

**RETURN BIDS TO:**

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**Bid Receiving Public Works and Government  
Services Canada/Réception des soumissions  
Travaux publics et Services gouvernementaux  
Canada**

## Cabot Place, Phase II, 2nd Floor

**Box 4600**

**St. John's, NL**

**A1C 5T2**

**Bid Fax: (709) 772-4603**

## Request For a Standing Offer Demande d'offre à commandes

## Regional Individual Standing Offer (RISO)

### Offre à commandes individuelle régionale (OCIR)

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

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

## Comments - Commentaires

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

**Issuing Office - Bureau de distribution**

PWGSC / TPGSC - Nfld. Region  
Cabot Place, Phase II, 2nd Floor  
Box 4600  
St. John's, NL  
A1C 5T2

<b>Title - Sujet</b> Vocational Rehab. Western&Atlantic	
<b>Solicitation No. - N° de l'invitation</b> G9292-177873/A	<b>Date</b> 2017-01-10
<b>Client Reference No. - N° de référence du client</b> G9292-177873	<b>GETS Ref. No. - N° de réf. de SEAG</b> PW-\$XAQ-031-6761
<b>File No. - N° de dossier</b> XAQ-6-39149 (031)	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2017-02-14</b>	<b>Time Zone</b> <b>Fuseau horaire</b> Newfoundland Standard Time NST
<b>Delivery Required - Livraison exigée</b> See Herein	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Baird, Janice	<b>Buyer Id - Id de l'acheteur</b> xaq031
<b>Telephone No. - N° de téléphone</b> (709)772-2999 ( )	<b>FAX No. - N° de FAX</b> (709)772-4603
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> EMPLOYMENT AND SOCIAL DEVELOPMENT CANADA PORTAGE IV LVL 1 140 PROMENADE DU PORTAGE GATINEAU Quebec K1A0J9 Canada	
<b>Security - Sécurité</b> This request for a Standing Offer does not include provisions for security. Cette Demande d'offre à commandes ne comprend pas des dispositions en matière de sécurité.	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

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

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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 and Additional Information: includes the certifications and additional information 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 / Coordination of Vocational Rehabilitation Services to Canada Pension Plan Disability (CPPD) Beneficiaries**

Employment and Social Development Canada (ESDC), requires service providers for the provision and/or coordination of Vocational Rehabilitation Services to Canada Pension Plan Disability Beneficiaries in Atlantic and Western Canada. The regions are broken into specific service areas (as per the list below), which enables the bidder to bid on as many service areas as they deem viable. Public Works and Government Services Canada, on behalf of ESDC, will award multiple Regional Individual Standing Offers for this purpose.

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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. Please refer the Statement of Work at Annex A for complete details of work requirements.

The requirement is limited to Canadian goods and/or services.

The Request for Standing Offers (RFSO) is to establish Regional Individual standing Offers for the requirement detailed in the RFSO, to the Identified Users across Canada, **excluding** locations within Yukon, Northwest Territories, Nunavut, Quebec, and Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirement for deliveries to locations within CLCAs areas within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador will have to be treated as a separate procurement, outside of the resulting standing offers.

#### **AREAS COVERED BY THIS RFSO:**

Bidders may submit offers for multiple areas if deemed viable. Please ensure that your bid clearly identifies which areas you are bidding on.

- Area 1 - Newfoundland and Labrador (entire Province)
- Area 2 - Nova Scotia and Prince Edward Island (entire Provinces)
- Area 3 - New Brunswick (entire Province). **It is expected that the bidder will be able to provide services in both official languages for the province of New Brunswick.**
- Area 4 - Manitoba (entire Province)
- Area 5- Saskatchewan (entire Province)
- Area 6- Alberta
- 6.1 – Medicine Hat, Lethbridge, Calgary, Lake Louise, Banff, Drumheller, Red Deer, Rocky Mountain House and surrounding areas, as well as, East Kootenays in BC.
- 6.2 – Edmonton, Grande Prairie, Peace River, High Level, Jasper, Edson, Fort McMurray and surrounding area
- Area 7- British Columbia
- 7.1 - Greater Vancouver / Fraser Valley (east to Surrey and Port Coquitlam, north to Sechelt and Pemberton and from Maple Ridge/Langley to Hope)
- 7.1b– additional points will be awarded if the bidder indicates willingness to travel to 7.1b : Caribou / Northern BC (Williams Lake area North)
- 7.2- Vancouver Island (including Powell River and the Gulf Islands)
- 7.3- Okanagan (including Kamloops in the west as well as West Kootenays)

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### 1.3 Security Requirements

There are security requirements associated with the requirement of the Standing Offer. For additional information, see Part 6 – Security 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) (<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 (2016-04-04)** 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.

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

### 2.3 Former Public Servant

Former Public Servant - Competitive – Offer

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: an individual; an individual who has incorporated; a partnership made of former public servants; or 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

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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:

- 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 7 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.



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## **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 Newfoundland and Labrador.

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

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## **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 (2 hard copies)

Section III: Certifications (1 hard copies)

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) (<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 the Annex C, Basis of Payment"). The total amount of Applicable Taxes must be shown separately.

**Section III: Certifications** Offerors must submit the certifications and additional information required under Part 5.

#### **Section IV: Additional Information**

##### **3.1.1 Offeror's Proposed Sites or Premises Requiring Safeguarding Measures**

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- 3.1.1.1** As indicated in Part 6 under Security Requirements, the Offeror must provide the full addresses of the Offeror's and proposed individuals' sites or premises for which safeguarding measures are required for Work Performance:

Street Number / Street Name, Unit / Suite / Apartment Number \_\_\_\_\_

City, Province, Territory / State \_\_\_\_\_

Postal Code / Zip Code \_\_\_\_\_

Country \_\_\_\_\_

- 3.1.1.2** The Company Security Officer (CSO) must ensure through the Industrial Security Program (ISP) that the Offeror and proposed individual(s) hold a valid security clearance at the required level, as indicated in Part 6 – Security, Financial and Other Requirements.

