

**ANNEX A3**  
**STATEMENT OF WORK (SOW)**  
**FOR**  
**VETERANS AFFAIRS CANADA**

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## **APPENDICES**

Appendix 1- Glossary of Terminology

Appendix 2 - Not applicable to VAC

Appendix 3 – Not applicable to VAC

Appendix 4 - Not applicable to VAC

Appendix 5 – Not applicable to VAC

Appendix 6 – Not applicable to VAC

Appendix 7 – No applicable to VAC

Appendix 8 – Not applicable to VAC

Appendix 9 – Not applicable to VAC

Appendix 10 – VAC HCP Occupational Groups and Categories (small list)

Appendix 11 – VAC HCP Qualifications and Tasks

Appendix 12 – VAC - HCP Work Locations

Appendix 13 – VAC - Initial HCP Requirement Plan

Appendix 14 - VAC Deliverables Table

Appendix 15 – Not applicable to VAC

Appendix 16 - Not applicable to VAC

Appendix 17 – List of Federal Government Holidays

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Appendix 19 - Not applicable to VAC

Appendix 20 - Not applicable to VAC

## **1.0 INTRODUCTION**

### **1.1 Purpose**

Veterans Affairs Canada (VAC) has a requirement for a Contractor to provide and manage Health Care Providers (HCPs) needed to supplement its workforce in providing health care support services at various locations across Canada.

### **1.2 General Information**

Health professionals working at VAC provide professional health advice, consultation, assessments and decisions, as well as advice on legislation and policies, in support of VAC's mission to provide client-centered services and benefits that respond to the needs of clients. Health professionals working at VAC do not provide primary care to clients.

### **1.3 Background**

VAC employs health professionals to provide services to the various offices across Canada. This workforce is supplemented with health professionals under contract, where necessary due to operational demand. In some cases, there is a recurring contractual need for health professional providers, which is supplied through various contractual arrangements.

### **1.4 Departmental Authorities**

VAC Department Authorities (DAs) are responsible for the technical Work and contract management activities inside the Department and are as follows:

- a. Departmental Technical Authority (DTA);
- b. Departmental Procurement Authority (DPA) and
- c. Task Manager (TM).

- 1.4.1 The DTA is the representative from VAC, for whom the Work is carried out under the Contract, and is responsible for all matters concerning the technical content of the Work under the Contract.

The DTA is responsible to:

- a. administer the Task Authorization process; and,
- b. verify and process the invoices for payment.

1.4.1.1 The Task Manager (TM) is responsive to the DTA and is the manager of the HCP. The TM is responsible to:

- a. manage the Work being carried out under Task Authorization;
- b. authorize temporary work location changes;
- c. advise HCPs of unexpected temporary closures to work location;
- d. authorize HCP overtime;
- e. authorize HCP travel and Site Visits; and,
- f. schedule hours of work.

1.4.2 The DPA is the representative of the VAC, responsible for all matters concerning the department's procurement work under Contract. The DPA is responsible for validating the technical requirements against scope of the Work and the Contract.

1.4.3 VAC will provide the DA names to the Contractor after Contract award.

## 1.5 **Terminology**

The glossary of Terminology, which includes abbreviations, is found at Appendix 1 to Annex A – SOW VAC.

## 2.0 **APPLICABLE DOCUMENTS**

For a complete list of applicable VAC documents, please refer to the Appendices listed in the Table of Contents above which form part of Annex A - SOW VAC:

- a. Privacy Act, at <http://laws-lois.justice.gc.ca/eng/acts/p-21/>;

2.1 The Contractor or Contractor's Management Team (CMT) or Contractor's HCPs must use and apply the applicable documents in the performance and delivery of the Work.

## 3.0 **SCOPE OF CONTRACT**



The scope of Work under the Contract includes:

- a. the provision of HCPs, which mainly consists of: recruiting; verification of credentials and references; hiring; obtaining HCP security clearances; and department introduction including the orientation package when applicable;
- b. the management of the HCPs, which mainly consists of: retention; replacing or backfilling HCPs; accounting for hours worked by the HCP using the Timesheet Tool; credentialing; performance management and issue management when necessary, and
- c. the contract management activities, which mainly consists of:
  - (1) planning, organizing and scheduling work and deliverables to meet the required timelines or schedule; establishing processes or procedures to provide and manage HCPs; administration and management of the Timesheet Tool;
  - (2) invoicing; preparing and providing various project management plans and reports;
  - (3) attending meetings; and
  - (4) establishing and maintaining the Contractor organizational structure and management team to support providing all the Contract requirements and deliverables.

### **3.1 Contract Objectives**

The objectives of the Health Care Provider Contract (HCPC) are to ensure that VAC obtains the required number of qualified HCPs needed to supplement its existing workforce in providing services to support the delivery of work, as well as to administer and manage the required HCP resources.

### **3.2 Intended Use of Contract**

VAC intends to use the HCPC when identified work force shortages occur. Examples of circumstances of when this Contract may be used, include, but are not limited to, any one of the following:

- a. to offset shortages caused by difficulties in recruiting and retaining public service employees in health occupational groups;
- b. when replacement of personnel is required as a result of training, leave, etc.;

- c. to supply HCPs when a Public Service staffing process has not been successful;
- d. to act as a bridging mechanism while awaiting a Public Service staffing process to be completed;
- e. to adjust to the needs of a changing demographic; or
- f. when HCP requirements arise.

### 3.3 Contract Phases

Under the Contract, there are three (3) Contract Phases defined as follows:

- a. **Start-Up Phase** is the period from the date of Contract award to the Service Effective Date (SED), which will be approximately six (6) months. The Start-Up Phase is outside of the initial Contract period. The Contracting Authority (CA) will provide the Contractor with the duration of the phase on the Contract Award Date;
  - b. **In-Service Phase** starts on the SED and includes the initial Contract period (48 months), as well as any of the option periods exercised, and will cease at the start date of the Out-Going Phase and;
  - c. **Out-Going Phase** is a period of approximately twelve (12) months before the Contract expiry date. The CA will provide the Contractor with the Out-Going Phase notification.
- 3.3.1 During the Start-Up Phase, the Contractor must set-up and prepare for providing all requirements and deliverables required in this phase and the subsequent phases. In addition, the Contractor must undertake any transition activities needed from previous Contracts as well as carry out all provision type activities based on the Initial HCPs Requirement Plan and VAC Task Authorizations for the HCPs that are required at SED.
  - 3.3.2 During the In-Service Phase, the Contractor must provide all requirements and deliverables required in this phase; some may have commenced in the Start-Up Phase but continue throughout this phase and the subsequent phase. In addition, the Contractor must carry out all provision and management activities based on terms and conditions of the Contract and on the Annual HCP Requirement Plan and VAC Task Authorizations issued for recurring requirements, and for any new HCP requirements identified thereafter via VAC Task Authorization.
  - 3.3.3 During the Out-Going Phase, the Contractor must provide all requirements and deliverables required in this phase; some may have commenced in the Start-Up or In-Service phases but continue throughout this phase. In addition, the Contractor must continue to manage the existing HCPs on VAC Task Authorizations, as well as provide

and manage any new HCP requirements identified via the VAC Task Authorization process during this phase, and undertake the Out-Going Phase activities.

- 3.3.4 Any transition activities required between the previous and new Contract will be organized and coordinated through the CA.

### 3.4 **HCP Work Streams**

The VAC HCP Work Streams are as follows:

- a. VAC Stream 1 – Field Nursing Services Officer;
  - b. VAC Stream 1 – Field Occupational Therapist Services Officer;
  - c. VAC Stream 1 – Medical Advisor;
  - d. VAC Stream 1 – Dental Consultant;
  - e. VAC Stream 1 – Audiologist Advisor;
  - f. VAC Stream 1 – Registered Respiratory Therapist; and
  - g. VAC Stream 2 – Senior Area Medical Officer;
- 3.4.1 The Work under Stream 1 consists mainly of providing expert advice, assessments, consultations, screening activities, recommendations and decisions. This Stream does not provide direct medical or dental care to clients. The outline of the tasks and deliverables are identified under the specific occupational groups and categories. The VAC Task Authorization will include the detailed information on the specific tasks, deliverables and timelines or schedule.
- 3.4.2 The Work under Stream 2 consists of conducting Pension Medical Examinations as well providing expert advice, assessments, consultations, screening activities and recommendations. This Stream does not provide primary care to clients. The outline of the tasks and deliverables are identified under the specific occupational groups and categories. The VAC Task Authorization will include the detailed information on the specific tasks, deliverables and timelines or schedule.

### 3.5 **HCP Occupational Groups and Categories**

The HCP Occupational Groups and Categories are found at Appendix 10 to Annex A - SOW VAC, and are listed by the Streams.

### **3.6 HCP Qualifications and Tasks**

The HCP Qualifications and Tasks are presented in Appendix 11 to Annex A - SOW VAC, and include the specific work environment, education, experience and tasks required for each Category.

- 3.6.1 As a minimum, all HCPs provided by the Contractor must meet all the mandatory requirements of the Contract, including the education and experience stated in the Qualifications and Task Sheets for the specific Occupational Group and Category.

### **3.7 Type of HCP Requests**

There are three (3) types of HCP Requests, as follows:

- a. New;
- b. Recurring; and
- c. Short Term.

- 3.7.1 A New HCP Request is defined as HCP shortage identified that was not under a Task Authorization in the current FY.
- 3.7.2 A Recurring HCP Request is defined as a HCP requirement that was under a Task Authorization in the current FY that continues to be required in the upcoming FY.
- 3.7.3 A Short-term HCP Request is defined as a HCP requirement needed to fill a capability gap that lasts for, pertains to, or involves a short period. For the purposes of the HCPC, the length of a short-term requirement is 180 calendar days or less.

### **3.8 Priority of HCP Requests**

There are two (2) types of HCP Request priorities, which are as follows:

- a. Routine; and
- b. Urgent.

- 3.8.1 Routine is defined as a HCP Requirement that the priority to fill is not urgent.
- 3.8.2 Urgent is defined as a HCP Requirement that must be staffed as a priority over a Routine HCP Request, and therefore necessitates immediate action and attention.

3.8.3 Routine and Urgent HPC Requests can also be New, Recurring and Short-term.

3.8.4 The priority of HCP Requests can be applied under any of the HCP Work Streams.

### **3.9 HCPs Work Locations**

The HCPs Work Locations are found at Appendix 12 to Annex A – SOW VAC, and listed by the Streams. For this Contract the work location can be either Regular or Temporary Work Locations.

3.9.1 Regular Work Location is defined as the single permanent location defined on the VAC Task Authorization, from which the HCP ordinarily performs the Work.

3.9.2 Temporary Work Location is defined as the single location where the HCP is temporarily assigned to perform the Work.

### **3.10 Initial HCP Requirement Plan Definition**

The Initial HCP Requirement Plan is the estimated HCP Requirements that are required to start working at the SED. An example Plan is provided in Appendix 13 to Annex A – SOW VAC for information purposes only and does not represent a commitment by VAC that the Initial HCP Requirement Plan provided to the Contractor after Contract award will be the same.

