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PART 1 - GENERAL INFORMATION

1.1 Introduction

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

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

The Annexes include: the Statement of Work; Evaluation, Basis of Payment; Security Requirements Checklist, Insurance Requirements; the Standing Offer Business Volume Report; and the Code of Conduct Certification.

1.2 Summary

Title: Provision of Vocational Rehabilitation Services to Canada Pension Plan Disability Beneficiaries

Employment and Social Development Canada (ESDC), Ontario Region requires Regional Individual Standing Offer(s) to provide Vocational Rehabilitation Services to Canada Pension Plan Disability Beneficiaries in the province of Ontario (broken down into 8 areas).

The Canada Pension Plan disability (CPPD) benefit, delivered by Service Canada on behalf of Employment and Social Development Canada (ESDC), is payable to people who have made enough contributions to the CPP and who are unable to work because of a severe and prolonged physical or mental disability.

The CPPD vocational rehabilitation (VR) program is available on a voluntary basis to selected CPPD beneficiaries (also referred to CPPD clients), whose medical condition has stabilized and who are motivated to return to work.

This is a one (1) year Standing Offer in effect from date of award with an option to extend for two separate and additional one year periods.

As per the Integrity Provisions under section 01 of Standard Instructions 2006, offerors must provide a list of all owners and/or Directors and other associated information as required. Refer to section 4.21 of the Supply Manual for additional information on the Integrity Provisions.

For services requirements, Offerors must provide the required information as detailed in Article 2.3 of Part 2 of the Request for Standing Offers (RFSO), in order to comply with Treasury Board policies and directives on contracts awarded to former public servants.

1.3 Security Requirements

There are security requirements associated with the requirement of the Standing Offer. For additional information, see Part 6 - Security, Financial and Insurance Requirements, and Part 7 - Standing Offer and Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, offerors should refer to the Industrial Security Program (ISP) of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.

1.4 Debriefings

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

PART 2 - OFFEROR INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the Request for Standing Offers (RFSO) by number, date and title are set out in the *Standard Acquisition Clauses and Conditions Manual* (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

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

The 2006 (2014-09-25) Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the RFSO.

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

Delete: 60 days

Insert: 90 days

2.2 Submission of Offers

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

2.2.1 Canadian Content Certification

This procurement is conditionally limited to Canadian services.

Subject to the evaluation procedures contained in the request for standing offer, offerors acknowledge that only offers with a certification that the service offered is a Canadian service, as defined in clause A3050T, may be considered.

Failure to provide this certification completed with the offer will result in the service offered being treated as a non-Canadian service.

The Offeror certifies that:

() the service offered is a Canadian service as defined in paragraph 2 of clause A3050T.

2.3 Former Public Servants

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

Definitions

For the purposes of this clause,

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

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

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

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

Former Public Servant In Receipt of a Pension

As per the above definitions, is the Offeror a FPS in receipt of a pension? YES () NO ()

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

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

By providing this information, Offerors agree that the successful Offeror's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with Contracting Policy Notice: 2012-2 and the Guidelines on the Proactive Disclosure of Contracts.

Work Force Adjustment Directive

Is the Offeror a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? YES () NO ()

If so, the Offeror must provide the following information:

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- 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.

2.4 Enquiries - Request for Standing Offers

All enquiries must be submitted in writing to the Standing Offer Authority no later than five (5) calendar days before the Request for Standing Offers (RFSO) closing date. Enquiries received after that time may not be answered.

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

2.5 Applicable Laws

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

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

PART 3 - OFFER PREPARATION INSTRUCTIONS

3.1 Offer Preparation Instructions

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

Section I: Technical Offer (4 hard copies)

Section II: Financial Offer (1 hard copy)

Section III: Certifications (1 hard copy)

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

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

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

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process Policy on Green Procurement (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, offerors should:

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

Section I: Technical Offer

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

Section II: Financial Offer

Offerors must submit their financial offer in accordance with Annex "C", Basis of Payment. The total amount of Applicable Taxes must be shown separately.

3.1.1 Payment by Credit Card

Canada requests that offerors complete one of the following:

- (a) () Government of Canada Acquisition Cards (credit cards) will be accepted for payment of call-ups against the standing offer.

The following credit card(s) are accepted:

VISA _____

Master Card _____

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- (b) () Government of Canada Acquisition Cards (credit cards) will not be accepted for payment of call-ups against the standing offer.

The Offeror is not obligated to accept payment by credit card.

Acceptance of credit cards for payment of call-ups will not be considered as an evaluation criterion.

Section III: Certifications

Offerors must submit the certifications required under Part 5.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Offers will be assessed in accordance with the entire requirement of the Request for Standing Offers including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the offers.
- (c) The evaluation team will determine first if there are two or more offers with a valid Canadian Content certification. In that event, the evaluation process will be limited to the offers with the certification; otherwise, all offers will be evaluated. If some of the offers with a valid certification are declared non-responsive, or are withdrawn, and less than two responsive offers with a valid certification remain, the evaluation will continue among those offers with a valid certification. If all offers with a valid certification are subsequently declared non-responsive, or are withdrawn, then all the other offers received will be evaluated.

4.1.1 Technical Evaluation

4.1.1.1 Mandatory Technical Criteria
See Annex B - Evaluation

4.1.1.2 Point Rated Technical Criteria
See Annex B - Evaluation

4.1.2 Financial Evaluation

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

4.1.2.1 Firm Price and/or Rates

The Offeror is required to submit firm prices, rates or both that will apply for the entire period of the Standing Offer.

4.2 Basis of Selection

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

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

The rating is performed on a scale of 170 points.

2. Bids not meeting (a), (b) and (c) will be declared non-responsive.
3. The evaluation will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.

-
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%.
 5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.
 6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
 7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a Standing Offer.

4.2.2 Number of Offers

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

4.2.3 Issuance of Offers

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

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

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

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

PART 5 - CERTIFICATIONS

Offerors must provide the required certifications and associated information to be issued a standing offer.

The certifications provided by offerors to Canada are subject to verification by Canada at all times. Canada will declare an offer non-responsive, will have the right to set-aside a standing offer, or will declare a contractor in default in carrying out any of its obligations under any resulting contracts, if any certification made by the Offeror is found to be untrue whether made knowingly or unknowingly during the offer evaluation period, during the Standing Offer period, or during the contract period.

The Standing Offer Authority will have the right to ask for additional information to verify the Offeror's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Standing Offer Authority may render the Offer non-responsive, may result in the setting aside of the Standing Offer or constitute a default under the Contract.

5.1 Certifications Precedent to issuance of a Standing Offer

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

5.1.1 Integrity Provisions - Associated Information

By submitting an offer, the Offeror certifies that the Offeror and its Affiliates are in compliance with the provisions as stated in Section 01 Integrity Provisions - Offer of Standard Instructions 2006. The associated information required within the Integrity Provisions will assist Canada in confirming that the certifications are true.

5.1.2 Federal Contractors Program for Employment Equity - Standing Offer Certification

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

Canada will have the right to declare an offer non-responsive, or to set-aside a Standing Offer, if the Offeror, or any member of the Offeror if the Offeror is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list at the time of issuing of a Standing Offer or during the period of the Standing Offer.

5.1.3 Additional Certifications Precedent to issuance of a Standing Offer

5.1.3.1 Canadian Content Certification

SACC Manual clause A3050T (2014-11-27) Canadian Content Definition

5.1.3.2 Status and Availability of Resources

SACC Manual clause M3020T (2010-01-11) Status and Availability of Resources

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Workers Compensation Certification- Letter of Good Standing

The Bidder must have an account in good standing with the applicable provincial or territorial Workers' Compensation Board.