## **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.

#### **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.

##### **4.1.2.2 Evaluation of Price**

SACC Manual Clause M0220T (2016-01-28), Evaluation of Price

### **4.2 Basis of Selection**

#### **4.2.1 Basis of Selection - Highest Combined Rating of Technical Merit and Price**

1. To be declared responsive, a bid must:
  - a. comply with all the requirements of the bid solicitation; and
  - b. meet all mandatory criteria; and
  - c. obtain the required minimum of 105 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 150 points.
2. Bids not meeting "(a) or (b) or (c)" will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 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%.

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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 contract.

#### **4.2.2 Number of Offers**

It is anticipated that up to 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 the 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 AND ADDITIONAL INFORMATION

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

The certifications provided by Offerors to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare an offer non-responsive, will have the right to set-aside a standing offer, or will declare a contractor in default 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 will render the offer non-responsive, result in the setting aside of the Standing Offer or constitute a default under the Contract.

### 5.1 Certifications Required with the Offer

Offerors must submit the following duly completed certifications as part of their offer.

#### 5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the [Ineligibility and Suspension Policy](http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Offeror must provide with its offer the required documentation, as applicable), to be given further consideration in the procurement process.

#### 5.1.2 Additional Certifications Required with the Offer

##### 5.1.2.1 Canadian Content Certification

This procurement is limited to Canadian services.

The Offeror certifies that:

( ) the services offered are Canadian services as defined in paragraph 4 of clause [A3050T](#). For more information on how to determine the Canadian content for a mix of goods, a mix of services or a mix of goods and services, consult [Annex 3.6](#) (9), Example 2, of the *Supply Manual*.

##### 5.1.2.1.1 SACC Manual clause [A3050T](#) (2014-11-27) Canadian Content Definition

### 5.2 Certifications Precedent to the Issuance of a Standing Offer and Additional Information

The certifications and additional information listed below should be submitted with the offer, but may be submitted afterwards. If any of these required certifications or additional information 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 provide the certifications or the additional information listed below within the time frame provided will render the offer non-responsive.

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## 5.2.1 Integrity Provisions – Required Documentation

In accordance with the [Ineligibility and Suspension Policy](http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Offeror must provide the required documentation, as applicable, to be given further consideration in the procurement process.

## 5.2.2 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 ) available at the bottom of the page of the [Employment and Social Development Canada-Labour's](http://www.esdc.gc.ca/en/jobs/workplace/human_rights/employment_equity/federal_contractor_program.page?&_ga=1.229006812.1158694905.1413548969) website ([http://www.esdc.gc.ca/en/jobs/workplace/human\\_rights/employment\\_equity/federal\\_contractor\\_program.page?&\\_ga=1.229006812.1158694905.1413548969](http://www.esdc.gc.ca/en/jobs/workplace/human_rights/employment_equity/federal_contractor_program.page?&_ga=1.229006812.1158694905.1413548969)).

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.

## 5.2.3 Additional Certifications Precedent to Issuance of a Standing Offer

### 5.2.3.2 Status and Availability of Resources

SACC Manual clause M3020T (2016-01-28)

### 5.2.3.3 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.

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## **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 sites 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 addresses of proposed sites 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.
2. 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**

#### **Insurance Requirements - Proof of Availability - Prior to issuance of a Standing Offer**

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 D.

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.



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## **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.

#### **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 (PWGSC).
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, attached at Annex G;
  - (b) Industrial Security Manual (latest edition).

#### **7.2.2 Offeror's Sites or Premises Requiring Safeguarding**

**7.2.2.1** Where safeguarding measures are required in the performance of the Work, the Offeror must diligently maintain up-to-date the information related to the Offeror's and proposed individuals' sites or premises for the following addresses:

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

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7.2.2.2 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 (2016-04-04), General Conditions - Standing Offers - Goods or Services, apply to and form part of the Standing Offer.

#### 7.3.2 Standing Offers Reporting

##### Periodic Usage Reports - Standing Offer

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 E. 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 15 calendar days after the end of the reporting period.

### 7.4 Term of Standing Offer

#### 7.4.1 Period of the Standing Offer

The period for making call-ups against the Standing Offer is from April 1, 2017 to March 31, 2018.

Note: A call-up must be made during the period of the standing offer but the work under the call-up can continue beyond the period of the standing offer.

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#### **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 two additional and separate one year periods, at April 1, 2018 and April 1, 2019 under the same conditions and at the rates or prices specified in the Standing Offer, or at the rates or prices calculated in accordance with the formula specified in the Standing Offer.

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

#### **7.4.3 Comprehensive Land Claims Agreements (CLCAs)**

The Standing Offer (SO) is for the delivery of the requirement detailed in the SO to the identified Users across Canada, **excluding** locations within Yukon, Northwest Territories, Nunavut, Quebec, and Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirement for deliveries to locations within CLCAs areas within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador will have to be treated as a separate procurement, outside of the standing offer.

#### **7.4.4 Delivery Points**

Delivery of the requirement will be made to delivery point(s) specified under section 1.2 Summary.

### **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  
John Cabot Building, 7<sup>th</sup> Floor  
10 Barter's Hill  
St. John's, NL A1C 5T2

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 identified in the call-up against the Standing Offer.

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

### 7.5.3 Offeror's Representative

Name: \_\_\_\_\_

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.

### 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

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**NOTE:**

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

**Example:**

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

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

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

Call-ups will be issued as per proportions above.

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

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

Call-ups will be issued as per proportions above.