3.10.1 The Initial HCP Requirement Plan lists categories down one side and locations across the top for all Streams. It identifies the number of Full Time and Part Time positions, with the number of hours per week identified for part time positions only. Full Time positions will be at 37.5 hours per week.

3.10.2 Deleted in solicitation amendment 004.

3.10.3 Full time is defined as a 7.5-hour work day; total of 37.5 hours per week; and from Monday to Friday.

3.10.4 Part time is defined as Work less than 37.5 hours per week. Part time hours are determined by the TM and the required hours and schedule will be stated on the Task Authorization.

3.10.5 Overtime is defined as authorized time worked by the HCP in excess of 37.5 hours in a working week.

3.10.6 Full Time and Part Time HCP Requirements can be New, Recurring or Short Term.

### **3.11 Annual HCP Requirement Plan Definition**

The Annual HCP Requirement Plan is the HCP Requirements that are required for the upcoming Fiscal Year (FY), which starts on April 1 of every year. The Annual HCP Requirements Plan will replace the Initial HCP Requirement Plan. VAC will compile the Annual HCP Requirement Plan in the third quarter of each FY for organizational planning and budget purposes.

- 3.11.1 The Annual HCP Requirements Plan will consist of VAC HCP (Recurring and New) requirements for each VAC location, category and stream.

### **3.12 Time To Provide**

The Time to Provide (TTP) is defined as the period that starts when the VAC – Task Authorization Form (TA Form) is initially sent to the Contractor and ends on the required Work start date. The Contractor must submit its response to the DPA no later than 20 calendar days before the end of the TTP for the In-Service and Out-Going Phases. During the Start-Up Phase the Contractor must submit its response to the DPA no later than 40 calendar days before SED. The Contractor is encouraged to submit response packages as they become available in order to streamline processing of the large volume of responses during the Start-Up Phase.

- 3.12.1 The end date of the TTP in the In-Service and Out-Going Phases are as follows:

- a. for New HCP Requests with Routine priority: 60 calendar days from when the VAC TA Form is initially sent to the Contractor;
- b. for New HCP Requests with Urgent priority: 21 calendar days from when the VAC TA Form is initially sent to the Contractor; and
- c. for Recurring Annual HCP Requirements: 30 calendar days from when the Annual HCP Requirements Plan is sent to the Contractor.
- d. an extension to the TTP may be authorized by the DTA, on a case-by-case basis.

### **3.13 Temporary Change to HCP(s) Regular Work Location(s) Within the Designated VAC Locations**

HCPs may be required to work at a Temporary Work Location from the Regular Work Location, for various reasons such as, HCP shortages, vacancies, absences, etc.

Temporarily is defined as one (1) work day and up to 30 calendar days. For the purpose of this Contract, a Designated VAC Work Location spans an area of 50 kilometers from the Regular Work Location using the most direct, safe and practical road.

3.13.1 When a Temporary Change to a HCP Designated Work Location is required, the Contractor will be provided with written notification three (3) calendar days in advance of a temporary change to the Regular HCP Work Location.

3.13.2 The notice will contain the following information:

- a. Task Authorization number;
- b. name of HCP;
- c. location name and address of the temporary work location;
- d. reason for the change;
- e. duration of change and the number of days; (from and to dates and total number of days);
- f. required hours of work (7:00 am to 3:00 pm or 8:00 am to 4:00 pm, etc.);
- g. required schedule, if part time (Monday, Wednesday and Friday, or Tuesday and Wednesday, etc.);
- h. overtime involved - Yes/No; and
- i. Point of Contact (POC) at the temporary work location (name, email address and telephone number).

3.13.3 Travel expenses to and from the temporary work location are not billable, as this is considered the work place.

3.13.4 The VAC TA will provide a written Temporary HCP Work Location notice to the Contractor.

3.13.5 The Contractor must submit the Temporary HCP Work Location notice with their invoice, as this establishes the authorization for the change.

3.13.6 An amendment to the VAC Task Authorization will not be issued for a Temporary Work Location.

**3.14 Temporary Change to HCP(s) Work Location(s) Outside Designated VAC Location(s)**

On occasion, VAC may require HCPs to temporarily work outside the Designated VAC Location or province of work. This change in work location will be considered travel. Temporary for this requirement is defined as less than thirty (30) calendar days. All Temporary Work Locations outside the Designated VAC Location or province of work requires the approval of the DTA before the change can occur.

3.14.1 The DTA will provide the Contractor with the written approval for the Temporary Work Location outside the Designated VAC Location or province of work.

3.14.2 The written approval must contain the following information:

- a. Task Authorization number;
- b. location name and address of the temporary work location;
- c. name of HCP;
- d. reason for the change;
- e. date(s) and duration of the change;
- f. required hours of work; and
- g. Point of Contact (POC) at the temporary work location (name, email address and telephone number).

3.14.3 Temporary Changes to Work Location(s) outside the Designated VAC Location or province of work will be considered travel. The HCP Travel Request and Authorization process must be followed and is detailed under Annex A- SOW VAC article titled HCP Travel.

3.14.4 When the Temporary Change to a HCP work location is outside of the HCPs current province of work, the Contractor must ensure the HCP obtains the required additional licenses and registration, when required.

3.14.5 The Contractor must submit the complete approval package, travel itinerary, claimable expenses and receipts with the invoice.



- 3.14.6 When a HCP is requested to travel and the travel requirement is not stated in the Task Authorization, the Task Authorization must be amended for the travel requirement before the travel for Temporary Changes to the Work Location(s) outside the Designated VAC Location or province of work is conducted.

### **3.15 Temporary Closures to Work Location**

Temporary closures to work location(s) may occur over the period of the Contract and closures can be expected or unexpected. Expected is defined as within the Department's control and cover repairs, scheduled maintenance, renovations, installations of new equipment(s), etc. Unexpected is defined as outside the control of the Department, such as flood or fire, equipment failure or shut down, power outages or extreme weather conditions, etc.

- 3.15.1 When a temporary closure to a Work Location is expected, the TM will advise the Contractor in writing, a minimum of seven (7) calendar days in advance of the temporary closures. The notice will include the date(s) and duration (if known) of the closure, and the name(s) of the HCP(s) affected by the temporary closure.
- 3.15.2 The Contractor must advise the affected HCP(s) of any expected temporary closures to Work Location(s) accordingly.
- 3.15.3 If unexpected temporary closures to a Work Location occurs, the VAC location manager will advise the HCP(s) verbally. The VAC location manager is a manager who physically works from that specific location, but may not report to the Health Professional Division. The DTA will then advise the Contractor. The notice will include the name(s) of the HCP(s) affected, and when known, advise the Contractor of the date and time the HCPs are to return to the work location.
- 3.15.4 The Contractor must contact the HCP(s) and advise them of the date and time they are to return to the work location.
- 3.15.5 The HCP's time during expected or unexpected temporary closures to Work Location closures is not billable.

### **3.16 Permanent Closures to Work Location**

Permanent closures to work location(s) may occur over the period of the Contract.

- 3.16.1 If a permanent closure to a work location is expected by VAC, the DTA will advise the Contractor in writing, a minimum of 30 calendar days' in advance of the permanent Closure date.
- 3.16.2 The permanent closure to work location notice will contain the following information:

- a. date of the notice;
- a. work location closure date; and
- b. a list of VAC Task Authorizations affected by the work location closure.

3.16.3 The Contractor must advise the affected HCP(s) of permanent closures to work location(s).

3.16.4 If HCPs are affected by a permanent closure to a work location, the conditions stipulated in the Annex A - SOW VAC article titled VAC Cancellation of a Task Authorization will apply.

### 3.17 **HCP Tele-Health Work**

Tele-Health is defined as the delivery of health services via information technology. Currently Tele-Health is not used at VAC. Over the life of the contract, there may be a requirement to provide Tele-Health Work.

### 3.18 **Site Visits**

An HCP may be requested to conduct client assessments in the client's residence, which could include seniors residence, hospital, etc. These instances are infrequent.

## 4.0 **REQUIREMENTS**

### **Part One – Start-Up Phase**

#### 4.1 **Contractor's Organization**

The Contractor must set up its organizational structure to manage Work, requirements, deliverables and Task Authorizations related to all HCP requirements throughout all Phases of the Contract.

4.1.1 The Contractor's organizational structure, number of team members, roles and responsibilities or function(s) and qualifications of the individual team members are the Contractor's responsibility.

#### 4.2 **Contractor's Work Location**

The Contractor and Contractor's Management Team must work from their own site(s) throughout the duration of the contract.

#### **4.3 Contractor's Central Office**

The Contractor must set up and manage a Contractor's Central Office (CCO) in Canada throughout the duration of the Contract.

- 4.3.1 The CCO must be the centralized point of contact for the CA, DTA and DPA for all contract related communications such as Task Authorizations, inquiries, issues or clarifications.
- 4.3.2 The CCO must be equipped to receive the Task Authorizations and general inquiries, via email, fax, and telephone and have the capability to conduct teleconferences, videoconferences and web conferences.
- 4.3.3 The CCO must be available from Monday to Friday between the hours of 8:00 am and 5:00 pm, Eastern Standard Time.
- 4.3.4 The CCO will not be required to be available of Federal Government Holidays or on civic and statutory holidays designated by the province in which the CCO is located.
- 4.3.5 The CCO must employ a minimum of one person who is bilingual and capable of providing services to VAC in both of Canada's Official Languages (OL) – English and French. Bilingual means that the individual(s) must be able to read, comprehend and communicate in clear language, both orally and in writing, using both official languages, without assistance and with minimal errors.
- 4.3.6 The Contractor must have a toll free telephone number, teleconference number, and an email address for use in working with VAC. Refer to Appendix 14 - Deliverable 1.
- 4.3.7 The Contractor must provide the name, title, role and responsibility, and email address if different from the general email address, for point of contact personnel employed within the CCO. Refer to Appendix 14, Deliverable 2
- 4.3.8 The Contractor must manage any CCO personnel changes without affecting the services required under the Contract and provide the name, title, role and responsibility, and email address if different from the general email address of any changes made to the CCO personnel within five (5) working days. Refer to Appendix 14, Deliverable 3.
- 4.3.9 The Contractor must ensure that the CCO personnel have the necessary experience and training required to be able to discharge their responsibilities.
- 4.3.10 Any associated training costs or travel expenses incurred in support of training are the Contractor's responsibility.

#### **4.4 Contractor's Management Team**

The Contractor must establish a Contractor's Management Team (CMT). The team composite may be different for each phase of the Contract.

