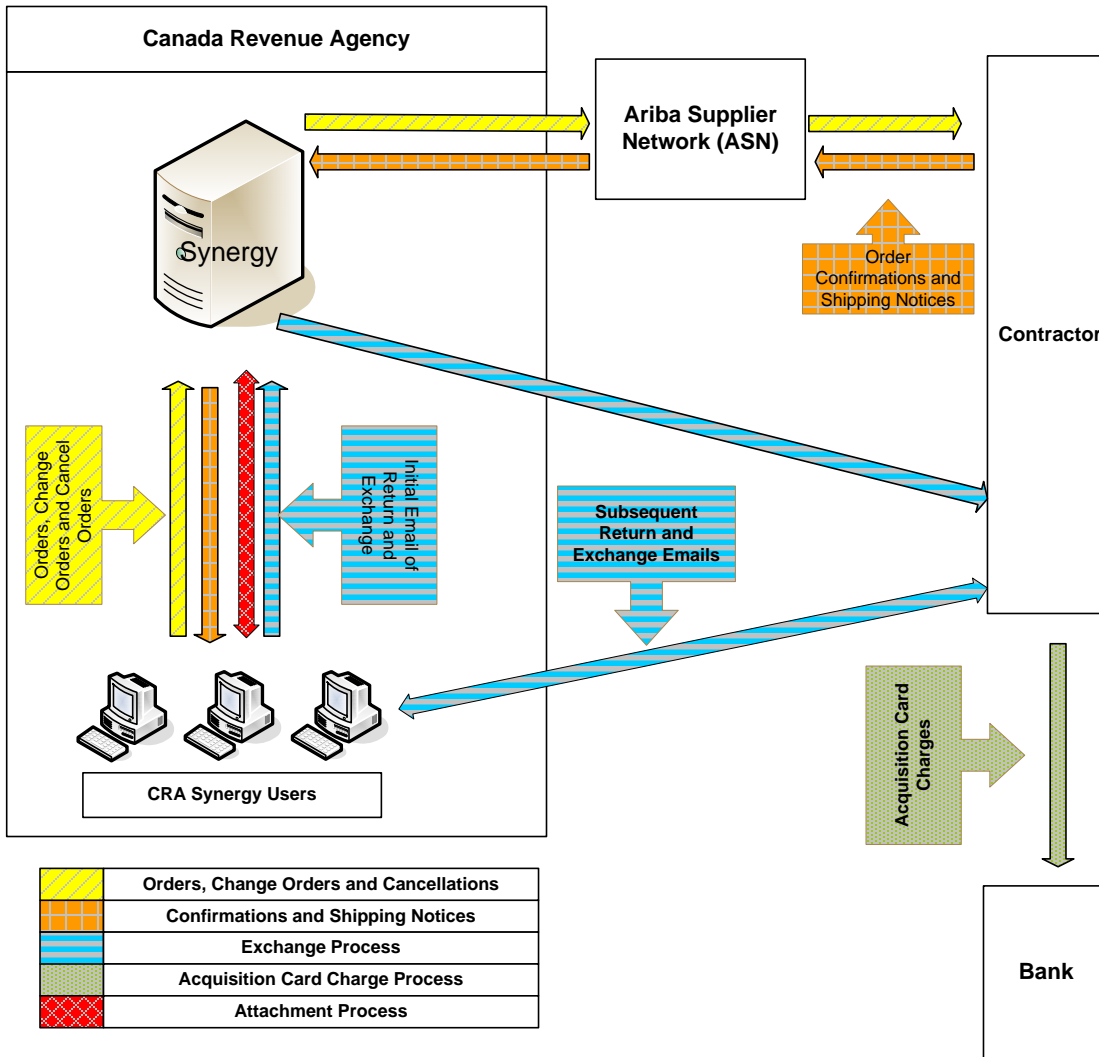
- Synergy communication flow
- Ariba Supplier Network (ASN)
- PCO and Change Order Process Requirements
- Cancel Order process requirements
- Order receipt and rejection (returns and exchanges) process requirements (where applicable)
- Synergy catalogue requirements
- Acquisition Card charges

5. CRA Synergy Solution Communication Flow

The following illustration describes the communication flow between the parties involved in the Synergy solution.