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

**Example:**

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

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

## **7.9 Call-up Instrument**

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

## **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 \$ \_\_\_\_\_ (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,

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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 (insert date), General Conditions - Standing Offers - Goods or Services
- d) (~~delete if not applicable~~) the supplemental general conditions \_\_\_\_\_; (insert number, date and title)
- e) the general conditions \_\_\_\_\_; (insert number, date and title of the general conditions that will apply to the contract)
- f) Annex A, Statement of Work;
- g) Annex B, Evaluation;
- h) Annex C, Basis of Payment;
- i) Annex D, Insurance Requirements;
- j) Annex E, Quarterly Business Volume Report;
- k) Annex F, Code of Conduct;
- l) Annex G, Security Requirements Checklist;
- i) 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 and Additional Information

### 7.13.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Offeror with its offer or precedent to issuance of the Standing Offer (SO), and the ongoing cooperation in providing additional information are conditions of issuance of the SO and failure to comply will constitute the Offeror in default. 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.

### 7.13.2 SACC Manual Clauses

SACC Manual clause M3020C (2016-01-28) 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 \_\_\_\_\_. (Insert the name of the province or territory as specified by the Offeror in its offer, if applicable).

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## 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 (2016-04-04), General Conditions - Professional Services (Medium Complexity) apply to and form part of the Contract.

**Insert the following clause when payment by credit cards is accepted by the Offeror.**

Section \_\_\_\_\_ (insert section number) Interest on Overdue Accounts, of \_\_\_\_\_ (insert the number, date and title of applicable general conditions) 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.

#### 7.2.3 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.



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

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

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

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

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

### **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.



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#### 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;

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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. Please refer to Appendix J General Invoice Template.

## 7.7 Insurance Requirements

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

The Contractor is responsible for deciding if additional insurance coverage is necessary to 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 prior to 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))

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**OFFEROR CONTACTS:**

**TECHNICAL:**

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

e-mail: \_\_\_\_\_

**INVOICING:**

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

e-mail: \_\_\_\_\_

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## ANNEX A

### STATEMENT OF WORK

#### 1.0 TITLE: Provision / Coordination of Vocational Rehabilitation Services to Canada Pension Plan Disability (CPPD) 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 within each CPPD beneficiaries' capacity and ability.

#### 3.0 BACKGROUND:

The 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, 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 (<http://laws-lois.justice.gc.ca/eng/regulations/C.R.C., c. 385/page-11.html?txthl=68.1#s-68.1>)

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](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](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 provided/coordinated with the goal of assisting the beneficiaries in becoming job ready to seek, obtain and sustain gainful employment. The responsibilities are shared between the beneficiary, service provider and Service Canada's VR Case Manager (VRCM).

#### 4.1 SERVICE PROVIDER RESPONSIBILITIES:

- To participate in an orientation session regarding the CPPD VR program and to adhere to the process explained;
- To ensure that all staff have a current reliability status;
- To ensure that if providing services in an identified bilingual region that the staff who will be delivering the services in French are identified as bilingual;
- To inform Service Canada of any staffing changes that may impact service delivery;
- To ensure that all proposed new staff (including third party sub-contractors) meet the requirements outlined in section 4.3 and forward the CV and any copies of the supporting documents to the PWGSC contact listed;
- To ensure quality performance of the service provider's staff and any third party sub-contractors;
- To maintain open communication between all parties;
- To ensure quality services are provided;
- To play an objective role throughout the vocational rehabilitation process;
- To ensure that when meeting with the beneficiary outside the beneficiary's home that the location is accessible to the beneficiary's disability needs;
- To make a recommendation on the rehabilitation potential based on a comprehensive business case including estimated cost of the program;
- To implement the vocational rehabilitation plan and recommendations approved by the Service Canada VRCM;
- To ensure that the vocational rehabilitation plan does not negatively affect the beneficiary's health and well-being;
- To continually assess the vocational rehabilitation potential, risk of failure and mitigating factors;
- To obtain an updated medical report only when directed by Service Canada;
- To collaborate with the Service Canada VRCM in exploring any cost sharing potential with co-insures or non-profit agencies and securing the agreement in writing;
- To ensure that no services are initiated prior to receiving the individual contract from Service Canada;
- To pay all **approved** expenses for the rehabilitation program and submit invoices with receipts to Service Canada for reimbursement at a minimum every 30 days;
- To monitor the financial status of the beneficiary's specific call-up; and
- To report any additional funds that may be required for the vocational plan as soon as it is identified and to wait for the amended contract (if deemed necessary) before proceeding.

#### **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, regional, and/or national labour markets. A beneficiary's employment options could include a return to the previous position, a modified position, or alternate employment opportunities. In many instances, beneficiaries may need to be re-trained for a new position and the service provider, in collaboration with the VRCM, will ensure quality, timely and cost effective interventions in the development of the vocational plan;
- Services are individualized and tailored to each beneficiary's unique needs;
- Flexibility currently available within CPPD policy and legislation, for example allowable earnings, 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 beneficiaries 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, experience, valid reliability status, as well as, any asset qualifications of proposed staff must be submitted to the Technical Authority for approval. Proof of Document Safeguarding Capability at the Protected B level and Designated Organization Screening at the Protected B from the Canadian Industrial Security Directorate must be submitted prior to commencing vocational rehabilitation service provider responsibilities.

##### **Mandatory Minimum Criteria**

All proposed staff/consultants must meet the following education requirements and work experience to be eligible for further evaluation:

##### **Vocational Rehabilitation Consultants:**

- University degree or a diploma in Social Sciences, Health Sciences, or Human Services; **AND**

- Minimum of two of the last three years of experience\* in the provision of Vocational Rehabilitation services.

Current registration as a Registered Rehabilitation Professional (RRP), Canadian Certified Rehabilitation Counselor (CCRC)/Certified Rehabilitation Counselor (CRC), Certified Vocational Rehabilitation Professional (CVRP), or Masters Level Canadian Certified Counsellor (CCC) will be considered as an asset. Bachelor or higher level university degree in Vocational Rehabilitation will be scored higher.

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 is no staff proposed by a bidder that meets the minimum mandatory requirement described above, the bid shall be considered a failed bid.

\*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.

Note: If a contract has been awarded, the service provider is not permitted to add additional staff to the contract; however, they are permitted to replace staff as long as the proposed staff member meets the requirements.