- 4.4.1 The name, title, role, summary of responsibilities, location and contact information for each member of the CMT must be confirmed at the initial Contract Kick-Off Meeting and must be based on the team composite described and proposed in the Contractor's bid. Refer to Appendix 14, Deliverable 2.
- 4.4.2 The Contractor must provide updated name, title, role and responsibility, and email address if different from the general email address, for any changes made to the CMT personnel, within two (2) working days of the change. Refer to Appendix 14, Deliverable 3.
- 4.4.3 The CMT must employ a minimum of one (1) person who is bilingual and capable of providing services to VAC in both of Canada's Official Languages (OL) – English and French. Bilingual means that the individual(s) must be able to read, comprehend and communicate in clear language, both orally and in writing, using both official languages, without assistance and with minimal errors.
- 4.4.4 The Contractor must ensure that the CMT personnel have the necessary experience and training required to be able to discharge its responsibilities.
- 4.4.5 Any associated training costs or travel expenses incurred in support of training their personnel are the Contractor's responsibility.

#### **4.5 Contractor's Service Delivery Manager**

The Contractor must provide a dedicated Service Delivery Manager (SDM) as Lead for the CMT throughout the duration of the Contract.

- 4.5.1 The SDM position must be filled at all times, including periods when the SDM is absent for any reason.
- 4.5.2 The SDM will be the primary point of contact (POC) for the CA, the DTA and DPA.
- 4.5.3 The SDM must have the authority to plan, organize, coordinate, make decisions, direct, execute, implement, monitor, provide feedback, report, and manage all Work activities undertaken by the CMT in support of the Work associated with the provision and management of the HCPs.
- 4.5.4 The SDM must respond to any phone calls or emails from the CA, DTA or DPA within two (2) working days.

4.5.5 The SDM's name and contact information must be confirmed within 5 (five) calendar days after Contract award. Refer to Appendix 14, deliverable 4.

4.5.6 As a minimum, the SDM must have the following qualifications and experience:

- a. a University degree, or an acceptable combination of education and experience, such as:
  - (1) a college certificate or college diploma; plus
  - (2) seven (7) years' experience in a senior management role or position with direct responsibility for managing a multi-million-dollar contract, project or program;
- b. seven (7) years' experience within the last 14 years in project or program management;
- c. five (5) years' experience within the last 10 years in managing employees;
- d. three (3) years' experience within the last six (6) years in contract management; and
- e. must be proficient in English.

4.5.7 The Contractor must provide a minimum of 30 calendar days' notice of the intent to permanently replace the SDM. Refer to Appendix 14, deliverable 5.

4.5.8 Any proposed replacement SDM must meet the qualifications as outlined above and will be subject to the concurrence of the DTA.

#### 4.6 **Deputy Service Delivery Manager**

The Contractor must provide a Deputy Service Delivery Manager (DSDM) as part of the CMT throughout the duration of the Contract.

4.6.1 The DSDM must replace and be available when the SDM is absent for any reason.

4.6.2 The DSDM's name and contact information must be confirmed five (5) calendar days after Contract award. Refer to Appendix 14, deliverable 4.

4.6.3 As a minimum, the SDM must have the following qualifications and experience:

- a. University degree or an acceptable combination of education and experience, such as:
    - (1) college certificate or college diploma; plus
    - (2) five (5) years' experience in a senior management role or position with direct responsibility for managing a multi-million-dollar contract, project or program;
  - b. five (5) years' experience within the last 14 years in project or program management;
  - c. four (4) years' experience within the last 10 years in managing employees;
  - d. two (2) years' experience within the last six (6) years in contract management; and
  - e. must be proficient in English.
- 4.6.4 The Contractor must provide a minimum of 15 calendar days notice of the intent to permanently replace the DSDM. Refer to Appendix 14, deliverable 6.
- 4.6.5 Any proposed replacement DSDM must meet the qualifications as outlined above and will be subject to the concurrence of the DTA.
- 4.7 Contractor's Start-Up Plan**
- The Contractor must develop and deliver a draft and final Start-Up plan. The draft Start-Up plan must be delivered within 14 calendar days after Contract award. Refer to Appendix 14, Deliverable 7.
- 4.7.1 The Start-Up Plan can incorporate any Contractor start-up and set-up activities and practices but as a minimum, must include the following:
- a. a list and description of Contractor start-up and set-up activities to be completed and the major milestones to be achieved during the Contract Start-Up Phase to allow for orderly and timely set up that will fully meet all the Annex A - SOW VAC requirements before and at SED;
  - b. a high-level Work Breakdown Structure reflective of all the activities and sub-activities, the major milestones and deliverables;

- c. a schedule in MS Project which states the proposed timelines or timeframes for all activities and sub-activities, related milestones, all dependencies and the critical path; and
  - d. the Contractor's Senior Management structure for the Contract Start-Up Phase, including but not limited to the Contractor's Start-Up Phase management team, any oversight committees, or working groups established by the Contractor, etc. The structure must indicate where participation is required or may be requested from the DTA, and what processes and procedures are recommended to ensure quick decision-making within the plan to facilitate the timely delivery of services.
- 4.7.2 The schedule will form the baseline in which the Contractor's performance will be monitored and measured by VAC.
- 4.7.3 The Contractor must revise and update the Start-Up Plan within ten (10) calendar days if comments or recommendations are received from the DTA. Refer to Appendix 14, deliverable 8.
- 4.7.4 Once the Start-Up Plan is approved by the DTA, it will be deemed the final Start-Up Plan.
- 4.7.5 The Contractor must implement and carry out all start-up and set-up activities in accordance with approved Start-Up Plan during the Start-Up Phase.

#### 4.8 **Contractor's Recruitment Plan**

The Contractor must develop and deliver a draft and final Recruitment Plan. The draft Recruitment Plan is due within 30 calendar days after Contract award. Refer to Appendix 14, Deliverables 9.

- 4.8.1 The Recruitment Plan must list and describe all the recruiting activities that will be completed in order to meet the VAC's requirements for HCPs at the SED and throughout the duration of the Contract.
- 4.8.2 The Recruitment Plan, as a minimum, must include the following strategies and approach elements:
- a. to recruit the initial HCPs required at SED; and new HCPs requirements after the SED and during the In-Service Phase;
  - b. to meet short-term HCP requirements;
  - c. for urgent HCP requirements within the reduced Time To Provide timelines;
  - d. the retention strategies to be used to retain HCPs and to minimize HCP turnover;

- e. the replacement approach when HCPs are absent for an extended period of time; and,
  - f. the recruiting communications strategies for:
    - (1) promotional material development and distribution;
    - (2) communication channels, streams, and methodologies;
    - (3) advertising plans and marketing strategies; and
    - (4) Contractor's recruiting innovations.
- 4.8.3 The Contractor must revise and update the Recruitment Plan within 20 calendar days, if comments or recommendations are received from the DTA. Refer to Appendix 14, Deliverable 10 .
- 4.8.4 Once the draft Recruitment Plan is approved by the DTA, it will be deemed the final Recruitment Plan.
- 4.8.5 The Contractor must implement, and carry out all recruiting activities in accordance with the approved final Recruitment Plan throughout the duration of the Contract.
- 4.8.6 If the Contractor's strategies and approach to recruitment change during the Contract period, or if VAC requests a change to the Recruitment Plan, the Contractor must update or revise the final Recruitment Plan to reflect the requested changes and send to the DTA for approval. Refer to Appendix 14, Deliverable 11.
- 4.9 Contractor's Risk Management Plan**
- The Contractor must develop and deliver a draft and final Contractor's Risk Management Plan (CRMP). The draft CRMP is due within 30 calendar days of Contract award. Refer to Appendix 14, Deliverable 12.
- 4.9.1 The CRMP must detail and describe the procedures and methods to be used in identifying, analyzing, evaluating, tracking, reporting, and mitigating risk(s) throughout the duration of the Contract.
- 4.9.2 The CRMP, as a minimum, must describe and detail all the elements listed below:
- a. Concept for Management of Risk;



- b. Risk Prediction Methodology;
  - c. Risk Identification (Risk Factors);
  - d. Risk Analysis (Probabilities and Effects) and Risk Assessment;
  - e. Risk Response (Avoid, Transfer, Mitigate, and Accept) and associated costs;
  - f. Issue Review and Lessons Learned (LL) Analysis Methodology; and
  - g. Issue Report Methodology.
- 4.9.3 The CRMP must include a section for each phase of the Contract with identification of each of the phase's risks. Each of the sections must include:
- a. an initial risk analysis and assessment;
  - b. identification of risks and if necessary a creation of Risk Breakdown Structure;
  - c. Qualitative Risk Analysis;
  - d. Quantitative Risk Analysis;
  - e. Risk Response Planning;
  - f. Risk Monitoring and Control; and
  - g. a feedback and lessons learned process.
- 4.9.4 The Contractor must revise and update, within 20 calendar days, the draft CRMP based on comments or recommendations received from the DTA. Refer to Appendix 14, Deliverable 13.
- 4.9.5 Once the draft CRMP is approved, the CRMP will be deemed the final CRMP and must be used to manage and mitigate the risks throughout the duration of the Contract. If VAC requests changes throughout the Contract period, changes must be implemented by the Contractor within 10 calendar days of receipt.
- 4.9.6 The Contractor must update or revise the final CRMP for every Program Review Meeting (PRM). The version number and date must be annotated on each CRMP revision or update. Refer to Appendix 14, Deliverable 14.
- 4.9.7 The final CRMP updates must include:
- a. the identification of new risks;
  - b. ongoing risks;

- c. any or all risk mitigation actions taken plus the associated costs;
  - d. all corrective actions taken;
  - e. outcomes to date;
  - f. detail(s) of all the potential issues or obstacles affecting the schedule timelines; and,
  - g. further recommended or suggested course of action(s).
- 4.9.8 The Contractor must provide advance electronic copies of the current CRMP to the CA, DTA and the DPA five (5) calendar days before each Progress Review Meeting (PRM). Refer to Appendix 14, Deliverable 15.
- 4.9.9 The Contractor must provide hard copies of the current CRMP to each attendee at the PRM. Refer to Appendix 14, Deliverable 16.
- 4.9.10 If any substantive risk(s) occur before the PRM reporting cycle, the Contractor must advise the DTA in writing within three (3) calendar days and must report these risks in the Monthly Program Report. Refer to Appendix 14, Deliverable 17.
- 4.10 **Contractor's Management Plan**
- The Contractor must develop and deliver a draft and final Contractor's Management Plan (CMP). The draft CMP is due within 30 calendar days after Contract award. Refer to Appendix 14, Deliverable 18.
- 4.10.1 The CMP must consolidate the entire Contractor's administrative and management processes, practices and procedures, and its supporting organizational structure used to manage all the Work, requirements and deliverables required under the Contract. The CMP must be used throughout the duration of the Contract.
- 4.10.2 The CMP, as a minimum, must describe and detail the Contractor's administrative and management processes, practices and procedures for the:
- a. management of Work, requirements and deliverables required under the Contract;
  - b. schedule control and management during the Contract Start –Up Phase;
  - c. contractor's CCO and CMT Performance management and monitoring;
  - d. HCP management as it relates to recruitment, retention, credentialing, training and performance evaluation management and monitoring;
  - e. quality control;
  - f. risk reporting process;
  - g. media communications process;

- h. Contract Change Management process to implement improvement or changes;
  - i. problem resolution;
  - j. HCPs time verification process;
  - k. invoice processing including verifications and validations to detect errors;
  - l. contractor's internal and external line of communication; and
  - m. Compliance with VAC security requirements. The Contractor must use Public Works and Government Services Canada's Online Industrial Security System (OLISS) to submit security clearance requests unless there is an acceptable reason to submit in an alternative format (VAC will provide approval if the situation warrants use of an alternative submission format).
- 4.10.3 The Contractor must revise and update the CMP within 20 calendar days if comments or recommendations are received from the DTA. Refer to Appendix 14, deliverable 19.
- 4.10.4 Once the draft CMP is approved, it will be deemed the final CMP and must be used throughout the duration of the Contract.
- 4.10.5 The Contractor must ensure that its administrative and management processes, practices and procedures are consistently applied across all locations by its personnel and in accordance with the approved final CMP.
- 4.10.6 If the Contractor's administrative and management processes, practices and procedures change during the Contract period, or if VAC requests changes, the Contractor must update or revise the final CMP for DTA approval. The version number and date must be annotated on each final CMP revision or update. Refer to Appendix 14, Deliverable 20.