CRA Synergy Solution Communication Flow





6. Ariba Supplier Network (ASN) Requirements

The ASN is an e-business solution that connects buyers and suppliers across different systems and processes. The CRA and the Contractor will use the ASN to communicate order related information, including, and without limitation:

- Purchase Card Orders, Change Orders, and Cancel Orders from the CRA to the Contractor; and
- Order Confirmation and Advance Ship Notices from the Contractor to the CRA.

The Contractor is required to establish and maintain an ASN production and test account throughout the life of the Contract.

The Contractor must:

- Virus-scan attachments sent over the ASN.
- Send an Order Confirmation message within 30 minutes of receiving a Purchase Card Order, Change Order, or Cancel Order from the CRA.
- Correctly verify that the goods and services are available and will be shipped under the terms of the Contract before they send the Order Confirmation message.
- Include backorder details, if applicable, in the Order confirmation message.
- Send an Advance Ship Notice when goods are shipped.

The Contractor must disregard the Acquisition card related fields on the Purchase Card Order. CRA does not send Acquisition Card information over the ASN.

The Contractor must obtain written authorization from the CRA Contracting Authority as well as the CRA Acquisition Service Desk before rejecting a Purchase Card Order.

7. PCO and Change Order Process Requirements

CRA Purchasers will submit PCOs and Change Orders to the Contractor through Synergy.

The Contractor shall receive PCOs and Change Orders from the ASN.

The Contractor must not substitute items without written authorization from the CRA Contracting Authority.

For goods, the Contractor must include a packing slip with each shipment. The packing slip must specify the Contractor's name, address, and GST registration number, the PCO number, CRA Purchaser, date the goods were shipped, description of the goods, cost (before tax), tax amount, and total amount to be charged to the Ghost Card, including applicable taxes.

For services, the Contractor must provide written details of the services provided. The summary must specify the Contractor's name, address, and GST registration number, the PCO number, CRA Purchaser name, date the service was completed, description of the service, cost (before tax), tax amount, and total amount to be charged to the CRA Ghost Card including applicable tax.



8. Cancel Order Process Requirements

Purchase Card Orders may be cancelled in whole or in part. All Cancel Order requests will be routed to the CRA Acquisition Service Desk for processing before being transmitted electronically to the Contractor through Synergy to the ASN.

The Cancel Order procedure is as follows:

1. CRA Purchaser logs into Synergy and opens the PCO to cancel.
2. CRA Purchaser cancels the PCO.
3. Synergy creates a new version of the PCO and routes it to the CRA Acquisition Service Desk for processing.
4. CRA Acquisition Service Desk team confirms that Synergy has not received an Advance Ship Notice and then contacts the Contractor via email to confirm that the PCO has not been shipped. If neither condition has been met, the PCO cancellation can be processed in Synergy by the CRA Acquisition Service Desk team.
5. Synergy sends the Cancel Order to the Contractor through the ASN.

Once successfully cancelled, the status of the original PCO in ASN changes to Cancelled and an order cancellation message is sent to the Contractor over the ASN. The status of the purchase order then changes to "Obsolete" on the ASN.

The Contractor may not confirm or reject cancelled orders, nor create order-fulfillment messages (order confirmation or advance shipping notices) against an Obsolete Order.

CRA Purchasers may not issue Cancel Orders for line items that have been shipped or for which an Advance Ship Notice has been sent.

9. Order Receipt and Rejection (Returns and Exchanges) Process Requirement (Where applicable)

Receipt and Rejection (Returns or Exchange)

PCO purchased items may be rejected, in whole or in part, by the CRA Purchaser.