The Bidder must provide, within 3 days following a request from the Contracting Authority, a certificate or letter from the applicable Workers' Compensation Board confirming the Bidder's good standing account. Failure to comply with the request may result in the bid being declared non-responsive.

PART 6 - SECURITY, FINANCIAL AND INSURANCE REQUIREMENTS

6.1 Security Requirements

1. Before issuance of a standing offer, the following conditions must be met:
 - (a) the Offeror must hold a valid organization security clearance as indicated in Part 7A - Standing Offer;
 - (b) the Offeror's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirements as indicated in Part 7A - Standing Offer;
 - (c) the Offeror must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
 - (d) the Offeror's proposed location of work performance and document safeguarding must meet the security requirements as indicated in Part 7A - Standing Offer;
 - (e) the Offeror must provide the address(es) of proposed site(s) or premises of work performance and document safeguarding as indicated in Part 3 - Section IV Additional Information.
2. Offerors are reminded to obtain the required security clearance promptly. Any delay in the issuance of a standing offer to allow the successful offeror to obtain the required clearance will be at the entire discretion of the Standing Offer Authority.
3. For additional information on security requirements, offerors should refer to the Industrial Security Program (ISP) of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.

6.2 Insurance Requirements

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

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

PART 7 - STANDING OFFER AND RESULTING CONTRACT CLAUSES

A. STANDING OFFER

7.1 Offer

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

7.2 Security Requirements

7.2.1 The following security requirements (SRCL and related clauses provided by ISP) apply and form part of the Standing Offer.

7.2.1.1 SECURITY REQUIREMENT FOR CANADIAN SUPPLIER:

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

7.2.2 Offeror's Site(s) or Premises Requiring Safeguarding

The Offeror must diligently maintain up-to-date, the information related to the Offeror's and individual(s) site(s) or premises, where safeguarding measures are required in the performance of the Work, for the following addresses:

Street Number / Street Name, Unit / Suite / Apartment Number
City, Province, Territory / State
Postal Code / Zip Code
Country

7.2.2.1 The Company Security Officer (CSO) must ensure through the Industrial Security Program (ISP) that the Offeror and individual(s) hold a valid security clearance at the required level.

7.3 Standard Clauses and Conditions

All clauses and conditions identified in the Standing Offer and resulting contract(s) by number, date and title are set out in the *Standard Acquisition Clauses and Conditions Manual* (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

7.3.1 General Conditions

2005 (2014-09-25) General Conditions - Standing Offers - Goods or Services, apply to and form part of the Standing Offer.

7.3.

7.3.2 Standing Offers Reporting

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

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

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

The quarterly reporting periods are defined as follows:

- 1st quarter: April 1 to June 30;
- 2nd quarter: July 1 to September 30;
- 3rd quarter: October 1 to December 31;
- 4th quarter: January 1 to March 31.

The data must be submitted to the Standing Offer Authority no later than ten (10) calendar days after the end of the reporting period.

7.4 Term of Standing Offer

7.4.1 Period of the Standing Offer [Completed at time of Standing Offer issuance]

The period for making call-ups and providing services against the Standing Offer is from July 1, 2015 to June 30, 2016 inclusive. **[One year from date of award]**

7.4.2 Extension of Standing Offer

If the Standing Offer is authorized for use beyond the initial period, the Offeror offers to extend its offer for 2 additional one year periods, from July 1, 2016 to June 30, 2017 and July 1, 2017 to June 30, 2018 **(exact dates to be entered at Standing Offer award)** under the same conditions and at the rates or prices specified in the Standing Offer, or at the rates or prices calculated in accordance with the formula specified in the Standing Offer.

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The Offeror will be advised of the decision to authorize the use of the Standing Offer for an extended period by the Standing Offer Authority ten (10) days before the expiry date of the Standing Offer. A revision to the Standing Offer will be issued by the Standing Offer Authority.

7.5. Authorities

7.5.1 Standing Offer Authority

The Standing Offer Authority is:

Janice Baird
Supply Specialist
Public Works and Government Services Canada
Acquisitions Branch
St. John's, NL

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

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

7.5.2 Project Authority

The Project Authority for the Standing Offer is named at Standing Offer award.

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

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

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

7.5.3 Offeror's Representative [To be completed with bid submission]

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

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

7.6 Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a Public Service Superannuation Act (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada.

7.7 Identified Users

The Identified User authorized to make call-ups against the Standing Offer is Employment and Social Development Canada, Ontario Region.

7.8 Call-up Procedures

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

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

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

NOTE:

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

Example:

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

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

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

Call-ups will be issued as per proportions above.

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

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

Call-ups will be issued as per proportions above.

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

Example:

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

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

7.9 Call-up Instrument

The Work will be authorized or confirmed by the Identified User(s) using form PWGSC-TPSGC 942.

7.10 Limitation of Call-ups

Individual call-ups against the Standing Offer must not exceed \$50,000.00 (Applicable Taxes included)

7.11 Financial Limitation

The total cost to Canada resulting from call ups against the Standing Offer must not exceed the sum of \$250,000.00 (estimated for year one), (applicable taxes excluded) unless otherwise authorized in writing by the Standing Offer Authority. The Offeror must not perform any work or services or supply any articles in response to call ups which would cause the total cost to Canada to exceed the said sum, unless an increase is so authorized.

The Offeror must notify the Standing Offer Authority as to the adequacy of this sum when 75 percent of this amount has been committed, or three (3) months before the expiry date of the Standing Offer, whichever comes first. However, if at any time, the Offeror considers that the said sum may be exceeded, the Offeror must promptly notify the Standing Offer Authority.

Please note: As this is a standing offer, the financial limitation above is an estimate only for year one. Business volume may be higher in the initial year and the option years proposed.

7.12 Priority of Documents

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

- a) the call up against the Standing Offer, including any annexes;
- b) the articles of the Standing Offer;
- c) the general conditions 2005 (2014-09-25), General Conditions - Standing Offers - Goods or Services;
- d) the supplemental general conditions 4008 (2008-12-12), Supplemental General Conditions – Personal Information
- e) the general conditions 2010B (2014-09-25), General Conditions – Professional Services (Medium Complexity);
- f) Annex "A", Statement of Work;
- g) Annex "B", Evaluation;

-
- h) Annex "C", Basis of Payment;
 - i) Annex "D", Security Requirements Check List;
 - j) Annex "E", List of Areas;
 - k) Annex "F", Insurance Requirements;
 - l) Annex "G", Standing Offer Business Volume Report;
 - m) Annex "H", Code of Conduct Certification
 - n) the Offeror's offer dated _____ (*insert date of offer*), (*if the offer was clarified or amended, insert at the time of issuance of the offer. "as clarified on _____" or "as amended on _____" and insert date(s) of clarification(s) or amendment(s) if applicable*).

7.13 Certifications

7.13.1 Compliance

The continuous compliance with the certifications provided by the Offeror with its offer and the ongoing cooperation in providing associated information are conditions of issuance of the Standing Offer (SO). Certifications are subject to verification by Canada during the entire period of the SO and of any resulting contract that would continue beyond the period of the SO. If the Offeror does not comply with any certification, fails to provide the associated information, or if it is determined that any certification made by the Offeror in its offer is untrue, whether made knowingly or unknowingly, Canada has the right to terminate any resulting contract for default and set aside the Standing Offer.

