



RETURN BIDS TO:

RETOURNER LES SOUMISSIONS À:

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

189 Prince William St Rm 405

189, rue Prince William, pièce 405

Saint-John, NB E2L 2B9

Bid Fax: (506) 636-4376

REQUEST FOR PROPOSAL DEMANDE DE PROPOSITION

Proposal To: Public Works and Government Services Canada

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

Proposition aux: Travaux Publics et Services Gouvernementaux Canada

Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées ou incluses par référence dans la présente et aux annexes ci-jointes, les biens, services et construction énumérés ici sur toute feuille ci-annexée, au(x) prix indiqué(s).

Comments - Commentaires

All enquiries are to be submitted in writing to the Contracting Officer, Janine Donovan: Email - janine.donovan@pwgsc.gc.ca.

Vendor/Firm Name and Address

Raison sociale et adresse du
fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution

Saint John, NB (STJ)

189 Prince William St., Rm 405

189, rue Prince William, Pc 405

St. John, NB E2L 2B9

Title - Sujet Career Transition Services	
Solicitation No. - N° de l'invitation 51019-176003/A	Date 2017-09-14
Client Reference No. - N° de référence du client 51019-176003	
GETS Reference No. - N° de référence de SEAG PW-\$STJ-002-4185	
File No. - N° de dossier STJ-7-40063 (002)	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2017-10-16	Time Zone Fuseau horaire Atlantic Daylight Saving Time ADT
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Donovan (STJ), Janine E.	Buyer Id - Id de l'acheteur stj002
Telephone No. - N° de téléphone (506) 636-5347 ()	FAX No. - N° de FAX (506) 636-4376
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: DEPARTMENT OF VETERANS AFFAIRS 161 GRAFTON ST P.O.BOX 7700 (IB 018) CHARLOTTETOWN Prince Edward Island C1A8M9 Canada	

Instructions: See Herein

Instructions: Voir aux présentes

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

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51019-176003/A
Client Ref. No. - N° de réf. du client
51019-176003

Amd. No. - N° de la modif.
File No. - N° du dossier
STJ-7-40063

Buyer ID - Id de l'acheteur
stj002
CCC No./N° CCC - FMS No./N° VME

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PART 1 - GENERAL INFORMATION

1.1 Introduction

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

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;
- Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;
- Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;
- Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by Bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include the Statement of Work, the Basis of Payment, the Technical Evaluation Criteria, the Security Requirements Checklist, the Electronic Payment Instruments, the Federal Contractors Program for Employment Equity – Certification and the Complete List of Each Individual Who are Currently Directors and/or Owners of the Bidder.

1.2 Summary

- 1.2.1 Veterans Affairs Canada (VAC) is mandated to deliver Career Transition Services to eligible Canadian Armed Forces (CAF) members, Veterans, Spouses/common-law partners and survivors. VAC is seeking a Contract for the delivery of this program on behalf of VAC, thereby assisting these client groups to successfully plan for, prepare for and obtain suitable civilian employment upon leaving the military and for the rest of their working life. The services are to be delivered across Canada. VAC is also mandated to deliver the Veteran's Education and Training Benefit (ETB) to eligible Veterans to help them achieve their education and post-military transition goals, including employment, if applicable.

A single Contractor will be selected from amongst the responsive bids received in response to the RFP. The Work is to be performed for a total period of 43 months which includes: a four (4) month implementation period, thirty-six (36) month full service period; and a six (6) month contract close out period. There will also be an option to extend the period of the Contract by up to one (1) additional, 12 month period.

- 1.2.2 There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. For more information on personnel and organization security screening or security

clauses. Bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website".

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

1.2.4 The Federal Contractors Program (FCP) for employment equity applies to this procurement; refer to Part 5 – Certifications and Additional Information, Part 7 - Resulting Contract Clauses and the annex titled [Federal Contractors Program for Employment Equity - Certification](#).

1.3 Debriefings

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within 15 working days from receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone or in person.