## **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 as explained in the orientation session. Details of the assessment, planning, and intervention phases will be explained in the orientation session to service providers. 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 assessment, planning, and intervention phases may not always be sequential. If it is determined that a client may benefit by advancing to a phase without completing the previous phase, this can only be done by receiving approval by the Service Canada VRCM.

### **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. It is acknowledged that in rare situations that the service provider may be conducting the assessment at a different location than the client's residence. If pre-approval is received by the Service Canada VRCM the assessment may be conducted by a telephone interview or by using the video conferencing equipment through the local Service Canada office.

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 it is determined that the client is a suitable candidate for the VR program and the recommendation is to proceed in developing a draft Individual Written Rehabilitation Plan (IWRP), the Service Canada VRCM will confirm if some or all components of the vocational confirmation / exploration activity are to be completed prior to the development of the IWRP. For all clients proceeding with the program, except those who are already working in an appropriate occupation, there must be research and confirmation of a suitable, realistic occupational goal prior to the approval of the IWRP and subsequent interventions.

If further information is required in order to determine the client's suitability for the VR program or to further determine the client's needs, specialized assessments may be recommended.

## **5.2 PLANNING PHASE:**

Upon approval, the service provider will develop a draft IWRP after the completion of the assessment phase.

The final IWRP 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 IWRP must:

- be developed in collaboration with all key stakeholders: client, Service Canada VRCM, service provider, physician and co-insurer or other partnering agency (as applicable);
- 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 per fiscal (April 1<sup>st</sup> to March 31<sup>st</sup>) per year;
- include a breakdown of service provider estimated hours of work for each activity paid on an hourly basis;
- include documentation from the training institution that outlines all related training costs;
- include a breakdown of estimated disbursements;
- specify short and long term goals (ensuring that they are measurable);
- identify barriers/problems and ascertain strategies and services needed to reach the goals;
- indicate confirmed dollar amounts of any resources and funding options available to the client;
- identify the responsibilities of the client, Service Canada VRCM and the service provider;
- itemize co-insurer/other partnering agency participation including the financial expectations of each party;



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- first be approved by the Service Canada VRCM before obtaining signatures of the other stakeholders.

An amended IWRP 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. Contact the Service Canada VRCM to discuss the need to amend the IWRP. Obtain verbal approval from the Service Canada VRCM prior to commencing the amended IWRP.

### **5.3 INTERVENTION PHASE:**

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

1. Client Development and Skills Training (job readiness);
2. Job Search; and
3. Follow-Up and On-the-Job Evaluation.

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

Case management and service coordination will include:

- reinforcement of realistic vocational goals;
- promotion of the beneficiary's responsibility in his/her vocational rehabilitation program;
- monitoring progress and maintaining communication with all stakeholders;
- utilization of resources and other funding options;
- coordination of services with co-insurers or other agency partners;
- information gathering;
- medical management, which includes obtaining medical releases as required;
- assistance and support during unanticipated events;
- documentation of the overall IWRP; and
- providing support to the beneficiary.

### **5.4 FINANCIAL SERVICES**

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When a contract is for financial services only, the service provider will cover the costs of disbursements to clients, organizations and businesses. This may include but is not limited to tuition, books, supplies, clothing, employment supports and disability related needs. Upon approval from Service Canada the service provider will issue a cheque for the amount specified and forward the cheque for the prescribed amount. The service provider will invoice Service Canada the disbursement amount and an additional ½ hour of professional fees for cheque writing costs.

#### 6.0. CONSTRAINTS:

- No activity should be initiated beyond the initial assessment without the authorization from the Service Canada VRCM;
- The IWRP cannot be implemented without the authorization of the Service Canada VRCM and concurrence from the beneficiary and treating physician;
- The Service Canada VRCM is responsible for all decisions regarding the beneficiary'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 copies of information from clients are subject to the Privacy Act and must be forwarded to the Service Canada VRCM who will then respond to the client; and
- No "Skyping", "Face Time" or other video chat applications are allowed.

#### 6.1 USE, RETENTION, DISPOSAL AND SECURITY OF INFORMATION

*The transmission of a client's personal information <http://laws-lois.justice.gc.ca/eng/acts/p-21/page-1.html#h-5> (Protected B) is not to be sent by means of e-mail or fax. Rather, such information shall be transmitted by regular mail or courier, or by telephone. Personal client information is to be stored in a secure place as per the Canadian Industrial Security Directorate.*

- 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, information required to assist the beneficiary in their return to work, which is stored in ESDC's Personal Information Bank (PPU 146).

- 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.
- The service provider shall:
  - inform the individual 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.
  - make every effort to ensure the accuracy of the information collected.
  - 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.
  - maintain all information referred to in bullets 1 and 2 above, and make sure it is only accessible, in Canada.
  - segregate all records containing information referred to in bullets 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.
  - ensure that all aspects of the processing of information referred to in bullets 1 and 2 above are conducted and only accessible in Canada.
  - ensure that every person 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 bullets 1 and 2 above.
- 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 bullets 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.
- The information referred to in bullets 1 and 2 above remains at all times under the control of Service Canada.
- The information referred to in bullets 1 and 2 above is protected by the *Privacy Act* (<http://laws-lois.justice.gc.ca/eng/acts/p-21/>) and any other applicable federal laws governing the protection of personal information held by federal institutions.

- 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 bullets 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. This will be arranged in consultation with the Service Canada VRCM.

## 6.2 VALIDATION FOR PHYSICAL SECURITY:

- The Service Provider must comply with the provisions of the Security Requirements Check List (SRCL) and ESDC IT Security Architecture Assessment Document.
- The Service Provider must, at all times during the performance of the Contract/Standing Offer, hold a valid Designated Organization Screening (DOS) with approved Document Safeguarding and Production Capabilities at the level of PROTECTED B, issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
- Use a standalone desktop or notebook computer that is not connected to the Internet while processing sensitive documents.
- In following the 'principle of least-privilege', ESDC must provide to the contractor only the minimum access required for individuals to perform their duties.