7.13.2 SACC Manual Clauses

SACC Manual clause M3020C (2010-01-11) Status and Availability of Resources
SACC Manual clause M3060C (2008-05-12) Canadian Content Certification

7.14 Applicable Laws

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in

B. RESULTING CONTRACT CLAUSES

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

7.1 Statement of Work

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

7.2 Standard Clauses and Conditions

7.2.1 General Conditions

2010B (2014-09-25), General Conditions - Professional Services (Medium Complexity) apply to and form part of the Contract.

Section 15 Interest on Overdue Accounts, of 2010B (2014-09-25), General Conditions - Professional Services (Medium Complexity) will not apply to payments made by credit cards.

7.2.2 Supplemental General Conditions

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

Protection and Security of Data stored in Databases

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

- a. equivalent protections are given to personal information as in Canada under legislation such as the *Privacy Act*, R.S. 1985, c. P-21, and the *Personal Information Protection and Electronic Documents Act*, S.C. 2000, c. 5, and under any applicable policies of the Government of Canada; and
- b. the laws do not allow the government of that country or any other entity or person to seek or obtain the right to view or copy any information relating to the Contract without first obtaining the Contracting Authority's written consent.

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

2. The Contractor must control access to all databases on which any data relating to the Contract is stored so that only individuals with the appropriate security clearance are able to access the database, either by using a password or other form of access control (such as biometric controls).
3. The Contractor must ensure that all databases on which any data relating to the Contract is stored are physically and logically independent (meaning there is no direct or indirect connection of any kind) from all other databases, unless those databases are located in Canada (or in an

another country approved by the Contracting authority under subsection 1) and otherwise meet the requirements of this article.

4. The Contractor must ensure that all data relating to the Contract is processed only in Canada or in another country approved by the Contracting Authority under subsection 1.
5. The Contractor must ensure that all domestic network traffic (meaning traffic or transmissions initiated in one part of Canada to a destination or individual located in another part of Canada) is routed exclusively through Canada, unless the Contracting Authority has first consented in writing to an alternate route. The Contracting Authority will only consider requests to route domestic traffic through another country that meets the requirements of subsection 1.
6. Despite any section of the General Conditions relating to subcontracting, the Contractor must not subcontract (including to an affiliate) any function that involves providing a subcontractor with access to any data relating to the Contract unless the Contracting Authority first consents in writing.

7.3 Term of Contract

7.3.1 Period of the Contract

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

7.4 Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a *Public Service Superannuation Act* (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada.

7.5 Payment

7.5.1 Basis of Payment

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid in accordance with Annex "C" - Basis of Payment. Customs duties are included and Applicable Taxes are extra.

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.

7.5.1.1 Travel and Living Expenses - National Joint Council Travel Directive

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

All travel must have the prior authorization of the Project Authority.

All payments are subject to government audit.

7.5.2 Limitation of Price

SACC Manual clause C6000C (2011-05-16) Limitation of Price

7.5.3 Multiple Payments

Canada will pay the Contractor upon completion and delivery of units 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.

7.5.4 SACC Manual Clauses

SACC Manual clause C0711C (2008-05-12) Time Verification

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

7.5.5 Payment by Credit Card

The following credit card is accepted: _____.

OR

The following credit cards are accepted: _____ and _____.

7.6 Invoicing Instructions

1. The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.

Each invoice must be supported by:

- a. a copy of time sheets to support the time claimed;
- b. a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;

2. Invoices must be distributed as follows:

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

7.7 Insurance Requirements

The Contractor must comply with the insurance requirements specified in Annex "C". 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.

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xaq031

Client Ref. No. - N° de réf. du client
G9292-164123

File No. - N° du dossier
XAQ-5-38042

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

The Contractor must forward to the Contracting Authority within ten (10) days after the date of award of the Contract, a Certificate of Insurance evidencing the insurance coverage and confirming that the insurance policy complying with the requirements is in force. 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.

7.8 SACC Manual Clauses

SACC Manual clause A9068C (2010-01-11) Government Site Regulations

SACC Manual clause A9285C (2007-05-25) Workers Compensation

SACC Manual clause A7017C (2008-05-12) Replacement of Specific Individuals

Specific Person(s)

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

_____ (Insert name(s) of person(s))
_____ (Insert name(s) of person(s))
_____ (Insert name(s) of person(s))
_____ (Insert name(s) of person(s))

ANNEX A STATEMENT OF WORK

1.0 TITLE: Provision of Vocational Rehabilitation Services to Canada Pension Plan Disability Beneficiaries

2.0 OBJECTIVES:

The objectives to be achieved by the service provider are:

- To provide individualized, reasonable and cost-effective vocational rehabilitation services to pre-approved CPPD beneficiaries who are identified as able to benefit vocationally; and
- To facilitate a return to substantially gainful employment.

3.0 BACKGROUND:

The Canada Pension Plan disability (CPPD) benefit, delivered by Service Canada on behalf of Employment and Social Development Canada (ESDC), is payable to people who have made enough contributions to the CPP and who are unable to work because of a severe and prolonged physical or mental disability. "Severe" means the person is unable to regularly work at any substantially gainful employment. "Prolonged" means the disability is likely to be of an indefinite duration.

The CPPD vocational rehabilitation (VR) program is available on a voluntary basis to selected CPPD beneficiaries (also referred to as CPPD clients), whose medical condition has stabilized and who are motivated to return to work.

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

The two sections of the CPP Regulations that govern the delivery of the vocational rehabilitation program are Section 69 (2) http://laws-lois.justice.gc.ca/eng/regulations/C.R.C.,_c._385/page-27.html?texthighlight=69#s-69 and Section 70 http://laws-lois.justice.gc.ca/eng/regulations/C.R.C.,_c._385/page-27.html?texthighlight=69#s-69.

4.0 SCOPE:

Services are to be delivered with responsibilities shared between the client, service provider and Service Canada VR Case Manager (VRCM). Open communication between all parties is encouraged.

4.1 SERVICE PROVIDER RESPONSIBILITIES:

- To participate in an orientation session regarding the CPPD VR program;
- To assess vocational rehabilitation potential and assess risk of failure and mitigating factors on an ongoing basis;
- To make a recommendation on the rehabilitation potential based on a sound business case including estimated cost of the program;
- To play an objective role throughout the vocational rehabilitation process;
- To implement the vocational rehabilitation plan and recommendations approved by the Service Canada VRCM;
- To ensure that the client's health and well-being are protected at all times;
- To ensure their premises are accessible to CPPD clients;
- To ensure quality performance of the service provider's staff (rehabilitation consultants and job developers) and any third party sub-contractors;
- To ensure that quality services are provided to the client and Service Canada;

-
- To cover all approved expenses for the client's rehabilitation program and submit invoices with receipts to Service Canada for reimbursement in a timely fashion;
 - To explore cost sharing potential with co-insurers;
 - To obtain an updated medical report (on an as needed basis);
 - To inform Service Canada of any staffing changes that may impact service delivery; and
 - To ensure all proposed new staff meets the requirements outlined in section 9.6 and forward the CV and any copies of supporting documents to Service Canada.

4.2 SERVICE PHILOSOPHY:

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

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

4.3 SERVICE PROVIDER STAFF:

Vocational Rehabilitation Consultants

All staff working directly with CPPD clients require security clearance at an enhanced reliability level, and must meet the minimal work experience and educational attainment as defined in the evaluation criteria. Confirmation of education and experience of proposed staff must be submitted to the Technical Authority for approval, as well as, proof of security clearances from Canadian Industrial Security Directorate, prior to commencing vocational rehabilitation service provider responsibilities.