1.4 Phased Bid Compliance Process

The Phased Bid Compliant Process applies to this procurement

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

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

The [2003](#) (2017/04/27) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 5.4 of [2003](#), Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days
Insert: 120 days

2.1.1 Joint Venture

The 2003 (2017/04/27) Standard Instructions – Goods or Services – Competitive Requirements, Section 17 (2010/01/11) Joint Venture is incorporated in full text below:

1. A joint venture is an association of two or more parties who combine their money, property, knowledge, expertise or other resources in a single joint business enterprise, sometimes referred as a consortium, to bid together on a requirement. Bidders who bid as a joint venture must indicate clearly that it is a joint venture and provide the following information:

- a. the name of each member of the joint venture;
 - b. the Procurement Business Number of each member of the joint venture;
 - c. the name of the representative of the joint venture, i.e. the member chosen by the other members to act on their behalf, if applicable;
 - d. the name of the joint venture, if applicable.
2. If the information is not clearly provided in the bid, the Bidder must provide the information on request from the Contracting Authority.
3. The bid and any resulting contract must be signed by all the members of the joint venture unless one member has been appointed to act on behalf of all members of the joint venture. The Contracting Authority may, at any time, require each member of the joint venture to confirm that the representative has been appointed with full authority to act as its representative for the purposes of the bid solicitation and any resulting contract. If a contract is awarded to a joint venture, all members of the joint venture will be jointly and severally or solidarily liable for the performance of any resulting contract.

2.2 Submission of Bids

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

Due to the nature of the bid solicitation, bids transmitted by facsimile to PWGSC will not be accepted.

2.3 Former Public Servant

Former Public Servant - Competitive Bid

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

Definitions

For the purposes of this clause,

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

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

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

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

Former Public Servant in Receipt of a Pension As per the above definitions, is the Bidder a FPS in receipt of a pension? **Yes () No ()**

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

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

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

Work Force Adjustment Directive

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **Yes () No ()**

If so, the Bidder must provide the following information:

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

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including Applicable Taxes.

2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than ten (10) calendar days before the bid closing date. Enquiries received after that time may not be answered.

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

2.5 Applicable Laws

Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in **Prince Edward Island**.

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

2.6 Improvement of Requirement During Solicitation Period

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reason for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority at least ten (10) days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

2.7 Basis for Canada's Ownership of Intellectual Property

Veterans Affairs Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, for the following reasons, as set out in the [Policy on Title to Intellectual Property Arising Under Crown Procurement Contracts](#): the main purpose of the contract, or of the deliverables contracted for, is to general knowledge and information for public dissemination.

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

Canada requests that Bidders provide their bid in separately bound sections as follows:

- Section I: Technical Bid - ten (10) hard copies.
- Section II: Financial Bid - two (2) hard copies
- Section III: Certifications - one (1) hard copy

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

Canada requests that Bidders follow the format instructions described below in the preparation of their bid:

- (a) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- (b) use a numbering system that corresponds to the bid solicitation.

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

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

Section I: Technical Bid

In their technical bid, Bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying out the work.

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

The technical bid must address all Mandatory Technical Evaluation Criteria as well as all Point-Rated Evaluation Criteria contain in Annex "C" of this RFP.

To facilitate bid preparation and bid evaluation Bidders should prepare and submit their technical bid using the following Table of Contents:

Technical Bid Part 1

Part 1, Section 1.1 – Signed Copy of the RFP

This Section should include a signed copy of page 1 of this RFP (which is deemed to include all amendments_ as per instructions detailed in Part 2 of this RFP.

Part 1, Section 1.2 – Bidder Contact

This Section should include the Name, Telephone Number and Email address of a single contact person that is authorized to represent the Bidder for this RFP.

Technical Bid Part 2

Part 2, Section 2.1 – Mandatory Technical Evaluation Criteria

This Part of the Bid should be prepared in response to the Mandatory Technical Evaluation Criteria contained in Annex C of this RFP.