## 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. If 30 calendar days is not attainable the service provider may ask for an extension up to a maximum of 60 calendar days. 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 activity-must be submitted within the time frame approved by the Service Canada VRCM.

**Labour Market Analysis (LMA) Report:** Submitted as part of the Vocational Confirmation/Exploration and prior to initiating the IWRP. If requested by the Service Canada VRCM, a copy of the client's labour

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market research must be submitted with the Labour Market Analysis Report. Note: In certain circumstances dependent on the client situation, the Service Canada VRCM may indicate that the LMA Report is not necessary. (See Appendix "C")

**Specialized Assessment Reports:** will only be supported by the Service Canada VRCM when more specific information is needed to further determine a client's rehabilitation potential and/or suitability to continue in the CPPD VR program. All original correspondence, documentation and interpretation, must be submitted two weeks after the completion of the assessment.

**Planning Phase:**

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

**Cost Sharing Agreement:** An agreement between Service Canada and other vested stakeholders regarding the disbursements associated with the IWRP. The agreement is to be signed by the SC VRCM and the stakeholder to ensure the parties paying for the disbursements clearly understand their financial obligation.

**Amended Individual Written Rehabilitation Plan (AIWRP):** must be submitted as directed by the Service Canada VRCM when there is a significant change in the client's health status or a significant change to the original IWRP. The time period to submit the amended return to work plan will be determined as negotiated with the VRCM.

**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 including the dates, client observations, emerging barriers, evidence of capacity or incapacity for work, specific recommendations (and justifications for significant changes), assessment on successful outcome(s), future outcomes and requested actions to the Service Canada VRCM. (See Appendix "E")

During the job search (5.3), a list of specific employer contacts must 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.

**Unpaid or Voluntary Work Placement:** CPPD beneficiaries working with service providers are not permitted to be involved in unpaid or voluntary work as part of their program unless the service provider or the employer has appropriate Workers Compensation or equivalent coverage. Proof of this coverage must be provided to the Service Canada VRCM in advance of any unpaid or voluntary work placement. The service provider is to provide a description of the placement details (job title, start date, work description and the goals to be accomplished during the placement).

**Job Search Agreement:** must be submitted to Service Canada before starting each approved job search period. The agreement must be signed by the beneficiary and the service provider to confirm that the beneficiary is prepared to commence the job search. In consultation with the Service Canada VRCM, the agreement will identify: 1) the duration of the job search period (if after three months it is determined

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that the job search period is required to be extended this will need prior approval from the VRCM) and 2) the number of required weekly employer contacts as confirmed by the Service Canada VRCM. If the beneficiary is successful in their job search, the service provider is to notify the Service Canada VRCM with the employment details (job title, start date, salary/hr, etc...) (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 (title/type/earnings and amount of hours worked on a weekly basis), an evaluation of performance by the supervisor (if appropriate) and client, identification of problems/issues, record of attendance at work (can be provided by the client if the client has not self-disclosed), **copies of the pay stubs** and recommendations. (See Appendix "H": Return to Work Follow-up Report)

**Closure Report:** must be submitted within two weeks from the termination of vocational rehabilitation services. Content must include an overview of complete IWRP activities and outcomes, evidence of beneficiary capacity or incapacity to return to a substantially gainful occupation (SGO), and total invoiced costs. If the beneficiary is not successful with the IWRP, recommendations for next steps as discussed in collaboration with the VRCM are to be included. **All outstanding invoicing must be submitted with the final report.** (See Appendix "I": Closure 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 "J"). Invoices and the accompanying receipts should be submitted along with each disbursement and 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&section=text>. Payments will not be processed using "uncertified" copies.

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. If the service provider is submitting "certified copies", the original must be retained for 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 IWRP.

The government fiscal year runs from April 1 to March 31 of every year. Therefore, to ensure no delays in payment of service provider invoices, the regional Service Canada VRCM will contact the service provider in the last quarter of each fiscal year to provide details regarding the year-end cut-off date for submission of invoices.

## 8.0 HOURLY RATES

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Service Providers will be paid their firm hourly professional rate as per the basis of payment. **No services are to be initiated prior to receiving the individual call up from Service Canada's procurement department.** No services are to go beyond the initial assessment prior to having confirmation from the SC VRCM. Of note: the beneficiary's call up may indicate additional hours to cover unexpected requirements, however, the service provider is to contact the SC VRCM prior to accessing any of the additional hours.

It is to be noted that the Service Provider's hourly rate includes any office expenditures relating to the client file. Example: telephone/fax charges, photocopying fees.

For financial services (i.e. payment of client disbursements) and professional travel time, ½ hour professional rates will be paid.

## 8.1 CLIENT DISBURSEMENT AND TRAVEL EXPENSES

Disbursements will be reimbursed at cost with no mark-up. Invoices must be itemized and should be submitted at the latest every 4 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.

Disbursements may include but are not limited to the following:

- ◆ Training/Tuition on a semester basis;
- ◆ Transportation for beneficiary (parking, bus passes, program assessments, appointments, travel to work settings and/or educational institutions, etc...);
- ◆ Books/software for training;
- ◆ Laptops/computers;
- ◆ 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; and
- ◆ Other items, as per the discretion of the VRCM.

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



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- ◆ Psychotherapy;
- ◆ Acute/curative medical care such as physiotherapy, chiropractic medicine, pain management programs;
- ◆ Alternative medicine such as acupuncture, massage, etc;
- ◆ Inpatient therapy program;
- ◆ Equipment/supplies not essential for training or to improve function;
- ◆ Child care expenses (except in certain cases of financial hardship negatively affecting participation in the program);
- ◆ Cost of accommodation (living away from home) while attending a training program; and
- ◆ Partial contribution toward relocation expenses.

## **8.2 SERVICE PROVIDER DISBURSEMENT AND TRAVEL EXPENSES**

Specialized assessments will be paid for at actual cost incurred without mark up. Interpretation of the specialized assessment will be reimbursed at the firm hourly rate as per the basis of payment.