A Rejection notification will be transmitted to the Contractor by email for any item being returned or exchanged. Rejected items will be marked as 'rejected' within Synergy by the CRA Purchaser and a rejection reason will be identified on the email notification

The Receipt and Rejection (Return and Exchange) Process:

1. The CRA Purchaser physically receives the goods.
2. The CRA Purchaser inspects the goods and determines if any part of the delivery should be rejected.
3. The CRA Purchaser logs into Synergy and opens the corresponding PCO.
4. The CRA Purchaser records in Synergy, for each line item, the rejected quantity and rejection reason.
5. The CRA Purchaser completes the Goods Receipt.
6. If applicable, Synergy will send the Contractor a rejection email notification and this notification is cc'd to the corresponding CRA Purchaser. The rejection email notification will specify either a return for credit or a return for exchange, at CRA's sole discretion:

If the CRA Purchaser chooses to return the goods for credit, the rejection email notification will indicate each applicable line item, including the item description, product code, rejection reason, and a value of Yes in the Return for Credit field, or:

If the CRA Purchaser chooses to exchange the goods, the rejection email notification will indicate each applicable line item, including the item description, product code, rejection reason, and a value of Yes in the Return for Exchange field.



7. The Contractor is responsible for contacting the CRA Purchaser via email within one business day to coordinate the return or exchange of goods. The Contractor must provide the CRA Purchaser with any special instructions; for example, returning the product in its original packaging.
8. The CRA Purchaser must package the rejected items for pickup.
9. The Contractor picks up the rejected goods.
10. If the line item is a return for credit, the Contractor will credit the Ghost Card. If the line item is a return for exchange, the Contractor will ship the new item.

The Contractor must provide the CRA SVEC a new email address for the technical support group (as per Section 14, Order and Billing Support), via email, at least three business days prior to changing the email address for the rejection notifications.

10. Synergy Catalogue Requirements

Description: Purchase Card Orders originate in Synergy. CRA Purchasers create a Purchase Requisition (PR) in Synergy by adding items from one or more of the CRA-hosted catalogues to shopping carts. After the CRA Purchaser submits the PR, the shopping carts are work-flowed for internal CRA approval, if applicable. Once approved, the PR is converted into a PCO and sent to the Contractor through Synergy to the ASN for fulfilment.

Catalogue: During the Proof of Synergy Compliance (PoSC) Testing, the Contractor must provide the CRA SVEC with a catalogue in .CIF format via email. The catalogue must include all goods and services offered by the Contractor that will be available through Synergy.

The Contractor must maintain the catalogue during the period of the Contract as well as any exercised option period(s).

Catalogue Format:

- The .CIF catalogue is a comma delimited file.
- Unless otherwise specified, all fields are mandatory.
- The Item Description and Short Name must clearly, accurately and correctly describe the product or service.
- All fields are case-sensitive.

The following table details the fields where the Contractor must enter a value when using the .CIF catalogue format.

Number	Field Name	Item Description
1	Supplier ID	Supplier's DUNS number
2	Supplier Part ID	Up to 128 characters Remove all special characters (*, ?, &, etc.).
3	Manufacture Part ID	Up to 128 characters
4	Item Description	Up to 2000 characters. This field will be displayed in the long description field on the online catalogue. Must be English for English lines and French for French lines.
5	SPSC Code	Up to 40 characters, integer. This is the product-commodity code in an eight-digit UNSPSC format.
6	Unit Price	The CRA price as per discount and contract (net). Cannot exceed two decimal places.
7	Units of Measure	UN or ANSI X.12 standard unit of measure. This is the product's UOM, such as BX for "box" and EA for "each."
8	Lead Time	Integer characters only. This is the number of business days between receipt of order and delivery to customer.