Part 2, Section 2.2 – Point-Rated Evaluation Criteria

This Part of the Bid should be prepared in response to the Point-Rated Evaluation Criteria contained in Annex C of this RFP

Technical Bid Part 3

Part 3, Section 3.1 – Technical Bid Documentation

This Part of the Bid should list and include all documentation specified in the Submission requirements or otherwise referenced by the Bidder in its Technical Bid, if applicable.

Section II: Financial Bid

3.1.1 Bidders must submit their financial bid in accordance with the Basis of Payment in Annex B.

3.1.2 Electronic Payment of Invoices – Bid

If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Annex “E” Electronic Payment Instruments, to identify which ones are accepted.

If Annex “E” Electronic Payment Instruments is not completed, it will be considered as if Electronic Payment Instruments are not being accepted for payment of invoices.

Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

3.1.3 SACC Manual Clauses

Section III: Certifications

Bidders must submit the certifications and additional information required under Part 5.

Section IV: Additional Information

3.1.4 Bidder’s Proposed Sites or Premises Requiring Safeguarding Measures

3.1.4.1 As indicated in Part 6 under Security Requirements, the Bidder must provide the full addresses of the Bidder’s and proposed individuals’ sites or premises for which safeguarding measures are required for Work Performance:

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

- 3.1.4.2** The Company Security Officer must ensure through the Contract Security Program that the Bidder and proposed individuals hold a valid security clearance at the required level, as indicated in Part 6 – Security, Financial and Other Requirements.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.
- (c) Canada will use the Phased Bid Compliance Process described below.

4.1.1 Phased Bid Compliance Process

4.1.1.1 General

- a) Canada is conducting the Phased Bid Compliance Process described below for this requirement.

b) Notwithstanding any review by Canada at Phase I or II of the Phased Bid Compliance Process, Bidders are and will remain solely responsible for the accuracy, consistency and completeness of their Bids and Canada does not undertake, by reason of this review, any obligations or responsibility for identifying any or all errors or omissions in Bids or in responses by a Bidder to any communication from Canada.

THE BIDDER ACKNOWLEDGES THAT THE REVIEWS IN PHASE I AND II OF THIS PHASED BID COMPLIANCE PROCESS ARE PRELIMINARY AND DO NOT PRECLUDE A FINDING IN PHASE III THAT THE BID IS NON-RESPONSIVE, EVEN FOR MANDATORY REQUIREMENTS WHICH WERE SUBJECT TO REVIEW IN PHASE I OR II AND NOTWITHSTANDING THAT THE BID HAD BEEN FOUND RESPONSIVE IN SUCH EARLIER PHASE. CANADA MAY DEEM A BID TO BE NON-RESPONSIVE TO A MANDATORY REQUIREMENT AT ANY PHASE. THE BIDDER ALSO ACKNOWLEDGES THAT ITS RESPONSE TO A NOTICE OR A COMPLIANCE ASSESSMENT REPORT (CAR) (EACH DEFINED BELOW) IN PHASE I OR II MAY NOT BE SUCCESSFUL IN RENDERING ITS BID RESPONSIVE TO THE MANDATORY REQUIREMENTS THAT ARE THE SUBJECT OF THE NOTICE OR CAR, AND MAY RENDER ITS BID NON-RESPONSIVE TO OTHER MANDATORY REQUIREMENTS.

- c) Without prejudice to its other rights, Canada shall have the right, in its absolute discretion, but shall not be obliged, to request and accept any time, before or after the solicitation closing date, and consider as part of the Bid, any document and materials from Bidders to clarify the Bid or to correct deficiencies or errors in the Bid that are not significant in Canada's absolute discretion, including all matters of form or error in computation or failure to confirm by signing or similarly verifying acceptance. This shall not limit

Canada's right to request or accept any information after the bid solicitation closing in circumstances where the bid solicitation expressly provides for this right.

d) The PBCP does not limit Canada's rights under Standard Acquisition Clauses and Conditions (SACC) 2003 (2017-04-27) Standard Instructions – Goods or Services – Competitive Requirements nor Canada's right to request or accept any information during the solicitation period or after bid solicitation closing in circumstances where the bid solicitation expressly provides for this right, or in the circumstances described in subsection (c).