#### **4.11 Contractor's Communication Packages**

When the Contractor develops communications for recruitment purposes and for circulation to media organizations, the public, industry, educational institutes, etc.; the Contractor must submit the draft communication to the CA and the DTA for review and acceptance before publication. Refer to Appendix 14, Deliverable 21.

- 4.11.1 When the draft is accepted, and approved by the CA and the DTA, the Contractor will receive a confirmation from the DTA.
- 4.11.2 All communications materials developed for circulation for recruitment purposes by the Contractor must be in English and French.

#### **4.12 Probation**

A 90 day probation period will apply to all newly contracted HCPs. The probation period will begin on the first work. If the TM is not satisfied with the services of the contracted HCP, the Contractor has 14 calendar days to remedy the situation. If the situation cannot be resolved to the satisfaction of the TM, the contracted HCP will be replaced at no cost to VAC. Payment for HCPs whom have performance issues shall cease upon termination of their Work under the contract. If a replacement HCP cannot be found by the Contractor, VAC reserves the right to cancel the VAC Task Authorization and VAC will not be held to the cancellation conditions in the Contract.

#### **4.13 HCP Professional Misconduct**

Throughout the In-Service and Out-Going Phases, identification, investigation and management of HCP professional conduct and competency issues are a shared responsibility between the Contractor and VAC. The Contractor and VAC have a responsibility to report HCP Professional Misconduct in accordance with the relevant provincial/territorial statute.

4.13.1 HCP professional performance shall be in accordance with standards set by the applicable licensing body as well as any additional standards imposed by VAC.

4.13.2 The Contractor will be responsible for the remediation of HCP professional performance issues and the determination and execution of any disciplinary measures. VAC reserves the right to determine if the VAC – Task Authorization should be cancelled. If a HCP has his/her license revoked, the contracted HCP will be removed and replaced at no cost to VAC. Payment for HCPs who have misconduct issues shall cease upon termination of their Work under the contract

#### **4.14 Issues, Challenges and Problem Resolution Process**

Throughout the duration of the Contract, the Contractor or the Contractor's HCPs must, as a preliminary step, contact the appropriate authority listed in the Annex A - SOW VAC article titled "Departmental Authorities (DA)" to resolve any issues, challenges and problems at the lowest possible level.

4.14.1 Should the Contractor or the Contractor's HCP contact a DA that is not the responsible authority for the issue, challenge or problem, the Contractor or the Contractor's HCP will be re-directed to the appropriate authority.

4.14.2 The TM is the lowest level for issues, challenges or problems that are within the scope of the TM's authority.

4.14.3 For issues not resolved at the lowest level, the DTA is the authority for issues, challenges or problems regarding the technical content of the Work, requirements and deliverables.

4.14.4 For issues that cannot be resolved at the lowest level, the matter will be referred to the DTA and upward for resolution.

#### 4.15 **HCPC Lessons Learned**

The Contractor must develop and deliver a HCPC Lessons Learned (HCPC LL) document based on their lessons learned for the Start-up and Out-Going phases of the Contract; and on an annual basis for each year of the In-Service Phase of the Contract. Refer to Appendix 14, deliverable 22 for the Start-up Phase, deliverable 23 for the Annual, and deliverable 24 for the Out-Going Phase HCPC LL documents.

4.15.1 The intention is to have all stakeholders benefit and contribute to a formalized Lessons Learned process by implementing a formal HCPC LL process that ensures visibility and accountability using a feedback loop, and which minimizes the repetition of errors, improves service delivery, and results in positive and improved capability or requirements.

4.15.2 The HCPC LL document can incorporate any Contractor's lessons learned but as a minimum, must include the following information:

- a. section for Observation/Issue, which states what the issue, problem, or difficulty was or the "what" part of the phase, activity, requirement or event. The Observation(s) or Issue(s) must be short, factual descriptions of what has occurred, and is used to describe either a positive or a negative event. Multiple observations of a similar nature may be combined into a single issue;
- b. section for Discussion, which includes sufficient details surrounding the observation(s) or issue(s) to provide the reader with an understanding of the phase, activity, requirement or event without being part of the requirement. The details can include "who", "when", "why" and "where" statements;
- c. section for Conclusion, which includes details the overall impact of the observation(s) or issue(s);
- d. section for Recommendations, which includes suggestions or recommendations on how the issue, problem or difficulty can be rectified, reduced or eliminated in the future; and
- e. section for "Point of Contact" (POC) which identifies the appropriate office responsible for the matter based on the issue, problem or difficulty.

4.15.3 The HCPC LL will be provided to the DTA.

#### 4.16 **Timesheet Tool**

The Contractor must have in operation, a Timesheet Tool (TsT), which is accessible from the Contractor's website through a secure site to authorized users that hold various roles. The TsT is intended as a tool for:

- a. HCPs to record their hours worked;
- b. VAC employees to verify and approve the HCP's recorded hours;  
and
- c. the DAs to validate the labour charges on the Contractor's invoice.

4.16.1 The TsT must be accessible through a web portal that requires an encrypted session and is accessible from the following platforms without the installation of additional software:

- a. Microsoft Windows 7 32-bit and 64-bit;
- b. Microsoft Windows 8.1 32-bit and 64-bit;
- c. Microsoft Windows 10 32-bit and 64-bit; and,
- d. macOS.

The Communications Security Establishment guidelines that must be followed are in the following link:

<https://www.cse-cst.gc.ca/en/node/1831/html/26515>

4.16.2 The Contractor must have the TsT ready for use 60 calendar days before the SED, and must provide the DTA with notification that the HCP TsT is setup and ready. Refer to Appendix 14, deliverable 25.

4.16.3 The Contractor's TsT must be available to users, from Monday to Friday, and between the hours of 7am and 6pm across all Canadian Time Zones.

4.16.4 Within five (5) calendar days of setup notification of the TsT, the Contractor must conduct a TsT demonstration for the DAs at a VAC location. The location and address will be provided to the Contractor after Contract award. The demonstration must confirm that the TsT is ready for use and detail how the tool works from a user's perspective. Refer to Appendix 14, deliverable 26.

#### 4.17 **Timesheet Tool Capabilities and Functionalities**

As a minimum, the Timesheet Tool must have the following capabilities and functionalities:

- a. to allow HCPs to record their regular, (and overtime if applicable) hours worked
- b. to allow the TMs to review, validate and approve the HCP recorded hours;
- c. to have an approval indicator that denotes that the recorded hours have been validated;
- d. to set permissions for control over what users can see and do;
- e. to allow for simultaneous access of users;
- f. to allow for storage of HCP timesheets and data;
- g. to secure all data;
- h. to enable reports to be generated from the TsT data and to be able to specify report filters to return the specific results wanted;
- i. to enable queries to be conducted with the available fields in the TsT; to allow for customization or modifications including: modifications of the field names; setting tasks, such as travel; and linking tasks to the timesheet;
- j. to have a data back-up feature;
- k. to allow the exporting of data;
- l. to have printing capabilities; and
- m. must include a User Account Creation Request and Cancellation Form.

#### 4.18 **Timesheet Tool Setup**

As a minimum, the Timesheet Tool must include the following data fields:

- a. Task Authorization number;
- b. HCP location;
- c. HCP surname;

- d. HCP given name;
- e. A separate field to be used by HCP to input hours worked for each day of the week, within the billing period;
- f. sub-total regular hours worked. This field must reflect the total number of regular hours worked within the billing period;
- g. total regular hours worked. This field must reflect the total number of hours worked to date;
- h. sub-total overtime hours worked. This field must reflect the total number of overtime hours worked within billing period;
- i. total overtime hours worked. This field must reflect the total overtime hours worked to date on the VAC Task Authorization;
- j. remaining hours on the VAC Task Authorization. This field must reflect, in hours or days, the Level of Effort (LOE) remaining and in accordance with the VAC Task Authorization;
- k. Travel. This section must reflect the from and to date fields that the HCP is on Travel Status within the billing period;
- l. the approved travel in accordance with the VAC Task Authorization; and
- m. Approval Indicator. This field would identify for the Contractor: if the timesheet was approved or not approved by VAC; the name of the individual who has approved or not approved the timesheet; and must also have a Comment field for information to be inserted by VAC.

#### 4.19 **HCP Timesheet**

As a minimum, the HCP Timesheet must include the following data fields:

- a. Task Authorization number;
- b. HCP location;
- c. HCP surname;
- d. HCP given name;



- e. A separate field to be used by HCP to input hours worked for each day of the week, within the billing period;
- f. sub-total regular hours worked. This field must reflect the total number of regular hours worked within the billing period;
- g. total regular hours worked. This field must reflect the total number of hours worked to date;
- h. sub-total overtime hours worked. This field must reflect the total number of overtime hours worked within billing period;
- i. total overtime hours worked. This field must reflect the total overtime hours worked to date on the VAC Task Authorization;
- j. remaining hours on the VAC Task Authorization. This field must reflect, in hours or days, the Level of Effort (LOE) remaining and in accordance with the VAC Task Authorization;
- k. Travel. This section must reflect the from and to date fields that the HCP is on Travel Status within the billing period;
- l. the approved travel in accordance with the VAC Task Authorization; and
- m. Approval Indicator. This field would identify for the Contractor: if the timesheet was approved or not approved by VAC; the name of the individual who has approved or not approved the timesheet; and must also have a Comment field for information to be inserted by VAC.

#### 4.20 **Timesheet Tool Account Creation Setup**

The Contractor must create user accounts and initial passwords.

- a. all accounts for the Contractor's HCP must be setup and provided before the HCP start date on the Task Authorization;
- b. the Contractor must create a user account for the DTA and VAC local representatives before the TsT demonstration. A VAC local representative is a VAC employee who works at that location. The number of VAC local representative user accounts is estimated as two positions per location with 36 locations totaling approximately 72 accounts for field operations. Six (6) head office accounts will be required in addition to the field operations. The number of

user accounts is subject to change and is based on VAC's requirements. The Contractor will be provided with the names of the DTA and VAC local representatives after Contract Award;

- c. throughout the Contract, the Contractor must create new user accounts within seven (7) days of receipt of the approved User Account Creation Request and Cancellation Form; and
- d. the Contractor must delete old user accounts within seven (7) days of the date stated on the User Account Request and Cancellation Form.