Number	Field Name	Item Description
9	Manufacturer Name	Supplier's name
10	Supplier URL	In the format: http://
11	Manufacturer URL	In the format: http://
12	Market Price	This is the list price or suggested retail price. Cannot exceed two decimal places.
13	Short Name	Up to 50 characters (English or French). This field will be displayed in the short description field on the online catalogue. Must be English for English lines and French for French lines.
14	Expiration Date	Contractors leave this field blank.
15	Effective Date	Contractors leave this field blank.
16	Language	Use en_CA for English line items and fr_CA for French line items.
17	Supplier Part Auxiliary ID	Use en_CA for English line items and fr_CA for French line items. This is not the supplier part number.
18	image	Used to indicate the filename of the image or picture. Do not use special characters (*, ?,,) in the filename.
19	Delete	Leave blank on new catalogues. This is an optional field to indicate whether this item is to be deleted. Enter "T" (for True) to identify a deleted status, otherwise this field remains empty This field is used in incremental catalogue loading.
20	WHMIS	Used to indicate if a catalogue item is a hazardous material. Enter Yes or No (for English line items) or Oui or Non (for French line items).
21	greenprocurement	Used to indicate if a catalogue item is classified as a green product. Enter Yes or No (for English line items) or Oui or Non (for French line items). Questions regarding this classification should be forwarded to the contracting authority.
22	strategicallysourced	Please enter Yes (for English line items) or Oui (for French line items). All catalogue items are considered strategically sourced.



The following picture illustrates the format of a .cif file (as displayed in MS Notepad):

```
CRASampleCatalogue.cif - Notepad
File Edit Format View Help
CIF_I_V3.0
LOADMODE: F
CHARSET: 8859_1
CODEFORMAT: UNSPSC
CURRENCY: CAD
COMMENTS: This is a sample CIF 3.0 file
SUPPLIERID_DOMAIN: DUNS
FIELDNAMES: Supplier ID, Supplier Part ID, Manufacturer Part ID, Item Description, SPSC Code, Unit Price, Unit of Measure
TIMESTAMP: 2008-02-15 15:25:04
UNUOM: TRUE
ITEMCOUNT: 2
DATA
6565,2B,2B1C,Men's black shoes,53111601,54.95,PR,2,,,,Men's black shoes,2010-03-01,2008-08-01,en_CA,en_CA,blk_shoe_2
6565,2B,2B1C,"Chaussures noires des hommes",53111601,119.95,PR,2,,,,"Chaussures noires des hommes",2010-03-01,2008-08-01,en_CA,en_CA,blk_shoe_2
ENDOFDATA
```

Bilingual Content: The Contractor must provide the catalogue in both Official Languages (English and French). The Contractor is required to include two lines for each unique product or service: one in English and one in French.

The quality of the product and services information provided in one language shall be comparable to the product and services information in the other.

Image Files: The Contractor must provide an image file for each Supplier Part ID. The image must be in .JPEG format with a maximum size of 1MB.

Catalogue Updates: The Contractor must provide an updated .CIF catalogue to the CRA Contracting Authority when there are catalogue changes.

The Contractor must notify the CRA Contracting Authority and the CRA Acquisition Service Desk, via email, within one (1) business day when a catalogue item becomes discontinued or otherwise unavailable.

The Contractor must notify the CRA Contracting Authority and the CRA Acquisition Service Desk, via email, within one (1) business day when a catalogue item becomes backordered for longer than five (5) business days.

The CRA Contracting Authority will notify the Contractor via email when there are CRA related catalogue changes. In this situation, the Contractor must provide an updated .CIF catalogue within two (2) business days of written notification.

The Contractor must fix catalogue file errors and provide a corrected version within one (1) business day after being notified by the CRA Contracting Authority or CRA SVEC via an email to the Contractor.

If the Contractor must update the catalogue, the updated .CIF catalogue must only contain product line items that are being added, deleted or modified. For deleted line items the Contractor must update the corresponding .CIF data field (i.e. field no. 19) to deleted status by entering a "T". If a product line item is being added or modified, it can simply be added to the .CIF catalogue.

The CRA Contracting Authority will notify the Contractor if and when there are any scheduled catalogue updates. For scheduled catalogue updates, the Contractor must provide the CRA Contracting Authority with the updated .CIF catalogue ten (10) business days before the catalogue changes are scheduled to take effect.