e) Canada will send any Notice or CAR by any method Canada chooses, in its absolute discretion. The Bidder must submit its response by the method stipulated in the Notice or CAR. Responses are deemed to be received by Canada at the date and time they are delivered to Canada by the method and at the address specified in the Notice or CAR. An email response permitted by the Notice or CAR is deemed received by Canada on the date and time it is received in Canada's email inbox at Canada's email address specified in the Notice or CAR. A Notice or CAR sent by Canada to the Bidder at any address provided by the Bidder in or pursuant to the Bid is deemed received by the Bidder on the date it is sent by Canada. Canada is not responsible for late receipt by Canada of a response, however caused.

4.1.1.2 Phase I: Financial Bid

a) After the closing date and time of this bid solicitation, Canada will examine the Bid to determine whether it includes a Financial Bid and whether any Financial Bid includes all information required by the solicitation. Canada's review in Phase I will be limited to identifying whether any information that is required under the bid solicitation to be included in the Financial Bid is missing from the Financial Bid. This review will not assess whether the Financial Bid meets any standard or is responsive to all solicitation requirements.

b) Canada's review in Phase I will be performed by officials of the Department of Public Works and Government Services.

c) If Canada determines, in its absolute discretion that there is no Financial Bid or that the Financial Bid is missing all of the information required by the bid solicitation to be included in the Financial Bid, then the Bid will be considered non-responsive and will be given no further consideration.

d) For Bids other than those described in c), Canada will send a written notice to the Bidder ("Notice") identifying where the Financial Bid is missing information. A Bidder, whose Financial Bid has been found responsive to the requirements that are reviewed at Phase I, will not receive a Notice. Such Bidders shall not be entitled to submit any additional information in respect of their Financial Bid.

e) The Bidders who have been sent a Notice shall have the time period specified in the Notice (the "Remedy Period") to remedy the matters identified in the Notice by providing to Canada, in writing, additional information or clarification in response to the Notice. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the Notice.

f) In its response to the Notice, the Bidder will be entitled to remedy only that part of its Financial Bid which is identified in the Notice. For instance, where the Notice states that a required line item has been left blank, only the missing information may be added to the Financial Bid, except that, in those instances where the addition of such information will necessarily result in a change to other calculations previously submitted in its Financial Bid, (for example, the calculation to determine a total price), such necessary

adjustments shall be identified by the Bidder and only these adjustments shall be made. All submitted information must comply with the requirements of this solicitation.

g) Any other changes to the Financial Bid submitted by the Bidder will be considered to be new information and will be disregarded. There will be no change permitted to any other Section of the Bidder's Bid. Information submitted in accordance with the requirements of this solicitation in response to the Notice will replace, in full, **only** that part of the original Financial Bid as is permitted above, and will be used for the remainder of the bid evaluation process.

h) Canada will determine whether the Financial Bid is responsive to the requirements reviewed at Phase I, considering such additional information or clarification as may have been provided by the Bidder in accordance with this Section. If the Financial Bid is not found responsive for the requirements reviewed at Phase I to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.

i) Only Bids found responsive to the requirements reviewed in Phase I to the satisfaction of Canada, will receive a Phase II review.

4.1.1.3 Phase II: Technical Bid

a) Canada's review at Phase II will be limited to a review of the Technical Bid to identify any instances where the Bidder has failed to meet any Eligible Mandatory Criterion. This review will not assess whether the Technical Bid meets any standard or is responsive to all solicitation requirements. Eligible Mandatory Criteria are all mandatory technical criteria that are identified in this solicitation as being subject to the Phased Bid Compliance Process. Mandatory technical criteria that are not identified in the solicitation as being subject to the Phased Bid Compliance Process, will not be evaluated until Phase III.