All proposed staff must meet the following minimum certification/education requirements in vocational rehabilitation (VR) to be eligible for further evaluation.

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

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

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

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

5.0 TASKS:

Upon referral from the Service Canada VRCM, the service provider will deliver vocational rehabilitation services while respecting the agreed to roles of each party. The service provider is not to proceed with any intervention or recommendation prior to the approval of the Service Canada VRCM and prior to receiving the contract for services from our department.

It must be noted that the phases outlined below are not always sequential. If it is determined that a client may benefit from skipping a phase, this can only be done by receiving prior approval by the Service Canada VRCM.

When a contract is for financial services only, the service provider will issue a cheque for the amount specified and invoice an hour of professional fees for issuing the cheque.

5.1 ASSESSMENT PHASE:

An initial assessment is required for all clients. If the necessary information is attainable from a co-insurer or an alternate resource wishing to partner, the Service Canada VRCM may determine that their report may be used.

The information collected is required to demonstrate how the disability is affecting the client and if the client is an appropriate candidate for the program. Exploration of the medical, psychological, social, educational and vocational components must be included.

If after the initial assessment, the recommendation is to proceed in developing a Return to Work Plan (RWP), it is mandatory that components of the vocational confirmation / exploration activity be completed. All clients proceeding with the program, except those who are already working in an appropriate occupation, must research and confirm a suitable, realistic occupational goal prior to the approval of the RWP and subsequent interventions.

If further information is required specialized assessments may be recommended.

5.2 PLANNING PHASE:

Upon approval, the service provider will develop an RWP after the completion of the assessment phase.

An RWP must be approved by the Service Canada VRCM prior to the implementation of any intervention. The plan should be re-evaluated and adjusted as necessary.

The RWP must:

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

A revised RWP must be submitted by the service provider when there is a significant change in the client's health status or a significant change to the original plan is recommended, such as a marked change in occupational direction, training and/or cost. Before initiating a revised RWP, contact the Service Canada VRCM to discuss and obtain approval of next steps.

5.3 INTERVENTION PHASE:

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

1. Client Development and Skills Training Activity;
2. Job Search Activity; and
3. Follow-Up and On-the-Job Evaluation Activity.

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

Case management and service coordination will include:

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

6.0. CONSTRAINTS:

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

- The Return to Work Plan cannot be implemented without the authorization of the Service Canada VRCM and concurrence from the client and treating physician; and
- The Service Canada VRCM is responsible for all decisions regarding the client's vocational rehabilitation program and will decide whether the program should continue or not after the review of each report.
- The Service Canada VRCM will determine the frequency of monitoring in consultation with the service provider, the phase of the rehabilitation plan and the need of the client, unless otherwise specified in the contract.
- All correspondence and documents (electronic or otherwise) generated on the case are the property of the Crown and subject to the Privacy Act.
- All requests for information from clients must be forwarded to the Service Canada VRCM who will then respond to the client.

6.1 USE, RETENTION, DISPOSAL AND SECURITY OF INFORMATION

The transmission of a client's personal information is not to be sent by means of e-mail. Rather, such information shall be transmitted by regular mail or courier, or by telephone. Personal client information is to be stored in a secure (i.e.: locked) place on the service provider's premises and is not to leave their secure premises.

1. For the purposes of allowing the service provider to perform the work under the contract, Service Canada shall make available to the service provider, in accordance with the section 69 and 70 of the *CPP* Regulations and other applicable laws governing the protection of information under its control, the following information, which is stored in ESDC's Personal Information Bank (PPU 146).
2. For the purpose of performing the work under the contract, the service provider shall collect, on behalf of Service Canada, any required information as discussed with the Service Canada VRCM.
3. The service provider shall collect the information referred to in section 2 above directly from the individuals to whom that information relates unless the individuals authorise collection from another source.
4. The service provider shall inform the individuals of the purpose of the collection, including any statutory authority for the collection, of their right to refuse to provide any or all of the requested information and any possible consequence of such refusal, and of their right of access and correction.
5. The service provider shall make every effort to ensure the accuracy of the information collected pursuant to section 2 above.
6. Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, the service provider shall not collect, use or disclose the information respectively referred to in sections 1 and 2 except for the purpose of performing the work under the contract.
7. The service provider shall maintain all information referred to in sections 1 and 2 above, and make sure it is only accessible, in Canada.
8. The service provider shall segregate all records containing information referred to in sections 1 and 2 above (whether in electronic formation or in hard copy) from its other records, and keep all databases in which such records are to be maintained physically independent from all other database, directly or indirectly, which is located outside Canada.

9. The service provider shall ensure that all aspects of the processing of information referred to in section 1 and 2 above are conducted and only accessible in Canada.

10. The service provider shall take all necessary measure to ensure that every person it hires, or the services of whom it retains to fulfil its obligations under this contract, knows and complies with all the terms and conditions of this contract with respect to the protection of information referred to in section 1 and 2 above.

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

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

13. The information referred to in sections 1 and 2 above is protected by the *Privacy Act* and any other applicable federal laws governing the protection of personal information held by federal institutions. That information shall be treated as such by the service provider in accordance with the HRSDC Security Policy and Procedures Manual, the Government of Canada Security Policy or other instructions that HRSDC may issue.

14. Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, the service provider shall not make any copies of the information referred to in sections 1 and 2 above except with the written consent of Service Canada.

15. Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, upon expiry or termination of the contract, whichever is earlier, the service provider shall (return to Service Canada) the information (paper or electronic) referred to in sections 1 and 2 above copies thereof, if any. All paper files are to be sent back to the department following Protected B security (via mail: double enveloped, gum-sealed, with no security marking on the outer envelope). If electronic files exist, they are to be sent back to the department following Protected B security (as indicated above). They are to burn all information onto a CD - one CD per client.

7.0 OUTCOMES / DELIVERABLES:

All reports must include required outcomes and deliverables as described below. They must be submitted on service provider company letterhead and be signed by an eligible vocational rehabilitation consultant as described in section 4.3.

Assessment Phase:

Initial Assessment Reports: Must be submitted within 30 calendar days of referral. All correspondence and documentation obtained and/or generated for the assessment must be attached to the report. (See Appendix "B")

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

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

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File No. - N° du dossier
XAQ-5-38042

CCC No./N° CCC - FMS No./N° VME

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

Planning Phase:

Return to Work Plan (RWP): A draft RWP must be submitted within two weeks of the completion of the vocational exploration/confirmation phase and must be approved by the Service Canada VRCM prior to obtaining stake-holder signatures. The RWP must be signed by all stake-holders prior to the implementation of any intervention. (See Appendix "D")

Revised Return to Work Plan (RRWP): must be submitted when there is a significant change in the client's health status or a significant change to the original plan.

Intervention Phase:

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

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

The Service Canada VRCM may request a status report in specific circumstances i.e. when the level of expenditure has reached a certain limit.

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

Return to Work Follow-up Report: a minimum of one report must be submitted at the end of the sixth week of the three month work trial period (additional reports may be required by the Service Canada VRCM). Must include details of the job (type/earnings), an evaluation of performance by the supervisor (if appropriate) and client, identification of problems/issues, and recommendations. (See Appendix "H": Return to Work Follow-up Report)

Closure Report: must be submitted within within the same month of termination of vocational rehabilitation services. Content must include an overview of complete RWP activities and outcomes, evidence of client capacity or incapacity to return to a substantially gainful occupation (SGO) and recommendations if SGO not attainable as well as total invoiced costs. **All outstanding Invoicing must be submitted with the final report.** (See Appendix "I": Closure Report)

Quarterly:

Quarterly Progress Report: must be submitted within 2 weeks of the last working day of each quarter. The quarterly report is an administrative report used by the Service Canada VRCM to assess the level of expenditure in relation to service provider limitation on expenditure and to reconcile Service Canada's statistical/financial data with the service provider's statistical/financial data. This report will include statistical information up to the last working day of each quarter – June, September, December and March. (See Appendix "J": Quarterly Administrative Report).