Service provider's travel costs will be paid up to, but not exceeding, Treasury Board Travel Rates in effect at the time of travel. Note: HST cannot be requested in addition to the Treasury Board Travel Rates as it has already been included in the rates.

Service Provider travel expenses must be itemized on a Travel Expense Claim (see Appendix "K"), signed by the consultant and submitted with the appropriate invoice.

Professional travel time will be reimbursed at half (1/2) the hourly professional rate.

## **9.0. PERFORMANCE OUTCOMES:**

Service Canada will evaluate service provider performance based on adherence to the statement of work, client 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.



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## ANNEX B EVALUATION

### TECHNICAL BID EVALUATION

#### 1. MANDATORY EVALUATION CRITERIA:

- The bidder is required to provide services in both official languages for Area 3, New Brunswick.

MET: ☐ YES      MET: ☐ NO    OR    NOT APPLICABLE ☐ Not bidding on Area 3

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

MET: ☐ YES

MET: ☐ NO

- Bidders are instructed to provide their top five (5) proposed staff only. If additional CV's are provided by the bidder, the first 5 will be evaluated and all others discarded.

MET: ☐ YES

MET: ☐ NO

- Vocational Rehabilitation Consultants

All proposed staff/consultants must meet the following education requirements and work experience to be eligible for further evaluation:

- University degree or a diploma in Social Sciences, Health Sciences, Human Services AND;

MET: ☐ YES

MET: ☐ NO

- Minimum of two of the last three years experience\* in the provision of Vocational Rehabilitation services.

MET: ☐ YES

MET: ☐ NO

Current registration as a Registered Rehabilitation Professional (RRP), Canadian Certified Rehabilitation Counselor (CCRC)/Certified Rehabilitation Counselor (CRC), Certified Vocational Rehabilitation Professional (CVRP), or Masters Level Canadian Certified Counsellor (CCC) will be considered as an asset. Bachelor or higher level university degree in Vocational Rehabilitation will be scored higher.

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 is no staff proposed by a bidder that meets the minimum mandatory requirement described above, the bid shall be considered a failed bid.

\*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.

## 2. POINT RATED EVALUATION CRITERIA:

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

Criteria	Maximum Points
1) Education/training/certification: VR Consultant	35 points
2) Related Experience of Proposed: VR Consultant(s)	45 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
<b>Total</b>	<b>150 points</b>

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.

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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

## **2. FINANCIAL BID EVALUATION**

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

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### ANNEX C BASIS OF PAYMENT/FINANCIAL EVALUATION

#### MANDATORY REQUIREMENTS FOR THE FINANCIAL BID:

- 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: April 1, 2017 to March 31, 2018**

**OPTION PERIOD I: April 1, 2018 to March 31, 2019**

**OPTION PERIOD II: April 1, 2019 to March 31, 2020**

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 Initial Period (A)	FIRM HOURLY RATE Option Period I (B)	FIRM HOURLY RATE Option Period II (C)	AGGREGATE TOTAL (A+B+C)=D
6.1.1 Initial assessment Firm Hourly Rate				
6.1.2 Vocational confirmation Firm Hourly Rate				
6.2.1 Return to Work Plan (RWP) Firm Hourly Rate				
6.2.2 Revised RWP Firm Hourly Rate				
6.3.1 Client Development and Skills Training Firm Hourly Rate				
6.3.2 Job Search activity d) preparation Firm Hourly Rate				

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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 Firm Hourly Rate				
9.4 Reports e) return to work Firm Hourly Rate				
9.4 Reports f) closure Firm Hourly 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.**

**Specialized assessments**

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

Specialized assessments identified 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: \_\_\_\_\_

**Financial Services and Travel Time**

To be billed at ½ of the hourly professional rate and must have pre-approval by the Service Canada VRCM.

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## **ANNEX D INSURANCE REQUIREMENTS**

### **Commercial General Liability Insurance**

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

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

- a. **Additional Insured:** Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
- b. **Bodily Injury and Property Damage** to third parties arising out of the operations of the Contractor.
- c. **Products and Completed Operations:** Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
- d. **Personal Injury:** While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
- e. **Cross Liability/Separation of Insureds:** Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
- f. **Blanket Contractual Liability:** The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
- g. **Employees and, if applicable, Volunteers** must be included as Additional Insured.
- h. **Employers' Liability** (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
- i. **Broad Form Property Damage including Completed Operations:** Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
- j. **Notice of Cancellation:** The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.

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- 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 E 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



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**ANNEX F**  
**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;

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

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

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

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## **ANNEX G SRCL**

**To be distributed as an electronic attachment on GETS.**

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## APPENDIX "A" HYPOTHETICAL CASE STUDY

**Referral Source:** 1-800 call  
Self-referral

**Age:** 48

**Sex:** Female

**Family Status:** Single mother of one 9 year old child.

**Education:** Completed grade 12. (3 courses completed towards Business Administration Certificate)

**Living accommodation:** Low income housing, in small community. Beneficiary resides 40 kms from city.

**Occupational History:** Most recently employed from February 2004 to September 2009 as Full-time Pharmaceutical call center representative. Previous work history includes employment as Administrative Assistant from October 2002 to January 2004. Counter sales at Tim Horton's and waitressing jobs on and off over several years.

**Volunteer work:** Parent Volunteer at daughter's school, 2 hours per day, twice a week.

**Financial History:** Beneficiary has been in receipt of CPP-Disability benefits since March 2010. Beneficiary is receiving \$875.00 per month in CPP-D benefits, plus Disabled Contributor Child Benefits of \$237.69.

**Medical History/Information:** Medical information dated July 2009 from Family Physician indicates: has experienced daily pain related symptoms dating back to early 2000. Diagnosed with Fibromyalgia in 2004/hospitalized from November 3 to November 27, 2004. Hospitalization July 2009, relating to Major Depressive disorder, eventually diagnosed with bi-polar disorder, with anxiety.