b) Canada will send a written notice to the Bidder (Compliance Assessment Report or "CAR") identifying any Eligible Mandatory Criteria that the Bid has failed to meet. A Bidder whose Bid has been found responsive to the requirements that are reviewed at Phase II will receive a CAR that states that its Bid has been found responsive to the requirements reviewed at Phase II. Such Bidder shall not be entitled to submit any response to the CAR.

c) A Bidder shall have the period specified in the CAR (the "Remedy Period") to remedy the failure to meet any Eligible Mandatory Criterion identified in the CAR by providing to Canada in writing additional or different information or clarification in response to the CAR. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the CAR.

d) The Bidder's response must address only the Eligible Mandatory Criteria listed in the CAR as not having been achieved, and must include only such information as is necessary to achieve such compliance. Any additional information provided by the Bidder which is not necessary to achieve such compliance will not be considered by Canada, except that, in those instances where such a response to the Eligible Mandatory Criteria specified in the CAR will necessarily result in a consequential change to other parts of the Bid, the Bidder shall identify such additional changes, provided that its response must not include any change to the Financial Bid.

e) The Bidder's response to the CAR should identify in each case the Eligible Mandatory Criterion in the CAR to which it is responding, including identifying in the corresponding section of the original Bid, the wording of the proposed change to that section, and the wording and location in the Bid of any other consequential changes that necessarily result from such change. In respect of any such consequential

change, the Bidder must include a rationale explaining why such consequential change is a necessary result of the change proposed to meet the Eligible Mandatory Criterion. It is not up to Canada to revise the Bidder's Bid, and failure of the Bidder to do so in accordance with this subparagraph is at the Bidder's own risk. All submitted information must comply with the requirements of this solicitation.

f) Any changes to the Bid submitted by the Bidder other than as permitted in this solicitation, will be considered to be new information and will be disregarded. Information submitted in accordance with the requirements of this solicitation in response to the CAR will replace, in full, **only** that part of the original Bid as is permitted in this Section.

g) Additional or different information submitted during Phase II permitted by this section will be considered as included in the Bid, but will be considered by Canada in the evaluation of the Bid at Phase II only for the purpose of determining whether the Bid meets the Eligible Mandatory Criteria. It will not be used at any Phase of the evaluation to increase or decrease any score that the original Bid would achieve without the benefit of such additional or different information. For instance, an Eligible Mandatory Criterion that requires a mandatory minimum number of points to achieve compliance will be assessed at Phase II to determine whether such mandatory minimum score would be achieved with such additional or different information submitted by the Bidder in response to the CAR. If so, the Bid will be considered responsive in respect of such Eligible Mandatory Criterion, and the additional or different information submitted by the Bidder shall bind the Bidder as part of its Bid, but the Bidder's original score, which was less than the mandatory minimum for such Eligible Mandatory Criterion, will not change, and it will be that original score that is used to calculate any score for the Bid.

h) Canada will determine whether the Bid is responsive for the requirements reviewed at Phase II, considering such additional or different information or clarification as may have been provided by the Bidder in accordance with this Section. If the Bid is not found responsive for the requirements reviewed at Phase II to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.

i) Only Bids found responsive to the requirements reviewed in Phase II to the satisfaction of Canada, will receive a Phase III evaluation.

4.1.1.4 Phase III: Final Evaluation of the Bid

a) In Phase III, Canada will complete the evaluation of all Bids found responsive to the requirements reviewed at Phase II. Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.

b) A Bid is non-responsive and will receive no further consideration if it does not meet all mandatory evaluation criteria of the solicitation.

4.1.2 Technical Evaluation

Mandatory and point rated technical evaluation criteria are included in Annex C. ***The Phased Bid Compliance Process will apply to all mandatory technical criteria.***

4.1.2 Financial Evaluation

See Basis of Selection Below

4.2 Basis of Selection

4.2.1 Mandatory Technical Criteria

Basis of Selection - Highest Combined Rating of Technical Merit and Price

1. To be declared responsive, a bid must:

- (a) comply with all the requirements of the bid solicitation; and
- (b) meet all mandatory criteria; and
- (c) obtain the required minimum points specified for each criterion for the technical evaluation, and
- (d) obtain the required minimum of 1,470 points overall for the technical evaluation criteria which are subject to point rating.