7.1 INVOICING METHOD

All itemized invoices are carefully reviewed to ensure the integrity of the CPP fund. Invoices must be on company letterhead. They should be formatted similar to, and must include the content described on the General Invoicing template (see Appendix "K"). Invoices should be submitted along with each progress report unless otherwise negotiated with the Service Canada VRCM.

Service providers must send in original invoices or certified copies of invoices as per the Treasury Board guidelines of Directive on Delegation of Financial Authorities for Disbursements: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=17060§ion=text>. A certified copy is one that is: stamped by the service provider indicating that: "this is a true copy of the original", signed, and dated by the service provider.

Payments will not be processed using "uncertified" copies. If a certified copy of the invoice is submitted, there must be a signed statement by the service provider on the photocopy indicating that it is a true copy of the original and that the original is being kept on their client file. **Original receipts must be retained by service providers for audit purposes**, and should be kept a minimum of one (1) year beyond the end of the contract.

Service Canada will not pay for services which have not been pre-approved by the Service Canada VRCM and/or are not within the scope of the RWP.

The government fiscal year runs from April 1 to March 31 of every year. Therefore, all work performed prior to March 31 **must be** submitted for payment before March 31 of that fiscal year.

8.0 FEE PER SERVICE AND HOURLY RATES

Service Providers will be paid their contracted fee per service **only** for services that are provided by **approved** rehabilitation consultants. All administrative duties performed by the approved rehabilitation consultant are to be included in the contracted fee per service.

For financial services and travel time, hourly professional rates may be charged.

8.1 DISBURSEMENT AND TRAVEL EXPENSES

Disbursements will be reimbursed at cost with no mark-up. Invoices must be itemized and should be submitted **every** 6 weeks. Disbursements are any charges approved in advance by the Service Canada VRCM and deemed eligible in the statement of work. All disbursements submitted for reimbursement require receipts.

Disbursement for clients may include the following expenses:

- ◆ Training/Tuition on a semester basis;
- ◆ Transportation for client (parking, bus passes, etc...);
- ◆ Books/software for training;
- ◆ Physician reports;
- ◆ Specialized assessments;
- ◆ Licensing, certification costs;
- ◆ Cost of examination;
- ◆ Cost of assistive devices;
- ◆ Work hardening programs, job coaching;
- ◆ Postage, faxing and long distance calls as per the RWP.

Service provider's travel costs will be paid up to, but not exceeding, Treasury Board Travel Rates in effect at the time of travel. Service Provider travel expenses must be itemized on a Travel Expense Claim,

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signed by the consultant and submitted with the appropriate invoice. Professional travel time will be reimbursed at the hourly professional rate.

Necessary travel incurred by clients for program assessments and appointments, as well as cost for transportation to work settings and/or educational institutions will be reimbursed as negotiated with the Service Canada VRCM. Consultation with and pre-approval by the Service Canada VRCM is required.

9.0. PERFORMANCE OUTCOMES:

Service Canada will evaluate service provider performance based on client success outcomes and quality of service. Service providers will receive feedback on quality of service from Service Canada on an as needed basis. Any issues will be addressed in writing by Service Canada immediately and corrective action will be expected by the service provider. If a service provider does not comply with the terms and conditions of the contract, Service Canada reserves the right to transfer clients to another service provider.

ANNEX B EVALUATION

1. TECHNICAL BID EVALUATION

MANDATORY CRITERIA

- The bidder is required to provide services in both official languages for Area 7 which consists of Cochrane, Sudbury, Greater Sudbury, Manitoulin and Algoma.

- All staff working directly with CPPD clients require security clearance at the enhanced reliability level.

- Vocational Rehabilitation Consultants

All staff proposed by the bidder must meet the following minimum certification/education requirements in vocational rehabilitation (VR) to be eligible for further evaluation.

- University degree or a diploma in Social Sciences, Health Sciences, Human Services or Vocational Rehabilitation;
- Minimum of two years experience* in the provision of Vocational Rehabilitation services.

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

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

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

RATED EVALUATION CRITERIA:

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

Criteria	Maximum Points
1) Education/training/certification: VR Consultant	25 points
2) Related Experience of Proposed: VR Consultant(s)	55 points
3) Demonstrated ability to provide immediate and in person services	20 points
4) Demonstrated Network for Specialized Assessments	10 points
5) Case Studies (see Appendix A)	40 points
6) Past performance References	20 points

Total

170 points

In order to be considered for contract award technical proposal must score a minimum of 70% of the maximum points available (ie minimum points required = 119). Proposals which fail to score the minimum 70% will be declared non-responsive and not considered further.

TECHNICAL PROPOSAL:

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

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

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

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

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

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

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

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

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

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

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

2. FINANCIAL BID EVALUATION

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

**ANNEX C
BASIS OF PAYMENT/FINANCIAL EVALUATION**

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

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

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

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

INITIAL PERIOD: July 1, 2015 to June 30, 2016
OPTION PERIOD I: July 1, 2016 to June 30, 2017
OPTION PERIOD II: July 1, 2017 to June 30, 2018

FOR THE PURPOSE OF EVALUATION, ALL RATES ARE EXCLUSIVE OF GST/HST AS APPLICABLE				
Geographic Service Area being bid on: _____				
Please refer to the list of Areas attached and specify the Area for which you are bidding.				
Work Location from which services in Geographic AREA will be offered: _____				
CATEGORY OF SERVICE Identified in Statement of Work	FIRM HOURLY RATE/FLAT RATE Initial Period (A)	FIRM HOURLY RATE/FLAT RATE Option Period I (B)	FIRM HOURLY RATE/FLAT RATE Option Period II (C)	AGGREGATE TOTAL (A+B+C)=D
6.1.1 Initial assessment Flat Rate				
6.1.2 Vocational confirmation Flat Rate				
6.1.3 Specialized Assessments Flat Rate				
6.2.1 Return to Work Plan (RWP) Flat Rate				
6.2.2 Revised RWP Flat Rate				
6.3.1 Client Development and Skills Training Firm Hourly Rate				
6.3.2 Job Search activity d) preparation				

Firm Hourly Rate				
6.3.2 Job Search activity e) assistance Firm Hourly Rate				
6.3.2 Job Search activity f) placement Firm Hourly Rate				
6.3.3 Follow up and on the job evaluation activity Firm Hourly Rate				
9.4 Reports d) progress Flat Rate				
9.4 Reports e) return to work Flat Rate				
9.4 Reports f) closure Flat Rate				
Financial Services Firm Hourly Rate				
AGGREGATE TOTAL (D)				

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

Section 6.1.3 Specialized assessments

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

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

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

Type: _____ Rate: _____

Type: _____ Rate: _____

Type: _____ Rate: _____

2. Financial Services and Travel Time

To be billed at the Financial Services firm hourly rate and must have pre-approval by the Service Canada VRCM.

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ANNEX D
SRCL

To be distributed as an electronic attachment on GETS.