**Current Status:** Beneficiary has indicated an improvement in her medical condition and indicates that she feels eventually able to return to extensive part time or full time employment. With recent change of medication beneficiary has decreased memory and concentration issues. Beneficiary indicates that in the past, she attended monthly appointments with her psychiatrist but now sees the doctor on a 6 month basis. Beneficiary was attending pain clinic for pain management, but is unable to continue due financial concerns. Beneficiary also advised that she has "learned to live with the pain". Beneficiary is requesting assistance from the Vocational Rehabilitation Program to complete her Business Administration program and to obtain support for job search activity. Beneficiary has not discussed her Return to work plan with her family physician.

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**Canada Pension Plan Disability Vocational Rehabilitation Program  
APPENDIX "B" – REQUIRED CONTENT  
INITIAL ASSESSMENT REPORT**

<b>Client Name:</b>	<b>Date of Referral:</b>
<b>Client Identifier Number:</b>	<b>Service Provider (SP):</b>
<b>Client Address:</b>	<b>SP – Consultant:</b>
<b>Client Telephone #:</b>	<b>SP – Consultant's direct telephone #:</b>
<b>Date of interview with the client:</b>	
<b>Date of interview with the physician:</b>	
<b>Date of interview with employer (if appropriate):</b>	
<b>Service Canada VR Case Manager:</b>	

**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**

*Note: If the client is not met in his/her own home, provide the client's reason(s) for not meeting there.*

**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 client's physician, or summary of consultant's meeting and/or telephone conversation with client's physician.
- 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

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- Client's work attitude and attendance

**8. Partner interview**

- Overview of planning and/or assessments done to date
- Cost sharing opportunity
- 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 minimal intervention. (*Clarify if the client can return to work now with job placement assistance ;*)
- 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

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**Canada Pension Plan Disability Vocational Rehabilitation Program  
APPENDIX "C" – REQUIRED CONTENT  
Labour Market Analysis**

Client Name:	Service Provide(SP):
Client Identifier Number:	SP Consultant:
Client Address:	SP Consultant's direct telephone #:
Client Phone #:	Date of Report:
Service Canada VR Case Manager:	

A Labour Market Survey for \_\_\_\_ (list type of occupation) \_\_\_\_ was completed by (service provider's name). All labour market research was conducted on \_\_\_\_ (or) between \_\_\_\_ and \_\_\_\_.

**JOB DESCRIPTION**

Job title: \_\_\_\_\_ NOC #: \_\_\_\_\_  
Duties: \_\_\_\_\_  
Skills, interests, values: \_\_\_\_\_  
Environment/Physical Demands of the job: \_\_\_\_\_  
Qualifications/Educational Requirements: \_\_\_\_\_

**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:

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*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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**Canada Pension Plan Disability Vocational Rehabilitation Program**  
**APPENDIX "D" – REQUIRED CONTENT**  
**Individual Written Rehabilitation Plan (IWRP)**

Original (Y/N)\_\_\_\_\_ Revised (Y/N)\_\_\_\_\_ If yes, revision #\_\_\_\_\_ Date:\_\_\_\_\_

Client Name:	Service Provider (SP):
Client Identifier Number:	SP Consultant:
Client Address:	SP Consultant's direct telephone #:
Client telephone#	Service Canada VRCM:
Previous Occupation:	
Education:	
Future Job Expectation:	

**RTW – Same Employer**  
☐ Same Occupation  
☐ Alternate Job  
☐ Modified Work

**Employment Goal**  
**RTW – New Employer**  
☐ Same Occupation  
☐ Alternate Job  
☐ Modified Work

**Self-Employment**  
☐ Same Occupation  
☐ Alternate Job  
☐ Modified Work

**Vocational Rehabilitation Short & Long Term Goals:**

--

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**Canada Pension Plan Disability Vocational Rehabilitation Program  
APPENDIX "D" – REQUIRED CONTENT  
Individual Written Rehabilitation Plan (IWRP)**

Original (Y/N)\_\_\_\_\_ Revised (Y/N)\_\_\_\_\_ If yes, revision #\_\_\_\_\_ Date:\_\_\_\_\_

**Reference Guide for Numbering (refer to the Statement of Work):**

Assessment Phase: 5.1  
Planning Phase: 5.2  
Intervention Phase: 5.3  
Financial Services: 5.4  
Client Disbursement and Travel Expenses: 8.1  
Service Provider Disbursement and Travel Expenses: 8.2

#	Objective	Services/Goods/Strategies Required	Provider	Cost or Funding Source	Start Date	End Date

**CPPD/Service Provider**

Costs:\_\_\_\_\_

Partner Costs: \_\_\_\_\_  
Client Costs: \_\_\_\_\_  
Total Projected IWRP Cost: \_\_\_\_\_

\_\_\_\_ I agree to comply and take responsibility for my own rehabilitation plan, including maintaining contact as determined with the service provider and informing the service provider of any change(s) in my medical condition and/or life situation that will affect the progression of the rehabilitation plan. I understand the plan may change as required throughout the rehabilitation process and will be subject to further review and signatures.

\_\_\_\_ I do not accept this plan.

Client Signature: \_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_ I agree with the rehabilitation plan as outlined. There are no medical concerns re the client's active participation in this rehabilitation plan.

\_\_\_\_ I do not agree with the rehabilitation plan as outlined. Please see the rationale in the comment section.