The rating is performed on a scale of 21,000 points.

- 2. Bids not meeting (a) or (b) or (c) and (d) will be declared non-responsive.
- 3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70 % for the technical merit and 30% for the price.
- 4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%.
- 5. To establish the pricing score, the firm prices/rates provided by the bidder in Annex B Basis of Payment will be used by the Evaluation Team to calculate an evaluated cost/total bid price. Each responsive bid's evaluated cost/total bid price will be prorated against the lowest evaluated price and the ratio of 30%.
- 6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
- 7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 60/40 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$45,000 (45).

Basis of Selection - Highest Combined Rating Technical Merit (60%) and Price (40%)

	<i>Bidder</i>		
	<i>Bidder 1</i>	<i>Bidder 2</i>	<i>Bidder 3</i>
Overall Technical Score	115/135	89/135	92/135
Bid Evaluated Price	\$55,000.00	\$50,000.00	\$45,000.00
Calculations			
Technical Merit Score	115/135 x 60 = 51.11	89/135 x 60 = 39.56	92/135 x 60 = 40.89
Pricing Score	45/55 x 40 = 32.73	45/50 x 40 = 36.00	45/45 x 40 = 40.00
Combined Rating	83.84	75.56	80.89
Overall Rating	1st	3rd	2nd

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

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

5.1 Certifications Required with the Bid

Bidders must submit the following duly completed certifications as part of their bid.

5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all bidders must provide with their bid, **if applicable**, the Integrity declaration form available of the [Forms for the Integrity Regime](http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html) website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process

5.2 Certifications Precedent to Contract Award and Additional Information

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

5.2.1 Integrity Provisions – Required Documentation

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

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#) website (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#>).

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

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

The Bidder must provide the Contracting Authority with a completed annex titled Federal Contractors Program for Employment Equity - Certification, before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

5.2.3 Additional Certifications Precedent to Contract Award

5.2.3.1 Canadian Content Certification

5.2.3.1.1 SACC Manual clause [A3050T](#) (2014/11/27) Canadian Content Definition.

This procurement is limited to Canadian services.

The Bidder certifies that:

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

5.2.3.2 Status and Availability of Resources

SACC Reference	Section	Date
<u>A3005T</u>	Status and Availability of Resources	2010/08/16

5.2.3.3 Education and Experience

SACC Reference	Section	Date
<u>A3010T</u>	Education and Experience	2010/08/16

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirements

- Before award of a contract, the following conditions must be met:
 - the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
 - the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses;
 - the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
 - the Bidder's proposed location of work performance and document safeguarding must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses;
 - the Bidder must provide the addresses of proposed sites or premises of work performance and document safeguarding as indicated in Part 3 - Section IV Additional Information.
- Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful Bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.
- For additional information on security requirements, Bidders should refer to the Contract Security Program of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

6.2 Financial Capability

SACC Manual clause A9033T (2012/07/16) Financial Capability

6.3 Insurance Requirements

Insurance – Proof of Availability Prior to Contract Award

The Bidder must provide a letter from an insurance broker or an insurance company licensed to operate in Canada stating that the Bidder, if awarded a contract as a result of the bid solicitation, can be insured in accordance with the Insurance Requirements specified in Part 7 – Resulting Contract Clauses.

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

PART 7 - RESULTING CONTRACT CLAUSES

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

7.1 Statement of Work

7.1 Statement of Work - Contract

The Contractor must perform the Work in accordance with the Statement of Work at Annex "A" and the Contractor's technical bid entitled _____, dated _____.

7.2 Standard Clauses and Conditions

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

7.2.1 General Conditions

[2035](#) (2016/04/04), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

7.2.2 Supplemental General Conditions

[4007](#) (2010/08/16) Canada to Own Intellectual Property Rights in Foreground Information

[4008](#) (2008/12/12) Personal Information

apply to and form part of the Contract.