ANNEX E

List of Areas

Area 1

- Essex
- Lambton
- Middlesex
- Perth
- Chatham-Kent
- Elgin
- Norfolk
- Oxford

Area 2

- Bruce
- Grey
- Huron

Area 3

- Simcoe
- Parry Sound
- Muskoka
- Haliburton
- Kawartha Lakes
- Nippissing
- Timiskaming
- Northumberland
- Peterborough

Area 4

- Halton
- Dufferin
- Wellington
- Waterloo
- Brant
- Hamilton
- Niagara
- Haldimand

Area 5

- Peel
- York
- Toronto
- Durham

Area 6

- Renfrew
- Ottawa
- Prescott and Russell
- Stormont, Dundas and Glengarry
- Leeds and Grenville
- Lanark
- Lennox and Addington
- Frontenac
- Hastings
- Prince Edward

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Area 7

- Cochrane
 - Sudbury
 - Greater Sudbury
 - Manitoulin
 - Algoma
-

Area 8

- Kenora
- Rainy River
- Thunder Bay

ANNEX F INSURANCE REQUIREMENTS

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

For 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.

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.

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ANNEX G QUARTERLY REGIONAL INDIVIDUAL STANDING OFFER BUSINESS VOLUME REPORT

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

Quarterly periods are defined as follows:

1st quarter: 01 April to 30 June;

2nd quarter: 01 July to 30 September;

3rd quarter: 01 October to 31 December;

4th quarter: 01 January to 31 March.

All data fields of the report must be completed as requested. If some data is not available, the reason must be indicated in the report. If no goods or services are provided during a given period, the Offeror must still provide a "NIL" report.

Failure to provide fully completed reports in accordance with the above instructions may result in the setting aside of the Standing Offer and the application of a vendor performance corrective measure.

Supplier's Name								
Standing offer Title / Description								
Standing Offer Number								
Reporting Period (Fiscal Year & Quarter)								
Total \$ Value of Orders for the Reporting Period (incl. HST)								
Total \$ Value of Orders for the Fiscal Year to Date (incl./HST)								
Call up Detail by ordering Department								
Department or Agency	P/N	ITEM DESCRIPTION				QTY	UNIT	Total

The required information for this Standing Offer must be e-mailed to the following address:
janice.baIRD@pwgsc.gc.ca

ANNEX H

INFORMATION FOR CODE OF CONDUCT CERTIFICATION

(TO BE COMPLETED BY OFFEROR)

Please provide list of names of the following entities, according to the ownership nature of the company

1. For a Corporation - each current member of the Bidder's Board of Directors;

2. For a Sole Proprietorship or an individual doing business under a firm name - the name of the sole proprietor or individual;

3. For a Joint Venture - the names of all current members of the Joint venture;

4. For an individual - the full name of the person

Appendix A Hypothetical Case Study

Male client age 37, separated with one child age 2, completed grade 12 and on the job training. He presently resides with his parents. He last worked as a welder in the maintenance department prior to stopping work in 2008 because of a motor vehicle accident. CPPD benefits granted August 2008.

Referral Source: Local employment counsellor.

Financial Status: Client's sources of income include CPP disability benefits of approximately \$963.67. The disabled contributor's child benefit is paid to his ex-spouse. He resides with his parents.

Medical History:

Mr. Black applied for CPP disability benefits in February 2009. He stopped work in August 2008 as a welder when he was involved in a motor vehicle accident and suffered a closed head injury, a right acetabular fracture, a sciatic nerve injury and a pneumothorax. He received several surgeries and extensive rehabilitation through a local rehabilitation center. He has a leg length discrepancy and ongoing cognitive issues. He has also developed anxiety and depression since his accident.

Current Status:

Mr. Black feels physically fit. He attends gym on a regular basis. His driving privileges were recently reinstated. He feels that returning to work would improve his mental status. He has been seeing an employment counsellor specialized in head injuries. Mr. Black indicates he would like to return to work in his last employment as a welder for the Georgian College. He states he is not ready to retire at age 37 and wants to go back to his previous job. Client stated he had spoken to people at work and his union who felt he was employable. The client's employment counsellor indicates that he has come a long way since his initial injury, that he is a fighter, and that he has gone through leaps and bounds to come this far. Employment counsellor asks if CPPD VR can pay for client's retesting to regain his permits to operate heavy equipment. Mr. Black refused to consider other options as he has worked as a welder all his life and earned over \$30 an hour.

A referral is initiated to a rehabilitation consultant for an initial assessment and recommendations for a RTW plan.

During the course of the initial assessment, additional information is forwarded from the Service Canada Vocational Rehabilitation Case Manager to the rehabilitation consultant. This consisted of a neuropsychological assessment that was performed in August 2011 in order to reassess the client's cognitive function at maximal medical recovery. The neurophysiologist indicated that Mr. Black had made progress and is now independent in all of his activities of daily living. She explained the client is now able to drive. However, he continued to require assistance from his parents to manage his finances and to care for his son on weekends. She stated the client is physically well and has made some progress cognitively. The specialist explained that neuropsychological testing revealed the client continued to show impairments in attention and executive functions. Although there was improvement in comparison to previous testing, there remained consistent struggles in working memory and processing of information in a quick and consistent manner. Weakness in attention and processing speed negatively impacted on learning new information. The client also lacked insight. As well, he had a residual dysfunction in fine motor movements affecting his predominantly left upper extremity. The neurophysiologist recommended vocational counselling. However, she explained that neuropsychological testing does not translate results as to whether a person can perform a set of skills required for a certain occupation.

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The Service Canada Vocational Rehabilitation Case Manager also forwarded notes from a recent conversation with the client during which the client was very irate due to ongoing litigations with his ex-spouse regarding custody of his son.

APPENDIX "B"
INITIAL ASSESSMENT REPORT

Client Name:	Service Provider:	Date of Report:
Client SIN:	Consultant:	Date of Interview with Client:
Client Address:	Service Provider Phone #:	Date of Interview with Employer (if applicable):
Client Phone Number:	Date of Referral:	Date of Interview with Physician (if applicable):

Diagnosis:

Specific Reason for Referral:

Please ensure your report addresses the areas identified below:

1. Psychosocial Profile

Subjective:

- General impression of the client
- General attitude of the client
- Motivation: what are the incentives, disincentives to return to work (RTW)
- Cognitive status
- Emotional status

Objective:

- Client personal and vocational goals
- Client perceived level of disability/capacity
- Support available
- Family situation and obligations

2. Description of client's home environment

- Family situation (including obligations and available supports)

3. Medical and Rehabilitative interventions

(May be contained in physician report)

- Main and secondary diagnosis(es)
- Recent medical interventions including client's compliance and response
- Past and current rehabilitation including client's compliance and response
- Change in medical status since benefits granted
- Prognosis: potential for "Medical instability"
- Signed letter by Physician