#### **4.21 Timesheet Tool Account Permissions**

The Contractor must set up specific permission for the DAs and VAC local representatives:

- a. the DAs must be given full user access: to view any HCP timesheet; to verify time sheet approvals; to manipulate data; for viewing data; and for generating reports;
- b. the VAC local representatives must be given limited access that allows them to view the information related only to HCPs on Task Authorization at their location; and
- c. the Contractor is responsible to ensure that HCPs do not have access to the timesheet approval field on the TsT.

#### **4.22 Timesheet Tool User Help and Support**

The Contractor must provide help and support functionality for the TsT which, at a minimum, is available to authorized users, from Monday to Friday, and between the hours of 7am and 6pm across all Canadian Time Zones. This functionality must be available by email or telephone.

#### **4.23 Timesheet Tool Maintenance**

The Contractor must conduct updates and maintenance of the TsT outside the working hours of 7am to 6pm across all Canadian Time Zones.

#### **4.24 Timesheet Tool User Training and Manual**

The Contractor must provide TsT training which, at a minimum, contains a computer-based training component and a User Manual, available in both official languages. Refer to Appendix 14, deliverable 25.

#### **4.25 Initial HCP Requirements**

The Contractor will be provided with the Initial HCP Requirement Plan and the associated VAC Task Authorizations after Contract award at the initial Kick-Off meeting.

- 4.25.1 On receipt of the VAC Task Authorizations, the Contractor must follow the task authorization process detailed in the Contract. The Contractor must provide the DTA with the Task Authorization response package for all Task Authorizations issued no later than **40 calendar days** prior to a SED, and all HCPs requirements must start working on SED.
- 4.25.2 All HCP requirements that are identified after the Initial HCP Requirement Plan has been provided to the Contractor, and that have the HCP requirement start date after SED, are considered New HCP requirements. VAC provides New HCP requirements to the Contractor via a VAC Task Authorization. The Contractor must follow the task authorization process detailed in the Contract. The Time To Provide period will apply to all new VAC Task Authorizations.
- 4.25.3 For the New HCP requirements identified in the Annual HCP Requirement Plan, the Contractor must follow the Task Authorization process as detailed in the Contract.

#### **4.26 Acceptable delay**

When the Contractor is not able to fill a VAC Task Authorization in any of the Contract phases, the Contractor must justify the delay, in writing, to the DTA. The DTA will determine if the Contractor will be given an additional 30 calendar day period to fill the Task Authorization, or if the Task Authorization will be cancelled. Refer to Appendix 14, deliverable 27.

- 4.26.1 The Contractor will be given a written notice by the DTA for all approved requests. The VAC Task Authorizations that are not filled will not remain open indefinitely. The DTA will provide the Contractor with the Cancellation of a Task Authorization Notice for the VAC Task Authorization, when the issued Task Authorization is cancelled because it was not filled.

#### **4.27 HCP Credentials**

Throughout the duration of the Contract, the Contractor must verify the HCP credentials before providing HCPs to VAC.

- 4.27.1 The HCP credential verification process is to confirm with their respective regulatory or certifying organization that the HCP:
  - a. holds a valid license or certification;

- b. has no restrictions or limitations against their license or certification and are in good standing; and
  - c. has no sanctions or past findings against their license or certificate.
- 4.27.2 If the HCP is subject of an investigation, is involved in part of an investigation, has restrictions, limitations, sanctions or past findings against their license or certificate, VAC reserves the right to refuse to the proposed HCP.
- 4.27.3 Throughout the duration of the Contract, including the Start-up Phase, when the Contractor provides any HCP, the Contractor must provide a VAC Credential Information Form for that HCP.
- 4.27.4 After the initial Credential Information Form is provided by the Contractor, and throughout the duration of the Contract thereafter, the Contractor must conduct and confirm verification of the HCPs credentials every six (6) months.
- 4.27.5 Throughout the duration of the Contract, the Contractor must conduct the HCP re-verification process and confirm the status via the HCP Credentialing Report, which is detailed under Annex A- SOW VAC article titled "HCP Credentialing Report".
- 4.27.6 Throughout the duration of the Contract, if an HCP credential changes, the Contractor must notify the DTA within the same business day or next business day if following a weekend, if the HCP has had his/her license revoked for whatever reason, or should an HCP become subject of an investigation or involved in part of an investigation. Refer to Appendix 14 Deliverable 28.
- 4.27.7 If an HCP has his/her license revoked, the VAC Task Authorization will be cancelled immediately and VAC will not be held to the cancellation conditions in the Contract.
- 4.27.8 If the HCP becomes the subject of an investigation or is involved in part of an investigation, VAC reserves the right to determine if the VAC Task Authorization should be cancelled or if the Contractor will be requested to replace the HCP.

#### **4.28 HCP Language Requirements**

Throughout the duration of the Contract, the language requirement for the HCP will be specified in VAC Task Authorization as English, French or Bilingual (English and French).

- 4.28.1 The provided HCP must be able to read, comprehend and communicate orally and in writing in the specified language(s).
- 4.28.2 If the HCP's language skills do not meet the requirement as stated on the VAC Task Authorization, VAC reserves the right to cancel the Task Authorization.

## **Part Two – In-Service Phase**

### **4.29 Annual HCP Requirements**

The Contractor will be provided with the Annual HCP Requirement Plan and the associated New VAC Task Authorizations within the first seven (7) days of December each year.

- 4.29.1 For the Recurring HCP Requirements identified in the Annual HCP Requirement Plan, the Contractor must review the list and confirm via the Recurring HCP Task Authorization Confirmation Report within 30 calendar days from receipt whether the incumbent HCPs will continue to provide the services in the upcoming fiscal year. Refer to Appendix 14, deliverable 29.
- 4.29.2 On receipt of the VAC Task Authorizations, the Contractor must follow the Task Authorization process detailed in the Contract. The Contractor must provide the Task Authorization Response Package to the DTA no later than 20 calendar days prior to HCP Start Date. Refer to Appendix 14, deliverable 30.
- 4.29.3 During the In-Service Phase, and after the Annual HCP Requirement Plan has been provided to the Contractor, any New HCP Requirements identified will be provided to the Contractor by the DTA via the VAC Task Authorization(s).

### **4.30 HCPs Orientation to VAC Work Environment**

Upon VAC's request, the Contractor will prepare and deliver an orientation package to new HCPs. In some cases, VAC may provide the orientation to the new HCP. The estimated number of days of training is seven. All orientation and training must be completed within a two-week period of the HCP commencing work.

- 4.30.1 When applicable, the Contractor must provide a signed copy of the Orientation Package – HCP Acknowledgement Form, which is included in the Orientation Package. The Orientation Package – HCP Acknowledgement Form is the confirmation that the HCP has received, read and understood the Orientation Package and the VAC work environment, and agrees to provide services in that environment. Refer to Appendix 14, deliverable 31.

### **4.31 HCP Incoming Clearance Activities**

Throughout the duration of the Contract, all HCPs must undertake Incoming Clearance Activities. Incoming clearance activities are completed by the HCP within the first week of their start date. These activities consist of:

- a. obtaining a VAC building pass;

- b. obtaining various VAC accounts and undertaking associated training. The TM will provide the specific accounts, required forms, associated training links and the organizations responsible for providing these accounts to each HCP. The HCP must fill out and process the account requests. HCPs must comply with all VAC policies and procedures. Failure to comply with policies may result in the cancellation of the Task Authorization.
- c. All Work will done on site with the exceptions of client visits when required.

#### **4.32 HCP Contractor Identification**

Throughout the In-Service and Out-Going Transition phases, HCPs must be identifiable as a Contractor resource.

- 4.32.1 HCPs must include the designation of “Contractor” within their signature block when sending email or writing letters.

#### **4.33 HCP Hours of Work**

Throughout the In-Service and Out-Going Transition Phases, HCPs will be required to work between the core hours of 8am and 5pm local time, Monday to Friday.

- 4.33.1 The hours of work required will be stated in VAC Task Authorization.
- 4.33.2 HCPs will not be required to provide services on Federal Government Holidays as listed at Appendix 17 to Annex A- SOW VAC.

#### **4.34 HCP Overtime**

Throughout the duration of the Contract, HCPs may be required to work overtime. When an HCP is required to work overtime, it will be stated in VAC Task Authorization. Overtime must be authorized in advance by the Task Manager.

- 4.34.1 The Contractor must submit the HCP Overtime Authorization with its invoice. Overtime is billable in accordance with the terms and conditions of the Contract. Refer to Appendix 14, deliverable 32.

#### **4.35 HCP Tele-Health Requirements**

Currently Tele-Health is not used at VAC. Over the life of the contract, there may be a requirement to provide Tele-Health Work.

- 4.35.1 Tele-Health is defined as the delivery of health services via information technologies.
- 4.35.2 The HCP may be requested to use VAC video conferencing facilities to have consultations and discussions.

4.35.3 When Tele-Health Work is required, it will be stated in the VAC Task Authorization.

4.35.4 If Tele-Health Work is not stated on the VAC Task Authorization, and becomes a requirement, the DTA will issue an amendment to the VAC Task Authorization for the Contractor's acceptance.

#### 4.36 **Site Visit Requirements**

On occasion a HCP may be requested to conduct a Site Visit.

4.36.1 The HCP or Contractor must request written approval from the TM by email with a copy to the DTA.

4.36.2 The written approval must contain the following information:

- a. Task Authorization number;
- b. Client file number;
- c. name of the HCP who will conduct the Site Visit(s);
- d. reason for the Site visit(s);
- e. date(s) and time(s) of scheduled Site Visit(s); and,
- f. travel involved with estimated expenses;

4.36.3 The Site Visit is to be conducted during regular work hours but if there is an exceptional need for overtime, the Overtime Request and Authorization process must be followed as detailed under Annex A - SOW VAC article titled "HCP Overtime".

4.36.4 When a Site Visit involves travel outside the designated VAC Location, the HCP Travel Request and Authorization process must be followed as detailed under Annex A - SOW VAC article titled "HCP Travel".

4.36.5 The Contractor must submit the complete approval package, travel itinerary, claimable expenses and receipts with the invoice. Refer to Appendix 14, deliverable 33.

#### **4.37 HCPs Travel**

Throughout the In-Service and Out-Going phases, HCPs may be required to travel. When an HCP is required to travel, it will be pre-approved via the VAC Task Authorization.

- 4.37.1 When an HCP is requested to travel and the travel requirement is not stated in VAC Task Authorization, the HCP must receive written approval, via email, from the TM before the travel is conducted.
- 4.37.2 The Contractor or Contractor's HCP will provide the Travel Request Form to the TM by email, (copying the DTA), for approval.
- 4.37.3 The Contractor must make all travel arrangements. Travel must be conducted in the most economical means available and in accordance with the Treasury Board Travel Directive.
- 4.37.4 The Contractor must submit the HCP Travel expenses with the original receipts with their invoice for re-imbursement in accordance with the terms and conditions of the Contract. Refer to Appendix 14, deliverable 34.