7.3 Security Requirements

7.3.1 The following security requirements (SRCL and related clauses provided by the Contract Security Program) apply and form part of the Contract.

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

7.3.2 Contractor's Sites or Premises Requiring Safeguarding Measures

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

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

- 7.3.2.2** The Company Security Officer must ensure through the Contract Security Program that the Contractor and individuals hold a valid security clearance at the required level.

7.4 Term of Contract

7.4.1 Period of the Contract

The Work is to be performed for a total period of forty-three (43) months from Contract which includes:

- A four (4) month implementation period;
- A thirty-six (36) month full service period;
- A three (3) month contract phase out period;

Client referrals will cease at the end of the thirty-six (36) month full service period.

7.4.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to one (1) additional one (1) year period(s) under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

Canada may exercise this option at any time by sending a written notice to the Contractor at least sixty (60) calendar days prior to the expiry of the thirty-six (36) month full service period of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

7.5 Authorities

7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Janine Donovan
Title: Supply Specialist
Public Services and Procurement Canada
Acquisitions Branch
Address: 189 Prince William St., 4th Floor, Room 405
Saint John, New Brunswick
E2L 2B9
Telephone: (506) 636-5347
Facsimile: (506) 636-4376
E-mail address: janine@pwgsc-tpsgc.gc.ca

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

7.5.2 VAC Contract Administration Authority

The VAC Contract Administration Authority is: **Will be identified at time of award.**

Name: _____
Title: _____
Organization: _____
Address: _____
Telephone: ____-____-_____
Facsimile: ____-____-_____
E-mail address: _____

The VAC Contract Administration Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the

technical content of the Work under the Contract. Technical matters may be discussed with the VAC Contract Administration Authority; however, the VAC Contract Administration Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

7.5.3 Project Authority

The Project Authority for the Contract is: **Will be identified at time of award.**

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

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

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

7.5.4 Contractor's Representative (bidder please complete)

Name: _____
Title: _____
Organization: _____
Address: _____
Telephone: _____
Facsimile: _____
E-mail address: _____

7.6 Proactive Disclosure of Contracts with Former Public Servants

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

7.7 Payment

7.7.1 Basis of Payment

Basis of Payment – Limitation of Expenditure

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work, as determined in accordance with the Basis of Payment in Annex B, to a limitation of expenditure of \$_____ (insert the amount at contract award). Customs duties are included and Applicable Taxes are extra.

7.7.1.1 Travel and Living Expenses – National Joint Council Travel Directive

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

All travel must have the prior authorization of the VAC Contract Administration Authority.

All payments are subject to government audit.

7.7.2 Limitation of Expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed \$ _____. Customs duties are included and Applicable Taxes are extra.
2. No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - a. when it is 75 percent committed, or
 - b. four (4) months before the contract expiry date, or
 - c. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work, whichever comes first.
3. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

7.7.3 Method of Payment

SACC Reference	Section	Date
<u>H1008C</u>	Monthly Payment	2008/05/12

7.7.4 SACC Manual Clauses

SACC Reference	Section	Date
<u>A9117C</u>	T1204 - Direct Request by Customer Department	2007/11/30

7.7.5 Electronic Payment of Invoices – Contract

The Contractor accepts to be paid using any of the following Electronic Payment Instrument(s):

1. Visa Acquisition Card;
2. MasterCard Acquisition Card;
3. Direct Deposit (Domestic and International);
4. Electronic Data Interchange (EDI);
5. Wire Transfer (International Only);
6. Large Value Transfer System (LVTS) (Over \$25M)

7.7.6 Discretionary Audit

SACC Reference	Section	Date
<u>C0705C</u>	Discretionary Audit	2010/01/11

7.7.7 Time Verification

SACC Reference	Section	Date
<u>C0711C</u>	Time Verification	2008/05/12

7.8 Invoicing Instructions

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

Each invoice must be supported by:

- (a) a copy of time sheets to support the time claimed;
- (b) a copy of the release document and any other documents as specified in the Contract;
- (c) a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
- (d) a copy of the monthly progress report.