**APPENDIX "B" (cont.)
INITIAL ASSESSMENT REPORT**

- Special considerations, restrictions to RTW
 - List of current medications taken by client
 - Need/use of assistive devices
- 4. Education/Vocational Profile**
- Previous testing (aptitude, interest, vocational, etc.) results and/or interpretation if available
 - Previous VR activities and programs
 - Formal and informal education, course, certificate, dates of completion
 - All previous work experience (occupations, duration, salary, job descriptions)
 - Transferable skills
 - Client vocational goals, expectations of a return to work program
 - Employer's willingness to accommodate the client, provide alternative work, proposed schedule and salary (if applicable)
 - Employability profile: academic skills, personal management skills, teamwork skills
 - Interests, hobbies and volunteer work
 - Volunteer work
- 5. Financial situation**
- Revenues and expenses from other sources
 - Coverage under other Programs (Student Loan, EI Program, WCB, Long-Term Disability Insurers, Auto Insurer, Social Assistance, etc.)
- 6. Functional Status**
- Provide a description of the client's past and current functional level based on the client, physician and employer (if applicable) interviews (report of employer interview to be attached if applicable) clarifying the type of impairment affecting the client and how it affects current activities: self-care work and leisure, transportation, childcare, etc.
 - List those barriers to employment and identify those that can be decreased/minimized
 - Identify whether or not the client's goals are realistic and within the CPPD Vocational Rehabilitation Program mandate
- 7. Employer interview (if applicable)**
- Brief description of the activities performed in the client's own job and whether it is still available
 - Accommodations the employer is willing to make, if necessary
 - Availability of alternate work
 - Client's work attitude and attendance
- 8. Partner interview**
- Overview of planning and/or assessments done to date
 - Cost sharing opportunity

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- Type of resource available
 - Information sharing

Recommendations:

Prior to making any recommendations for further service or intervention, please state clearly your opinion regarding the client's rehabilitation potential. For example:

- a. The client has rehabilitation potential and is likely to succeed with minima intervention;
- b. The client has some rehabilitation potential but may require more extensive intervention due to identified barriers;
- c. The client's potential is not clear and needs further exploration; or
- d. The client has no rehabilitation potential and should not participate in the program

Provide an explanation for your recommendation and justify the need for CPPD investment in a Vocational Rehabilitation Program.

Provide your opinion regarding whether or not the client remains totally disabled from performing any substantially gainful occupation, and your impression of his/her abilities.

Provide recommendations, with rationale, for activities required for next reporting period with estimated costs.

Consultant Signature

Date

APPENDIX "C"
Labour Market Analysis

Client Name:	Service Provider:
Client SIN:	Consultant:
Client Address:	Service Provider Phone #:
Client Phone #:	Date of Report:

All labour market research was conducted on _____ (or) between _____ and _____.

Researched Positions

(It is expected that three companies will be contacted by the service provider and three by the client)

Position:	Company:
Contact:	Location:
Qualifications & Responsibilities:	Physical Requirements:
Tools & Equipment Utilized:	Travel Requirements:
Security Clearance Required (yes or no):	Salary Range:
Company Benefits	Hours:
Available Positions (past, current, predicted)	Accessibility:

Repeat above group of headings for each company contacted.

Summary: *(Address whether the job market in the client's area of residence, as per the information gathered above, supports his/her career choice)*

Enclosures: Client's labour market research and job postings.

Consultant Signature

Date

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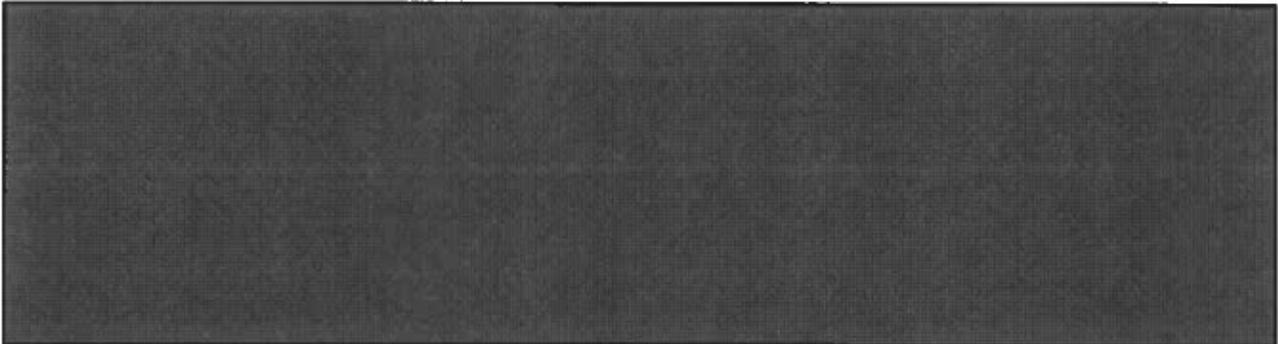
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APPENDIX "D"
Return to Work Plan (RWP)

Client Name:	Service Provider:
Client SIN:	Consultant:
Client Address:	CPPD VRCM:
Client Phone #:	Service Provider Phone #:
Previous Occupation:	Date of Report:
Education:	
Future Job Expectations:	

Vocational Rehabilitation Short & Long Term Goals :



**APPENDIX "D" (cont.)
Return to Work Plan (RWP)**

Date:			Revised Date:		
Client Name:			SIN:		
Objective	Services/ Strategies Required	Provider	Cost	Start Date	End Date
Funding					
Partner: \$		CPPD benefits: \$		Total Cost (not including	
Contractor: \$		VR Expenses: \$		CPPD benefits or partner	
(Service Fees)		(Disbursements)		Contributions): \$	
Additional Comments:					
<ul style="list-style-type: none"> ▪ Following the completion of your study program, a job search period and/or work trial may be granted. Your CPP Disability benefits could continue to be paid during such time at the discretion of the Vocational Rehabilitation Case Manager (VRCM). ▪ You must notify your case manager of any changes in your life situation (medical condition, school, employment, address and telephone number) which could potentially compromise your vocational rehabilitation plan. ▪ In the event that you decide not to comply with your Return to Work Plan (RWP) which you have signed, you could risk losing the vocational rehabilitation services provided by CPP. 					
Total Projected Costs:					
<i>I agree to comply and take responsibility for my vocational rehabilitation plan. I understand the plan may change as required throughout the process and maybe subject to further review and signatures.</i>					
Client Signature:			Date:		
Consultant Signature:			Date:		
CPPD Vocational Rehabilitation Case Manager Signature:			Date:		
<i>I agree with the vocational rehabilitation plan as outlined. There are no medical concerns re: the client's active participation in this vocational rehabilitation plan.</i>					
Physician's Signature:			Date:		
Comments					

**APPENDIX "E"
PROGRESS REPORT**

Client Name:	Service Provider:
Client SIN:	Consultant:
Client Address:	Service Provider Phone #:
Client Phone #:	Date of Last Report:
Current Phase: (Assessment, Planning, Intervention)	

NOTE: Do not repeat information contained in previous reports or in the referral information.

1. List of all activities performed since the last progress report and date for each activity (the date for billable activities should match the date on the invoice).
2. Summary of Contacts:
 - Client
 - Employer
 - Physician: all medical and disability related information provided by the treating physician should be confirmed in writing and should include a date and the signature of the physician.
 - Others
3. Job Development/Placement Activities:
 - List specific employers contacted
 - Job and salary information
 - Employer response/outcome
4. Community resources used during the reporting period.
5. Degree of client's follow through and cooperation comment on the interest, motivation and specific efforts initiated by the client.
6. Barriers emerging which may delay the rehabilitation process and actions taken/recommendations.
7. Evidence of capacity or incapacity to work.
8. Next significant milestones for client.
9. Projected costs to complete the case.
10. Specific recommendations.
11. Justification for change in vocational rehabilitation cost and/or plan.
12. Assessment on successful outcome.
13. Outcome.
14. Service Canada Vocational Rehabilitation Case Manager action requested.