#### **4.38 HCP Qualification Training**

Throughout the duration of the Contract, the Contractor is responsible for any HCP qualification training or training that is necessary for the HCP to maintain their specific qualifications and credentials such as re-training or re-certifications.

- 4.38.1 HCP training costs, travel costs associated with training, and time absence are not billable to VAC.
- 4.38.2 The Contractor must provide the DTA with a minimum of 14 calendar days advance written notice when an HCP will be absent for training purposes. The training period must not exceed 14 calendar days. The notice must contain the HCP name, Task Authorization number, name of training, and dates and duration of training.
- 4.38.3 If the training exceeds 14 calendar days, the conditions under Annex A- SOW VAC article entitled "HCP Long Term Absences" article will apply.

#### **4.39 VAC Unique Specialization Training**

Throughout the duration of the Contract, the Contractor is responsible for any required HCP training, re-training or certification costs, plus any travel costs associated with the training.



4.39.1 Specialized Training that is unique to VAC may not be accessible to the Contractor. On a case-by-case basis and at its discretion, VAC may offer, VAC specialized training to the Contractor for its HCPs.

4.39.2 If Specialized Training that is unique to VAC is offered by VAC to the Contractor, the costs charged to the Contractor will be the same costs per person as would be charged for a VAC public service employee. Travel costs associated with the training and time absent are not to be billable to the VAC. If VAC requires the HCP to take the specialized training, VAC will cover the cost.

#### 4.40 **HCP Holidays**

Throughout the In-Service and Out-Going Phases of the Contract, the Contractor must provide the DTA with 14 calendar days written notice when an HCP is planning holidays for a period of 14 calendar days or less. Written notice of 21 calendar days must be provided when an HCP is planning holidays for a period greater than 14 calendar days.

#### 4.41 **HCP Short-Term Absences**

Throughout the In-Service and Out-Going Phases of the Contract, the Contractor must advise the DTA and TM in writing by email, when any of its HCPs will be absent from the work location. Short-term absence is defined as 21 calendar days or less.

#### 4.42 **HCP Long Term Absences**

Throughout the In-Service and Out-Going Phases of the Contract, the Contractor must provide the TM and TA with 42 calendar days written notice when an HCP is planning to be absent for a period greater than 21 calendar days. The DTA may request that the Contractor replace the HCP or deny some or all of the leave should VAC not have adequate staffing available to deliver the services.

4.42.1 If the HCP absence is unplanned and the HCP will be absent for a period greater than 21 calendar days, the Contractor must provide written notice to the TM and DTA when it is advised by the HCP. The DTA may request that the Contractor replace the HCP, temporarily.

4.42.2 When the HCP is replaced temporarily, VAC Task Authorization must be amended. The Contractor's replacement HCP must meet all the qualifications for the HCP category; must not be under another VAC Task Authorization for same hours of work or schedule; and must not be a transferred HCP from another VAC Task Authorization, creating another unfilled Task Authorization elsewhere, unless accepted by VAC in some particular circumstances.

- 4.42.3 If the Contractor cannot provide a replacement HCP temporarily, the VAC Task Authorization may be cancelled. If the VAC Task Authorization is cancelled; a new VAC Task Authorization may be issued to the Contractor by VAC, the Time To Provide section of the Contract applies.

**4.43 HCP Departures while on a Task Authorization**

Throughout the In-Service and Out-Going Phases of the Contract, the Contractor must provide 14 calendar days written notice to the TM and TA when an HCP is planning to depart while on a Task Authorization. The Task Authorization will be cancelled and the Contractor may be provided a new VAC Task Authorization.

**4.44 VAC Cancellation of a Task Authorization**

Throughout the In-Service and Out-Going Phases of the Contract, when the services of an HCP are no longer required, VAC will give the Contractor a minimum of 14 calendar days notice of a Cancellation of a Task Authorization. The minimum of 14 calendar day period is not required when a Task Authorization is cancelled as a result of the Contractor not meeting the timeframe for the replacement of an HCP, or for HCP Short Term and Long Term absence.

**4.45 HCP Providing Advice in Support of Legal or Administration Proceedings**

Throughout the In-Service and Out-Going Phases, HCPs may be asked to attend administrative or legal proceedings.

- 4.45.1 When HCPs are requested to participate in administrative or legal proceedings, the HCP will be given the time to do so and the time will be paid in accordance with the rate on the HCP's VAC - Task Authorization.
- 4.45.2 When a HCP participation in administrative or legal proceedings involves travel outside the Designated VAC Location, the HCP Travel Request and Authorization process must be followed as detailed under the Annex A - SOW VAC article titled "HCP Travel".
- 4.45.3 The Contractor must submit the complete approval package, travel itinerary, claimable expenses and receipts with the invoice.
- 4.45.4 If the request for a HCP participation in administrative or legal proceedings necessitates changes and updates to the original VAC - Task Authorization, the Contractor's HCP cannot conduct the HCP participation in administrative or legal proceedings until the Contractor receives an approved VAC - Task Authorization amendment.

#### **4.46 Meetings**

The Contractor's appropriate CMT or CCO personnel must attend various meetings throughout the duration of the Contract.

- 4.46.1 The SDM or DSDM must attend all required meetings.
- 4.46.2 The Contractor must determine who from its CMT or CCO will be required to attend each type of meeting. The Contractor's personnel who are attending should be determined by the agenda items to be discussed and the Action Items Log (AIL).
- 4.46.3 The Contractor will be responsible for making all travel arrangements for their personnel attending meetings.
- 4.46.4 All Contractor or CMT and CCO personnel travel costs related to attending any of the required meetings will be borne by the Contractor and are not to be invoiced to VAC.

#### **4.47 Initial Kick-Off Meeting**

The Contractor will be required to attend an Initial Contract Kick-Off Meeting in the Start-Up Phase. As a minimum, the Contractor's senior representative and SDM must attend this meeting and may include other Contractor personnel it deems appropriate.

- 4.47.1 The Initial Contract Kick-off meeting must take place within fourteen (14) calendar days after contract award. The DTA will advise the Contractor of the date and address of the meeting.
- 4.47.2 The duration of the meeting is anticipated to be three (3) to five (5) calendar days.
- 4.47.3 This meeting will be co-chaired by the Contractor and the DTA and will include, as a minimum, the following Agenda items:
  - a. review of the Contract including the SOW;
  - b. an overview of the Contractor's Management Plan;
  - c. an overview of the Contractor's Organization;
  - d. an overview of the Contractor's Start-up Plan and Schedule;
  - e. an overview of the Contractor's Recruitment Strategy;
  - f. an overview of the Contractor's Risks and Risk Analysis and the methods or procedures by which the impact of these risks will be mitigated and managed;

- g. confirmation of the names, title(s), roles and responsibilities plus contact information for the primary Points Of Contact (POC) for CCO and CMT personnel;
- h. confirmation of the CCO and CMT structure; and
- i. other items, as required.

4.47.4 The Agenda for the Initial Contract Kick-Off Meeting will be prepared by the DTA.

4.47.5 The DTA will distribute the Agenda to all meeting participants.

4.47.6 The minutes of the meetings will be prepared by the Contractor in accordance with the Annex A - SOW VAC article titled "Minutes of the Meetings" and provided by the Contractor to the DTA and all attendees within seven (7) calendar days following the date of the meeting. Refer to Appendix 14, deliverable 35.

4.47.7 The minutes will be signed by the Chairs.

4.47.8 Should there be any action items resulting from the Initial Kick-off meeting, the Contractor will prepare the Action Item Log (AIL) in accordance with the Annex A - SOW VAC article titled "Action Item Log (AIL)". The AIL must be provided with the Minutes. Refer to Appendix 14, deliverable 36.

4.47.9 The Contractor will coordinate responses to Action Items from the responsible parties and update the AIL.

4.47.10 All Action Items resulting from the Initial Contract Meeting must be responded to within 10 calendar days following the date of the meeting or by the date(s) agreed to at the Initial Contract Kick-Off Meeting.

4.47.11 The updated AIL will be distributed by the Contractor to all attendees within 15 calendar days from the date of the meeting and will contain all responses for the Action Items assigned to all parties. Refer to Appendix 14, deliverable 37.

#### 4.48 **Progress Review Meetings**

The Contractor must organize and hold Progress Review Meetings (PRM) in the National Capital Region or in Charlottetown, PEI, or by teleconference. The DTA will determine where and how the meeting will take place. The meetings will have the following frequency:

- a. during the Start-up and Out-going Phases, as frequently as determined necessary by the DTA but no more than once per month; and
- b. during the In-Service Phase, on a semi-annual basis within the first 10 days after the end of the September and March, unless agreed otherwise.

4.48.1 If agreed by the DTA in advance, the PRM may be held via videoconference or teleconference.

- 4.48.2 As a minimum, the SDM or ASDM must attend this meeting and may include other Contractor personnel it deems appropriate.
- 4.48.3 The PRMs will be co-chaired by the DTA and the Contractor.
- 4.48.4 The PRMs are anticipated to range from a half-day (1/2) up to, two (2) full days (15 hours) in duration. Duration will be based on the Agenda and Action Items to be discussed.
- 4.48.5 The Contractor will prepare the PRM Agenda and provide to the DTA for approval a minimum of ten (10) calendar days before PRM meeting. Refer to Appendix 14, deliverable 38.
- 4.48.6 Once the PRM Agenda is approved, the Contractor will distribute it to all meeting attendees a minimum of five (5) calendar days before the meeting. Refer to Appendix 14, deliverable 39.
- 4.48.7 The Agenda will include:
- a. the purpose of the meeting;
  - b. the location;
  - c. the date and estimated duration of the meeting;
  - d. the proposed list of topics and sub-topics to be discussed plus the time allocated to each discussion item; and
  - e. the name of the party and individual responsible for addressing each topic or sub-topic included.
- 4.48.8 The topics for presentation and discussion at PRMs may include:
- a. opening remarks;
  - b. agenda review;
  - c. review of previous Minutes (if applicable);
  - d. current status or changes to the Contractor's Plans;
  - e. status of Contractor's Work and activities during the PRM period;
  - f. discussions on Contractor's Reports during the PRM period;
  - g. review of Contractor's performance;
  - h. problem or issue reviews and Lessons Learned (LL);

- i. review of closed Action Items during the PRM period;
  - j. status of current Action Items;
  - k. new problem or issue areas and corrective measures or action plans;
  - l. new discussion items;
  - m. plans for next reporting period;
  - n. round table discussion;
  - o. next meeting date; and
  - p. closing remarks.
- 4.48.9 The Contractor must provide its planned action(s) to address all discrepancies identified in the PRM in accordance with the time period and schedule agreed to at the PRM.
- 4.48.10 The Contractor must prepare the minutes of the PRM in accordance with the Annex A - SOW VAC article titled "Minutes of the Meetings" and provide to the DTA for approval ten (10) calendar days after the PRM. Refer to Appendix 14, deliverable 40.
- 4.48.11 The Contractor must correct any discrepancies noted in the minutes of the PRM within three (3) calendar days of notification by the DTA and subsequently distribute to all meeting attendees within seven (7) calendar days of the meeting.
- 4.49 Ad Hoc Meetings**
- Ad Hoc Meetings are meetings that may be conducted when necessary to respond to urgent or unforeseen requirements, technical Work, contract or program management activities or issues, and contractual obligations. Ad Hoc meetings are to be kept to a minimum and only take place if necessary.
- 4.49.1 Ad hoc meetings can be requested by either Canada or the Contractor. The party requesting the Ad hoc meeting may invite representatives it deems appropriate.
- 4.49.2 The party requesting an urgent Ad Hoc Meeting must provide the requested participants with a written notice at least one (1) working day prior to the meeting. The meeting should take place within two (2) working days of said notice.
- 4.49.3 The party requesting a non-urgent Ad Hoc Meeting must provide the requested participants a minimum of five (5) working days written notice and the meeting will take place at a time agreed to by the parties.
- 4.49.4 Ad Hoc meetings must be held at a location that is mutually acceptable to all parties or by teleconference, videoconference or Web conference if acceptable by all parties.