Physician Signature: \_\_\_\_\_ Date: \_\_\_\_\_

SP Consultant: \_\_\_\_\_ Date: \_\_\_\_\_

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Partnering Agency: \_\_\_\_\_

Representative Signature: \_\_\_\_\_

Date: \_\_\_\_\_

SC VRCM Signature: \_\_\_\_\_

Date: \_\_\_\_\_

COMMENTS: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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**Canada Pension Plan Disability Vocational Rehabilitation Program  
APPENDIX "E" – REQUIRED CONTENT  
PROGRESS REPORT**

<b>Client Name:</b>	<b>Service Provider:</b>
<b>Client Identifier Number :</b>	<b>SP Consultant Name:</b>
<b>Client Address:</b>	<b>SP Consultant Direct Telephone #:</b>
<b>Client Phone #:</b>	<b>Date of Last Report:</b>
<b>Current Phase: (Assessment, Planning, Intervention)</b>	
<b>SC Vocational Rehabilitation Case Manager:</b>	

**NOTE: Do not repeat or "copy and paste" 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.

\_\_\_\_\_  
Consultant Signature

\_\_\_\_\_  
Date

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**Canada Pension Plan Disability Vocational Rehabilitation Program  
APPENDIX "F" – REQUIRED CONTENT  
JOB SEARCH AGREEMENT**

Original \_\_\_\_\_ Revised \_\_\_\_\_ If Yes, Revision # \_\_\_\_\_ Date: \_\_\_\_\_

<b>Client Name:</b>	<b>SC Vocational Rehabilitation Case Manager:</b>
<b>Client Identifier Number:</b>	<b>SP Consultant:</b>
<b>Client Telephone #:</b>	<b>SP Consultant Direct Telephone #:</b>

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 and agrees to provide copies of paystubs if requested by the Service Provider or Service Canada.

***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.***

<b>Client Signature:</b>	<b>Date:</b>
<b>Service Provider's Signature:</b>	<b>Date:</b>

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**Canada Pension Plan Disability Vocational Rehabilitation Program  
APPENDIX "G" – REQUIRED CONTENT  
EMPLOYER CONTACT SHEET**

Client Name \_\_\_\_\_ Identification Number: \_\_\_\_\_

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	Outcome
		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:	

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**Canada Pension Plan Disability Vocational Rehabilitation Program  
APPENDIX "H" – REQUIRED CONTENT  
RTW Follow-Up Report**

<b>Date of Report:</b>	
<b>Client Name:</b>	<b>Service Provider(SP):</b>
<b>Client Identifier Number:</b>	<b>SP Consultant:</b>
<b>Client Address:</b>	<b>SP Consultant's Direct Telephone #:</b>
<b>Client Phone #:</b>	
<b>Date(s) of contact(s) with the client:</b>	
<b>Date (s) of contact (s) with the employer:</b>	
<b>Service Canada VR Case Manager:</b>	

**EMPLOYMENT INFORMATION**

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

**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

**Service Provider Supports/Services:** *(narrative of your support/services provided to the client during this time)*

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**Issues Identified:**

**Recommendations:**

\_\_\_\_\_  
Consultant Signature

\_\_\_\_\_  
Date



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**Canada Pension Plan Disability Vocational Rehabilitation Program  
APPENDIX "I" – REQUIRED CONTENT  
CLOSURE REPORT**

<b>Client Name:</b>	<b>Service Provider (SP):</b>
<b>Client Identifier Number:</b>	<b>SP Consultant:</b>
<b>Client Address:</b>	<b>SP Consultant Direct Phone #:</b>
<b>Client Phone #:</b>	<b>Date of Report:</b>
<b>Service Canada VR Case Manager:</b>	

- 1. Overview of Vocational Rehabilitation 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

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**Canada Pension Plan Disability Vocational Rehabilitation Program**  
**APPENDIX "J" – REQUESTED CONTENT**  
**General Invoice Template**

Invoice number	Invoice Date	Service Canada VRCM
----------------	--------------	---------------------

**Payment Information (please ensure that you have completed your Direct Deposit Information)**

Service Provider Name:	Service Provider Branch Address:
Service Provider File Number:	Telephone Number (include area code)

**Client Information**

Client's Last Name	Client's First Name
Client Identification Number:	Procurement or Requisition Number:

**Service Information**

Date of service	Rehab Phase	Description	Number of hours	Cost per hour	Subtotal (not including taxes)	GST (if charged)	HST (if charged)	Total (including taxes)
								<b>A:</b>

**Disbursement Information (at cost, no mark-up)**

Date of service	Description	GST (if applicable)	HST (if applicable)	Total (including taxes – if applicable)

**B:**

Invoice  
Total  
A + B

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**Canada Pension Plan Disability Vocational Rehabilitation Program  
APPENDIX "K" – REQUIRED CONTENT  
Travel Expense Claim**

To Be Completed by the Traveler (Service Provider)

Organization:

Invoice #:

Name:

Telephone:

Address:

City:

Postal Code:

START DATE OF TRAVEL: \_\_\_\_\_ END DATE OF TRAVEL: \_\_\_\_\_  
DESTINATION: \_\_\_\_\_  
TIME OF DEPARTURE: \_\_\_\_\_ TIME OF RETURN: \_\_\_\_\_  
TOTAL DAYS TRAVELED FOR THIS INVOICE: \_\_\_\_\_

TRANSPORTATION		
Air fare as per ticket		\$
Taxi, Bus, Train		\$
Car: Rate/Km \$ _____ x Km travelled _____ =		\$
Other (specify)		\$
Subtotal		\$
MEALS AND INCIDENTALS		
Breakfast (Leave residence before 6:30 a.m.)	\$ _____ X _____ days	\$
Lunch	\$ _____ X _____ days	\$
Dinner (Arrival at residence after 7:30 p.m.)	\$ _____ X _____ days	\$
Incidentals (For overnight stay only)	\$ _____ X _____ days	\$
Subtotal		\$
ACCOMMODATIONS		
Hotel / Motel	\$ _____ X _____ days	\$
Other (specify) _____	\$ _____ X _____ days	\$
Subtotal		\$
TOTAL		
EXPENDITURES		\$

Traveler's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

This form must accompany the invoice and is subject to the Treasury Board Travel Policy. Receipts and Itemized invoice required for all travel except meals and incidentals

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**Appendix L**  
**Demonstrated Network for Specialized Assessments**  
**(please use as many sheets as required to clearly demonstrate your network)**  
**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: _____