The CRA Contracting Authority must approve the updated .CIF catalogue before the updated catalogue will be made available in Synergy. All catalogue updates, scheduled or otherwise, including changes to pricing, will only go into effect after the CRA SVEC tests the new catalogue and loads it into the production environment.



11. Acquisition Card Charges

All Synergy PCOs must be charged to a CRA Acquisition Card. Synergy uses only one Ghost Card per contract and per Contractor for all PCOs. For security reasons, PCOs sent over the ASN display only a mock acquisition card number. The valid acquisition card number will be provided via telephone to the Contractor during PoSC Testing by the CRA SVEC or the CRA Acquisition Service Desk.

The CRA Acquisition Card is currently a MasterCard provided by Bank of Montreal. At any time during the period of the Contract, including any exercised option period(s), the CRA reserves the right to change its acquisition card type or provider.

Transactions against the Ghost Card must include Level II credit card transaction data, including the PCO number passed to the Contractor over the ASN, maximum of 25 characters, and the GST/HST amount.

The Contractor must verify that the prices are correct on the PCO before shipping the items and charging the acquisition card. If there is a discrepancy between the prices on the PCO and the prices in the Contractor's systems, the Contractor must work with the CRA Acquisition Service Desk to correct the discrepancy. The Contractor must not ship items or charge the acquisition card until the discrepancy is resolved.

The Contractor must only charge for goods that have been shipped and services that have been rendered.

12. Requirements for External Purchase Method

External Purchases are those made by CRA Purchasers by acquisition card outside the Synergy e-commerce solution.

External Purchases may be used by CRA as a:

- Back-up order method when Synergy is unavailable; and/or
- Regular order method for any items that are not currently hosted as a catalogue in Synergy.

The Contractor must receive, confirm, and process orders by one or more of the following methods: email, online, telephone, and facsimile.

The Contractor must provide confirmation of receipt to the CRA Purchaser within one (1) business day for orders placed using the external purchase method. External Purchase Orders placed by the CRA Purchaser must be confirmed by the Contractor in writing.

The Contractor must not accept orders placed using the External Purchase Method for catalogue items without written authorization from the CRA Acquisition Service Desk, the CRA SVEC or the CRA Contracting Authority. Orders placed using the External Purchase Method must be charged to the CRA Purchaser's Acquisition Card, these orders must not be charged to the Ghost Card. The Contractor is not required to provide Level II credit card transaction data for External Purchase Orders.

For goods, the Contractor must include a packing slip with each shipment. The packing slip must specify the Contractor's name, address, and GST/HST registration number, the purchaser name, date the goods were shipped, description of the goods, cost (before tax), tax amount, and total amount of the Order to be charged to the Acquisition Card including applicable taxes.

For services, the Contractor must provide written details of the services provided. The summary must specify the Contractor's name, address, and GST registration number, the PCO number, CRA Purchaser name, date the service was completed, description of the service, cost (before tax), tax amount, and total amount to be charged to the CRA Ghost Card including applicable tax.

13. Ordering and Payment

The Contractor must maintain and support ordering and payment for the entire period of the Contract, including any exercised option period(s).



The Contractor must notify the CRA Contracting Authority and the CRA Acquisition Service Desk of any changes to the ordering and payment processes and systems a minimum of forty (40) business days in advance to allow the CRA to assess their impact on the CRA Synergy Solution.

The CRA, at its sole discretion, may require the Contractor to retest the ordering process and transmission of Level II credit card transaction data against the requirements set out in the Contract.

The Contractor must complete and pass a new round of PoSC testing before the Contractor implements the system changes into production.

The Contractor must ensure that no errors are made when entering Orders into the Contractor's ordering and provisioning systems for external purchase and catalogue orders. If the Contractor does make any errors when entering Orders into the Contractor's ordering and provisioning systems, the CRA can request that the Contractor automate the ASN to Contractor Ordering/Billing System interface. The Contractor shall comply with any such written request of the CRA Contracting Authority within twenty (20) business days of the request.