4.49.5 The party requesting the Ad Hoc meeting must organize and chair the meeting as well as prepare and provide the Agenda. As a minimum, the Agenda must include:

- a. the purpose of the meeting;
- b. the location;
- c. the date and estimated duration of the meeting;
- d. the proposed list of topics and sub-topics to be discussed plus the time allocated to each discussion item; and
- e. the name of the party and individual responsible for addressing each topic or sub-topic included.

4.49.6 The Contractor must prepare and distribute the Minutes of the Ad Hoc meeting in accordance with the Annex A - SOW VAC article titled "Minutes of the Meeting", and the resulting Action Items Log and follow up actions in accordance with the Annex A - SOW VAC article titled "Action Item Log".

4.49.7 The costs associated with hosting the Ad Hoc Meetings will be borne by the party requesting the meeting.

4.49.8 All costs incurred in the attendance of Ad Hoc Meetings such as preparation, facility cost, and travel will be the responsibility of each of the parties required to participate in the meeting.

#### 4.50 **Minutes of the Meetings**

Minutes of the meetings will be required, throughout the duration of the Contract, for each meeting or review held and must include and document all information required to provide an accurate record of the content of the meeting or review.

4.50.1 The minutes are prepared and distributed by the Contractor. All parties who receive copies of the minutes are responsible to indicate required changes within three (3) calendar days of receiving the minutes. Once approved by the parties, the Contractor will distribute copies of the minutes to all the participants within seven (7) calendar days.

4.50.2 The minutes must include, as a minimum, the following sections:

- a. a title page containing the title or purpose of the meeting, meeting number, date and location;
- b. identification of the Contract number;
- c. list of invitees' names, titles, and contact particulars (telephone and email addresses);
- d. copy of the Agenda;

- e. sections for: the Opening Remarks, Agenda Review, Review of Previous Minutes (if applicable), Open Discussion Items, New Discussion Items, and Review of Previous and New Action Items, Next Meeting, and Closing remarks;
- f. a detailed summary of the proceedings, discussions, agreements or decisions reached or taken and by whom;
- g. the Action Item Log must be attached and include any responses provided from any of the attendees at the meeting; and
- h. signature page with spaces for the Contractor, and the CA or the DTA as applicable.

4.50.3 All Minutes prepared must be approved and signed by the applicable DA before distribution.

#### 4.51 **Action Item Log**

The Action Item Log (AIL) is a living document that details all Action Items related to all aspects of the Contract. The AIL is a follow-on document from the Initial Contract Kick-Off Meeting and runs for the duration of the contract.

4.51.1 The Contractor must prepare and maintain the AIL. Refer to Appendix 14, Deliverable 36.

4.51.2 The AIL must provide a consolidated list of all actions to be taken by each party.

4.51.3 The AIL must include, as a minimum, the following sections:

- a. serial number;
- b. item;
- c. description of the action to be taken;
- d. cross-reference to the minutes;
- e. indication of the person who is responsible for action;
- f. estimated target date for completion of action; and
- g. status indicator on whether the Action Item is open or closed.

4.51.4 All Action items will remain open until there is a decision recorded in minutes of meetings to close the item.

4.51.5 The updated version of the AIL must be distributed by the Contractor with meeting minutes to all participants. Refer to Appendix 14, Deliverable 37.



#### 4.52 **REPORTS**

The Contractor must prepare and provide various reports throughout the duration of the Contract.

#### 4.53 **Start-Up Phase Reports**

During the Start-Up Phase of the Contract, the Contractor must prepare and deliver monthly Start-Up Phase Status Reports. Refer to Appendix 14, Deliverable 42.

4.53.1 The report must show all Work undertaken, including Work in progress against the Start-Up schedule and must:

- a. present an overview of all activities that have taken place in the reported period, those planned but that have not taken place in the reported period, and those that are planned for the following period; and
- b. address the activities including all scheduled events or milestones, conducted activities, major accomplishment, non-conducted planned activities and missed schedule activities, including delay reasons, current status of problems, action items taken or planned to resolve, impacts, impacts to the schedule, forecasted problems, recommendations or solutions to any issues or problems, and planned activities for the following period.

#### 4.54 **Task Authorization Status Report**

The Contractor must prepare and deliver a Task Authorization Status Report monthly, commencing after the Initial Kick-Off Meeting, for the duration of the Contract. Refer to Appendix 14, Deliverable 43.

#### 4.55 **HCP Credentialing Report**

The Contractor must prepare and deliver a HCP Credentialing Report prior to SED and for each six (6) months thereafter for the duration of the Contract. Refer to Appendix 14, Deliverables 44 and 45.

4.55.1 The report, as a minimum, must include the following information for each HCP:

- a. Task Authorization number;
- b. location;
- c. occupation category;
- d. HCP name;

- e. credential type (e.g. licence, insurance, registration, certification, education, etc.);
- f. credential description (e.g., name, regulatory body, level of education, etc.)
- g. status (e.g. confirmed, pending, expired, etc.); and
- h. expiry date.

#### **4.56 HCP Travel Report**

Throughout the duration of the Contract, the Contractor must prepare and deliver a monthly HCP Travel Report. Refer to Appendix 14, Deliverable 46.

4.56.1 The report is to be provided with the invoice but should be able to be generated through the Timesheet Tool. The report, as a minimum, must list:

- a. every HCP authorized to travel under the Contract; and
- b. include for each HCP the following distinct data elements:
  - (1) Task Authorization number;
  - (2) province;
  - (3) location;
  - (4) occupation and category;
  - (5) HCP surname;
  - (6) HCP given name;
  - (7) HCP start date;
  - (8) Task Authorization period (period of Travel);
  - (9) status (fulltime or part-time);
  - (10) total Task authorization travel amount;
  - (11) total travel costs expended during the reporting period;
  - (12) total accumulated travel costs to date.

#### **4.57 HCP Labor and Overtime Report**

Throughout the duration of the Contract, the Contractor must prepare and deliver a monthly HCP Labor and Overtime Report. Refer to Appendix 14, Deliverable 47.

4.57.1 The report is to be provided with the invoice, but should be able to be generated through the Timesheet Tool. The report, as a minimum, must include:

- a. every HCP authorized to perform Work under the Contract;
- b. Task Authorization number;

- c. location;
- d. occupation and category;
- e. HCP surname;
- f. HCP given name;
- g. HCP start date;
- h. Task Authorization end date;
- i. authorized level of effort which is authorized hours of Work per week (regular and overtime hours if applicable) for the current month;
- j. actual level of effort which is actual hours worked per week (regular and overtime hours if applicable) for the current month;
- k. total cost for current month;
- l. total costs incurred over duration of Contract; and
- m. total Task Authorization authorized value.

#### **4.58 Recurring HCP Task Authorization Confirmation Report**

Throughout the duration of the Contract, the Contractor must prepare and deliver an Annual Recurring HCP Task Authorization Confirmation Report. Refer to Appendix 14, Deliverable 48.

##### **4.58.1 The report, as a minimum, must include:**

- a. all HCPs whom have committed to continuing on the recurring Task Authorization;
- b. Task Authorization number;
- c. location;
- d. occupation and category;
- e. HCP surname;
- g. HCP given name;
- h. HCP start date;

- i. Task Authorization end date;
- j. authorized level of effort which is authorized hours of Work per week (regular and overtime hours if applicable) for the year;
- k. actual level of effort which is actual hours worked per week (regular and overtime hours if applicable) for the year;

### **Phase Three-Out-Going Phase**

#### **4.59 Out-Going Phase Plan**

The Contractor must develop and deliver a draft and final Out-Going Phase Plan that will outline outgoing activities and will propose timings for the range of deliverables listed below. Refer to Appendix 14, deliverable 49 and 50. The draft Out-Going Phase Plan must be presented at the Out-Going Phase Kick-Off Meeting.

4.59.1 The Out-Going Phase Plan can incorporate any out-going activities and practices but as a minimum, must include the following:

- a. a list and description of Contractor out-going activities to be completed and the major milestones to be achieved during the Out-Going Phase to allow for orderly and timely transition and fully meet all the Annex A - SOW VAC requirements;
- b. a schedule, which states the proposed timelines or timeframes for all activities and sub-activities related milestones, all dependencies, and the critical path; and
- c. the Contractor's Senior Management structure for the Contract Out-Going Phase, including but not limited to: the Contractor's Out-Going Phase Management Team. The structure must indicate where participation is required or may be requested from the DTA, and what processes and procedures are recommended to ensure quick decision-making within the plan to facilitate the timely delivery of services.

4.59.2 The Contractor must revise and update, within 10 calendar days, the draft Out-Going Phase Plan if comments or recommendations are received from the DTA. Refer to Appendix 14, deliverable 50.

4.59.3 Once the Out-Going Phase Plan is approved by the DTA, it will be deemed the final Out-Going Phase Plan.

4.59.4 The Contractor must implement and carry out all out-going activities in accordance with the approved Out-Going Phase Plan during the Out-Going Phase.

**4.60 Out-Going Phase Kick-Off Meeting**

The Contractor will be required to attend an Out-Going Phase Kick-Off Meeting in the Out-Going Phase. As a minimum, the Contractor's senior representative and SDM must attend this meeting and may include other Contractor's personnel it deems appropriate.

4.60.1 The Out-Going Phase Kick-Off Meeting must take place within 30 calendar days after the Contractor has been officially notified of the commencement of the Out-Going Phase by the CA. The DTA will advise the Contractor of the date and address of the meeting.