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Consultant Signature

Date

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APPENDIX "F"
JOB SEARCH AGREEMENT

Original _____ Revised _____ If Yes, Revision # _____ Date: _____

Client Name:	CPPD Vocational Rehabilitation Case Manager:
Client SIN:	Consultant:
Phone #:	Phone #:

As a component of (*client's name*) active participation in Canada Pension Plan's (CPP) Disability Vocational Rehabilitation Program, CPP has agreed to sponsor (*client name*) in a _____ month job search facilitated by (*Service Provider's name*) from (*date*) to (*date*).

(*Client's name*) will be provided Employer Contact Sheets by (*Service Provider*) in order to document job search efforts on a bi-weekly basis. (*Client's name*) is expected to contact a minimum of _____ employers per day (_____ employers per week) and to submit these to (*Service Provider*) every two weeks.

(*Client's name*) agrees to focus job search efforts in the following occupations: (list occupation(s) here).

(*Service Provider's name*) agrees to ongoing regular weekly communication with (*client's name*) to assist with the Job Search process. This assistance may include the provision of additional copies of résumés and cover letters when required, the identification of potential employers and job opportunities (and/or sources where these can be obtained) as well as ongoing job search support throughout the job search period.

Should (*client's name*) be successful in his/her efforts to secure paid substantially gainful employment within the _____ month job search period his/her disability benefits will be extended during a work trial for a minimum of three months. (*Client's name*) agrees to inform (*Service Provider's*) of all employment and employment-related earnings obtained during the job search and work trial period.

I agree to comply with the conditions outlined above and to take responsibility for carrying out my own job search to the best of my ability.

Client Signature:	Date:
Service Provider's Signature:	Date:
CPPD Vocational Rehabilitation Case Manager:	Date:

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APPENDIX "G"
EMPLOYER CONTACT SHEET

Client Name _____ SIN: _____

Date	Contact Type (phone, email, fax, in-person)	Company (Name & Address)	Contact Person (phone #)	Call Back	Apply In-Person	Submit Resume or Application	Job Interview or Info Interview
		Name: Address:		Date: Time:	Date:	Date:	Date: Time: Contact:
		Name: Address:		Date: Time:	Date:	Date:	Date: Time: Contact:
		Name: Address:		Date: Time:	Date:	Date:	Date: Time: Contact:
		Name: Address:		Date: Time:	Date:	Date:	Date: Time: Contact:
		Name: Address:		Date: Time:	Date:	Date:	Date: Time: Contact:

APPENDIX "H"
RTW FOLLOW-UP REPORT

Client Name:	Service Provider:
Client SIN:	Consultant:
Client Address:	Service Provider Phone #:
Client Phone #:	Date of Report:

EMPLOYMENT INFORMATION

Employer Name:	Type of Work:
Employer Address:	Nature of Employment: <ul style="list-style-type: none">▪ Continuing/Permanent (full or part-time)▪ Temporary (end date)▪ Seasonal (end date)▪ Self-Employment
Hour of Work (per day – week):	Reason for Part-Time Employment (if applicable): <ul style="list-style-type: none">▪ Client's Choice▪ Labour Market Conditions▪ Client's Work Capacity
Rate of Pay (per hour – week- month):	Date & Reason Work Ceased (if applicable):
Total Monthly Earnings:	

Supervisor Evaluation of Performance (complete only upon direction of Service Canada Vocational Rehabilitation Case Manager)

- Employer Accommodation
- Time loss due to illness (reasons)
- Job demand tolerance

Client Evaluation of Performance

- Employer Accommodation
- Time loss due to illness (reasons)
- Job demand tolerance

Issues identified:

Recommendations:

Consultant Signature

Date

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**APPENDIX "I"
CLOSURE REPORT**

Client Name:	Service Provider:
Client SIN:	Consultant:
Client Address:	Service Provider Phone #:
Client Phone #:	Date of Report:

- 1. Overview of RWP Activities and Outcomes:**
- 2. Evidence of Client's Capacity or incapacity to Return to Substantially Gainful Employment:**
- 3. Where Substantially Gainful Employment is not achievable, provide any additional recommendation:**
- 4. Total Invoiced Costs:**

Consultant Signature

Date

APPENDIX "J"
QUARTERLY ADMINISTRATIVE REPORT

The quarterly report is an administrative report used by CPPD to assess the level of expenditure in relation to Service Provider limitation on expenditure and to reconcile CPPD statistical/financial data with the Service Provider's statistical/financial data. This report will include statistical information up to the last working day of each quarter – June, September, December and March.

The quarterly report should be submitted within 2 weeks of the last working day of each quarter.

1. Active Client Status

For all CPPD clients in progress, please provide the following information on each client, grouping clients by the appropriate Service Provider Rehabilitation Consultants.

- Client's Name
- SIN
- Location: Town and Province
- Nature of Disability
- Status: Active, On Hold, etc.
- Phase:
- Date of Referral to the service provider
- Anticipated Date of Closure and/or Cease:
- Total Estimated Cost of the Program (estimated if rehab not terminated)
- Invoiced Expenditure to Date if Still Active (written approval given by Service Canada Vocational Rehabilitation Case Manager)
- Projected Expenditure Required to Complete the Case
- Total Expenditure in Current Quarter
- Name of Rehabilitation Consultant
- Name of Service Canada Vocational Rehabilitation Case Manager

2. Clients Inactive

- Name
- SIN
- Date of Referral
- Date of Hold/Closure/Cease
- Total Expenditure Billed on the Client

3. Standing Offer Status

- Expenditure (Invoiced Total Costs) from Date of Award to Current Date
- Expenditure (Invoiced Total Costs) in the Current Quarter

Consultant Name
(Please Print)

Name of Service Provider
(Please Print)

Title
(Please Print)

Phone Number

Signature

Date

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APPENDIX "K"
General Invoicing Content

Client Name:	Service Provider:
Client SIN:	Consultant:
Client Phone #:	Service Provider File / Invoice #
CPPD VRCM:	Service Provider Phone #:
	Date of Report:
	Revision (Y/N)

SUMMARY

Total Service Fees to date	\$ _____
Total Disbursements to date	\$ _____
Total Accumulated Fee to Date	\$ _____
<i>(include this invoice for all of the above)</i>	

SERVICES/DISBURSEMENT

Activity	Flat Rate	Hourly Rate Specify hours x rate	Consultant Travel Time Specify hours x rate	Disbursement Specify	Service Fee & HST	Disbursement Fee (at cost)	
Initial Assessment							
Specialized Assessment							
RWP							
Revised RWP							
Vocational Confirmation							
Client Development & Skill Training							
Job Search							
Follow-Up/On-the-Job Evaluation							
Client or Provider Travel Cost							
Report (Specify)							
Financial Services Only							
Other (specify)							
Total Service Fees					\$		
Total Disbursement						\$	
Total Service							

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SIGNATURE _____ DATE _____

Note: A detailed and itemized list is required for all expenses claimed. For all travel expenses please attach a completed travel expense claim invoice form. Original receipts are required. When submitting a revised invoice please indicate "Revised" beside the date at the top. Travel costs will be paid according to Treasury Board Policy.

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Appendix L
Demonstrated Network for Specialized Assessments

(please use as many sheets as required to clearly demonstrate your network)

For Area ___:

Name/proposed company with address and telephone numbers:	Summary of Qualifications:	Services which they will be providing: Neuropsych Intelligence Achievement Job Demand Analysis Functional Capacity Ergonomic Psychovocational Job Modifications Work Samples Other: _____
Name/proposed company with address and telephone numbers:	Summary of Qualifications:	Services which they will be providing: Neuropsych Intelligence Achievement Job Demand Analysis Functional Capacity Ergonomic Psychovocational Job Modifications Work Samples Other: _____