The Contractor must validate the contents of each PCO and External Purchase Order to ensure accuracy. In the case of a discrepancy between CRA order information in Synergy and the Contractor, the Contractor shall notify the CRA Acquisition Service Desk, within thirty (30) minutes of occurrence.

14. Order and Billing Support

The Contractor must provide CRA order and billing support through a technical support group (helpdesk) that provides:

- A single point of contact for the CRA Acquisition Service desk to report issues regarding maintenance and support services, problem reporting and problem resolution updates;
- A single toll-free telephone number, fax number, and email address.
- Business hours coverage from 8 a.m. to 5 p.m. (Eastern Time), Monday to Friday (excluding Government of Canada holidays).

15. Ordering and System Issues - Incident Classification and Escalation

For all incidents identified by either the Contractor or the CRA, the Contractor must adhere to the response time requirements detailed in Table A: Incident Classification and Escalation Table, below:



Table A: Incident Classification and Escalation

Severity Levels	Description	Response Time and Resolution Time
Severity 1	System outage - The Contractor can neither accept nor process orders.	<p>The Contractor must notify the CRA Contracting Authority as well as the CRA Acquisition Service Desk of a system outage, within thirty (30) minutes of occurrence</p> <p>The Contractor must also issue progress reports and maintain communication (verbal and email) with the CRA Contracting Authority and CRA Acquisition Service Desk every two (2) hours until problem resolution, within business hours (8AM to 5PM Eastern Time, Monday to Friday (excluding Government of Canada holidays)).</p>
Severity 2	The system is operational, but with severely restricted functionality or degradation. For example, the Contractor cannot process acquisition card charges.	<p>The Contractor must immediately notify the CRA Contracting Authority as well as the CRA Acquisition Service Desk if the system functionality becomes severely restricted or degraded.</p> <p>The Contractor must also issue a verbal and email progress report and maintain communication with the CRA Contracting Authority as well as the CRA Acquisition Service Desk every business day until problem resolution.</p>
Severity 3	The system is operational, but with functional limitations or restriction not critical to the overall operations. Examples include billing errors, spelling mistakes in item descriptions or other non-critical catalogue issues, etc.	<p>The Contractor must notify the CRA Contracting Authority as well as the CRA Acquisition Service Desk if the system functionality becomes restricted, within thirty (30) minutes of occurrence</p> <p>The Contractor must also issue an email progress report and maintain communication when requested by the CRA Contracting Authority or the CRA Acquisition Service Desk.</p>

For all other incidents not classified as Severity Levels one through three, identified by the CRA Acquisition Service Desk, will be assigned an Issue Tracker number, which will be communicated via email to the Contractor. The Contractor must action and resolve the issue within five (5) business days. Upon resolution, the Contractor must reply to the initial email with problem resolution details.

Problems which have not been actioned within five (5) business days of notification will be escalated to the CRA Contracting Authority for further action.



ANNEX F: PROOF OF SYNERGY COMPLIANCE TESTING (POSC)

The Bidder must meet the following requirements for the Proof of Synergy Compliance Testing (PoSC).

The Bidder must:

- Be a member of the Ariba Supplier Network (ASN) and have an ASN Test Account <http://supplier.ariba.com>;
- Supply the CRA with a catalogue in the required format;
- Accept the CRA's Acquisition Card;
- Be able to process Level II credit card transaction data; and
- Provide the CRA with an email address for Order returns and exchanges (where applicable).

The following table outlines the phases and responsibilities for the CRA PoSC Test.