4.60.2 The duration of the meeting is anticipated to be one (1) to two (2) calendar days.

4.60.3 This meeting will be co-chaired by the Contractor and DTA and will include, as a minimum, the following Agenda items:

- a. an review of the Contractor's Out-Going Phase Plan and Schedule;
- b. an review of the Contractor's Risks and Risk Analysis and the methods or procedures by which the impact of these risks were mitigated and managed;
- c. confirmation of the CCO and CMT structure for the Out-Going Phase;  
and;
- d. other items as required.

4.60.4 The Agenda for the Out-Going Phase Kick-Off Meeting will be prepared by the Contractor no less than five (5) calendar days before the meeting.

4.60.5 The minutes of the meetings will be prepared by the Contractor in accordance with the Annex A - SOW VAC Section titled "Minutes of the Meetings" and provided to the DTA and all attendees within seven (7) calendar days following the date of the meeting.

4.60.6 The minutes will be signed by the Chairs.

4.60.7 Should there be any action items resulting from the Out-Going Phase Kick-Off Meeting, the Contractor will prepare the Action Item Log (AIL) in accordance with the Annex A -

SOW VAC article titled "Action Item Log (AIL)". The AIL must be provided with the minutes.

4.60.8 The Contractor will coordinate responses to Action Items from the responsible parties and update the AIL.

4.60.9 All Action Items resulting from the Out-Going Phase Kick-Off Meeting must be responded to within 10 calendar days following the date of the meeting or by the date agreed upon at the Out-Going Phase Kick-Off Meeting.

4.60.10 The updated AIL will be distributed by the Contractor to all attendees within 15 calendar days from the date of the meeting and will contain all responses for the Action Items assigned to all parties.

#### 4.61 **Out-Going Phase Contract Summary Reports**

During the Out-Going Phase, the Contractor may be requested to:

- a. provide Contract summary reports such as, but not limited to:
  - (1) reports generated through the Timesheet Tool;
  - (2) Final HCP Certifications Report;
  - (3) Final HCP Labour Report (Regular and Overtime if applicable);
  - (4) Final HCP Travel Report; and
  - (5) Final HCP Credentialing Report;
- b. export data electronically from the Timesheet Tool for accounting purposes, retention and audit requirements; and
- c. provide Final Lessons Learned documents.

#### 4.62 **Final Progress Review Meeting**

During the Out-Going Phase, the Contractor and its appropriate personnel must attend a Final Progress Review (FPR) meeting. The purpose of the FPR will be to perform a complete review of all of the Contractual requirements, deliverables, remaining or

outstanding PRM Action Items, and to discuss the Contractor's last closing invoice, to ensure all Contractual obligations are completed and the Contract can be closed.

- 4.62.1 The FPR meeting will take place no more than 30 and no less than 20 calendar days before the Contract expiry date. The CA will advise the Contractor of the date and address of the meeting. As a minimum, the Contractor's senior representative and SDM must attend this meeting and may include other Contractor personnel it deems appropriate.
- 4.62.2 The meeting duration is anticipated to be approximately three (3) to five (5) calendar days.
- 4.62.3 This meeting will be co-chaired by the CA and the DTA and will include, as a minimum, the following Agenda items for review and discussion:
  - a. Contractual requirements and deliverables;
  - b. remaining or outstanding PRM Action Items;
  - c. Contractor's Out-Going Phase Activities;
  - d. Contractor's closing invoice; and
  - e. other items, as required.
- 4.62.4 The Agenda for the FPR Meeting will be prepared by the Contractor and provided to the DTA no less than seven (7) calendar days before the meeting.
- 4.62.5 The minutes of the meeting will be prepared by the Contractor in accordance with the Annex A - SOW VAC article titled "Minutes of the Meetings" and provided to all attendees within seven (7) calendar days following the date of the meeting.
- 4.62.6 The minutes will be signed by the Chairs.
- 4.62.7 Should there be any action items resulting from the FPR meeting, the Contractor will prepare the Action Item Log (AIL) in accordance with the Annex A - SOW VAC article titled "Action Item Log (AIL)". The AIL must be provided with the minutes.
- 4.62.8 The Contractor will coordinate responses to Action Items from the responsible parties and update the AIL.
- 4.62.9 All Action Items resulting from the FPR meeting must be responded to and closed before the Contract expiry date.

## 5.0 **DELIVERABLES**

The Contractor must prepare and provide all deliverables in the consolidated table found in Appendix 14 to Annex A – SOW VAC.

The table specifies:

- a. the number of the Deliverable;
- b. the SOW Reference;
- c. the Deliverable description;
- d. the required delivery format(s) (electronic or paper, or both);
- e. whether the Deliverables are being provided for Approval or Information;
- f. Frequency of delivery;
- g. required delivery date;
- h. the authority/authorities to whom the Deliverables are to be provided.

5.1 All deliverables are to be in English only.

5.2 The Contractor must ensure that all deliverables have a cover page and the cover page must indicate the deliverable number, deliverable name, whether it is an original submission or re-submission, draft or final version (if applicable), and date in the format of DD-MM-YY.

5.3 All deliverables must:

- a. be formatted to fit on Letter size paper (8.5 x 11) unless doing so make the content illegible, in which case, larger size paper may be used;
- b. be provided in Microsoft Office format;
- c. be legible and suitable for reproduction;
- d. not be password protected; and
- e. have pages numbered sequentially.

5.4 The process for approval of deliverables is as follows:

- a. the DTA will acknowledge receipt of all deliverables within five (5) calendar days;
- b. within 20 calendar days of receipt, the DTA will review all deliverables;



- c. the DTA will advise the Contractor, via e-mail, if the deliverable has been approved or rejected;
- d. if deliverable is rejected by the DTA, a notice of the deficiency(ies) will be provided;
- e. the Contractor must address the deficiency(ies) noted and resubmit the corrected deliverable within seven (7) calendar days from the date of notification; and
- f. the DTA will have an additional 14 calendar days to review and approve or reject the resubmitted deliverable.

## **6.0 GOVERNMENT FURNISHED RESOURCES**

Government Furnished Resources (GFR) are Canada-owned Government Furnished Equipment (GFE), Government Supplied Material (GSM), and Government Furnished Information (GFI) that VAC will make available for use by the Contractor or Contractor's HCPs.

- 6.1 All GFE, GSM, and GFI provided to the Contractor or to the Contractor's HCPs in support of performing the Work under the Contract, will be provided to the Contractor, Free of Charge (FOC).
- 6.2 The Contractor HCPs must ensure that any GFE or GSM provided are returned in satisfactory condition, subject to normal wear and tear, to VAC upon completion of the Work under the Task Authorization.
- 6.3 Cost recovery action will be taken for any GFE or GSM lost or damaged excluding normal wear and tear.
- 6.4 VAC will provide the following GFE for each HCP:
  - a. all office related equipment necessary to support HCP tasks, such as office space, desk, chair, computer, printer access; and
  - b. medical equipment and supplies, as required to perform Pension Medical Exams.
- 6.5 VAC will provide the following GSM for each HCP:
  - a. all office related supplies required to perform HCP tasks such as pens, paper, forms, etc.; and
  - b. all medical consumables used in conducting Pension Medical Exams.

Any HCP ergonomic equipment, specialized equipment or material requested, are the responsibility of the Contractor.

## **7.0 Ownership and Control**

All information (personal or otherwise) which is used, processed, handled, stored, and recorded by the Contractor for the purposes of fulfilling the requirements of the Contract, regardless of the format, medium, and physical characteristics, remains under the ownership and control of VAC. All applicable Federal legislations apply under all circumstances, even when such information is in the sole custody of the Contractor.

In accepting this Contract, the Contractor acknowledges that VAC maintains ownership and control over all personal information and any other information that is collected, created, captured, received, used, processed, handled, stored, and recorded by the Contractor when fulfilling the requirements outlined in the Contract.

Upon delivery of the final requirements of the Contract, the Contractor will ensure that all information referenced above is returned to the DTA.

## **7.1 Access to Information and Privacy**

The Contractor agrees and understands that information under the ownership of VAC as defined in section 7, (whether in the possession of the Contractor or VAC) is subject to the terms and conditions of the *Access to Information* and the *Privacy Act*.

Should the Contractor receive a request for information from a third party, relating to VAC information (whether in the possession of the Contractor or VAC) for the purposes of the Contract, the Contractor must advise the DTA. Following the consultation with the VAC Access to Information and Privacy Coordinator, the DTA will provide the Contractor with guidance and direction on handling the request.

For the purpose of this Contract, personal health information will be referred to as personal information as defined in Section 3(b) of the *Privacy Act*.

## **7.2 Privacy Impact Assessment**

The Contractor must provide, within thirty (30) calendar days, any requested information required to complete or update the Privacy Impact Assessment (PIA).

- a. The DTA may be required to formulate, and routinely update, a comprehensive Privacy Impact Assessment (PIA) as part of the transition and ongoing administration for the Contract.
- b. The PIA may include, but is not limited to, business process descriptions, business process diagrams, data and information flow diagrams, data and information flow tables,

segregation and security documentation, systems diagrams and specification, and an overview of organizational structure. The DTA may request the information and/or records at any time from the Contractor. This includes any records that are transferred to the Contractor or sub-contractor, or collected, created, obtained or maintained by the Contractor or sub-contractor in fulfilment of the responsibilities stated elsewhere in the Contract.

- c. The Contractor must be responsible for providing access to its facilities and all documentation and resources associated with the Contract, and will provide the DTA access to desk space, telephones, computers, etc. to conduct the assessment. The Contractor must work with the DTA to address any deficiencies or recommendations as a result of the PIA.
- d. Upon completion of a PIA, the Contractor must develop and implement a Corrective Action Plan, approved by DTA, including a schedule for implementation of corrective actions, to correct deficiencies identified within the PIA.
- f. Provision of information by the Contractor to DTA in support of the PIA will be at the Contractor's own expense.

### 7.3 **Breach of Privacy or Security**

a. The Contractor shall notify, in writing, the DTA immediately upon becoming aware of an occurrence of breach of privacy or of the security requirements. This includes but is not limited to:

- Unauthorized access to or modification of the personal information in its custody;
- Unauthorized use of the personal information in its custody;
- Unauthorized disclosure of the personal information in its custody;
- A breach of privacy or security with respect to personal information in its custody or with respect to any computer system in its custody and that may be used to access personal information.

b. The Contractor and VAC shall work to achieve resolution and compliance with Government of Canada Privacy and Security requirements.

c. Any loss, suspected loss, theft or unauthorized disclosure or access to information must be reported immediately with the following details:

- The date and place of the incident;
- The circumstances surrounding the incident;
- A description of the information involved;
- The extent of known or probable compromise and the identity of unauthorized persons who had or are believed to have had access to the information;
- The action or contemplated to remedy the situation; and,

- Any further details which may assist in assessing the loss or compromise.
- d. A follow-up report on an event must be forwarded promptly with the results of any investigation conducted following the initial search and notification, including corrective measures that have been or are being taken to prevent the recurrence of a security and/or privacy incident. The Contractor will notify the DTA if the information is subsequently found, including the circumstances under which it is found.

Standard Operating Procedures for this section of the Contract shall be developed during the contract implementation phase and should include the details noted above.