PoSC Test Phases	Description	Owner	Other Participants
Kick-Off Vendor Meeting	Meeting to establish vendor enablement requirements and timelines.	CRA Contracting Authority	<ul style="list-style-type: none"> • CRA Contracting Authority • CRA Synergy Vendor Enablement • Coordinator, CRA ITB representative (optional)
ASN Relationship	CRA establishes an ASN relationship with the Bidder via ASN.	CRA Synergy Vendor Enablement Coordinator	<ul style="list-style-type: none"> • Bidder
ASN Test Account Verification	The CRA SVEC verifies the Bidders ASN Test Account number	CRA Synergy Vendor Enablement Coordinator	<ul style="list-style-type: none"> • Ariba Supplier Technical Support
Corporate Accounting System Vendor Set Up	CRA sets-up Bidder in CRA's Corporate Accounting System.	CRA Synergy Vendor Enablement Coordinator	<ul style="list-style-type: none"> • CRA Acquisition Service Desk
Synergy Vendor Set-up	CRA sets-up Bidder.	CRA Synergy Vendor Enablement Coordinator	<ul style="list-style-type: none"> • CRA Acquisition Service Desk
Contract Set-up	CRA sets-up contract terms in Synergy (ACC).	CRA Synergy Vendor Enablement Coordinator	<ul style="list-style-type: none"> • CRA Contracting Authority
Catalogue Build	Bidder provides catalogue in required format.	Bidder	<ul style="list-style-type: none"> • CRA Synergy Vendor Enablement Coordinator • CRA IT representative
Catalogue Review and Edit	CRA reviews catalogue to ensure it meets contracting terms and adds custom CRA data elements.	CRA Contracting Authority	<ul style="list-style-type: none"> • CRA Synergy Vendor Enablement Coordinator



Commodity Code	CRA maps UNSPSC codes to G SIN Codes	CRA Contracting Authority	
Catalogue Hierarchy	CRA creates catalogue hierarchy	CRA Synergy Vendor Enablement Coordinator	<ul style="list-style-type: none"> CRA Catalogue Administrator
Acquisition Card Number	CRA communicates Ghost Card number to Bidder.	CRA Synergy Vendor Enablement Coordinator	<ul style="list-style-type: none"> CRA Acquisition Service Desk
Testing	CRA works with Bidder to test the new catalogue and end-to-end ordering process.	CRA Synergy Vendor Enablement Coordinator	<ul style="list-style-type: none"> Bidder CRA ITB representative
Confirmation of Functionality	Confirmation of Synergy Vendor Enablement and functionality	CRA Synergy Vendor Enablement Coordinator	<ul style="list-style-type: none"> CRA Contracting Authority
Roll-out	CRA configures Synergy and makes catalogue available in Synergy	CRA Synergy Vendor Enablement Coordinator	<ul style="list-style-type: none"> CRA Acquisition Service Desk Bidder

Proof of Synergy Compliance (PoSC) Test

Within five (5) business days of written notification from the Contracting Authority, the CRA will test the Bidder’s ability to conduct electronic transactions with the CRA using the Ariba Supplier Network (ASN). The Bidder must work with the CRA Synergy Vendor Enablement Coordinator (CRA SVEC) during the PoSC test phase. The CRA SVEC’s contact information will be provided with the written notification.

TESTING

The Bidder must work with the CRA SVEC throughout the testing and roll-out phases to ensure all requirements are met, including finalizing the Catalogue content and format, within the period specified below.

The Bidder must demonstrate that they meet the Synergy requirements found in Annex E: Requirements for a CRA Synergy Solution. Within five (5) business days of written notification by the CRA Contracting Authority the Bidder must commence testing of their ability to conduct electronic transactions with the CRA using the ASN. Testing must be finalized within forty (40) business days of the written notification. The testing period may be extended at CRA’s sole discretion.

CRA will conduct testing of the following mandatory functionalities with the Bidder:

- ASN connectivity between Synergy, ASN and the Bidder;
- Communication of Purchase Card Orders and Change Orders to the Bidder via ASN;
- Communication of electronic order confirmations to Synergy via the ASN;
- Communication of backordered or discontinued items to Synergy via the ASN;
- Communication of exchange and return notification to Synergy via email (where applicable);
- Loading of the Bidder’s catalogues by the CRA into Synergy; and

Communication of Level II credit card transaction data.