2. Invoices must be distributed as follows:

- (a) The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.
- (b) One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

7.9 Certifications and Additional Information

7.9.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

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

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

7.9.3 SACC Manual Clauses

SACC Reference	Section	Date
A3060C	Canadian Content Certification	2008/05/12

7.10 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in **Prince Edward Island**.

7.11 Priority of Documents

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

- (a) the Articles of Agreement;
- (b) the supplemental general conditions;
[4007](#) (2010/08/16), Canada to Own Intellectual Property Rights in Foreground Information
[4008](#) (2008/12/12), Personal Information

- (c) [2035](#) (2016/04/04), General Conditions - Higher Complexity - Services;
- (d) Annex A, Statement of Work
- (e) Annex B, Basis of Payment;
- (f) Annex D, Security Requirements Check List;
- (g) the Contractor's bid dated _____,

7.12 Foreign Nationals (Canadian Contractor)

SACC Manual clause [A2000C](#) (2006/06/16) Foreign Nationals (Canadian Contractor)

7.13 Insurance Requirements

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

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

The Contractor must forward to the Contracting Authority within ten (10) days after the date of award of the Contract, a Certificate of Insurance evidencing the insurance coverage and confirming that the insurance policy complying with the requirements is in force. For Canadian-based Contractors, coverage must be placed with an Insurer licensed to carry out business in Canada, however, for Foreign-based Contractors, coverage must be placed with an Insurer with an A.M. Best Rating no less than "A-". The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

7.13.1 Commercial General Liability Insurance

1. The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
2. The Commercial General Liability policy must include the following:
 - (a) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
 - (b) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
 - (c) Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
 - (d) Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.

- (e) Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
- (f) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
- (g) Employees and, if applicable, Volunteers must be included as Additional Insured.
- (h) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
- (i) Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
- (j) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
- (k) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
- (l) Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.
- (m) Non-Owned Automobile Liability - Coverage for suits against the Contractor resulting from the use of hired or non-owned vehicles.
- (n) All Risks Tenants Legal Liability - to protect the Contractor for liabilities arising out of its occupancy of leased premises.
- (o) Litigation Rights: Pursuant to subsection 5(d) of the Department of Justice Act, S.C. 1993, c. J-2, s.1, if a suit is instituted for or against Canada which the Insurer would, but for this clause, have the right to pursue or defend on behalf of Canada as an Additional Named Insured under the insurance policy, the Insurer must promptly contact the Attorney General of Canada to agree on the legal strategies by sending a letter, by registered mail or by courier, with an acknowledgement of receipt.

For the province of Quebec, send to:

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

For other provinces and territories, send to:

Senior General Counsel,

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

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

7.13.2 Errors and Omissions Liability Insurance

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

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

Solicitation No. - N° de l'invitation
51019-176003/A
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ANNEX "A"

STATEMENT OF WORK

Statement of Work

Career Transition Services and Veterans' Education and Training Benefit

Veterans Affairs Canada

August 16, 2017

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STATEMENT OF WORK

1.0 GENERAL INFORMATION

1.1 Introduction

Veterans Affairs Canada (VAC) exists to repay the nation's debt of gratitude to Veterans and their families, and to recognize the contributions they have made to our growth as a nation. The Minister of Veterans Affairs is responsible for “the care, treatment or re-establishment in civil life” of Veterans, as well as the care of their dependents or survivors.

The Speech from the Throne, on December 4, 2015, highlighted the Government of Canada's commitment to grow Canada's middle class and support Canada's Veterans and their families. Growth and strengthening of the middle class is integral to all Canadians, including Veterans and their families, by allowing them to have a real chance and a fair chance to succeed. The commitment speaks to creating more opportunities, especially for younger Canadians, to access post-secondary education. This commitment also speaks of public investment to create and support job creation.

In the delivery of services to Veterans and their families, VAC, and any Contractors working on behalf of VAC, must always keep care, compassion and respect in the forefront.

VAC is mandated to deliver Career Transition Services (CTS) to eligible Canadian Armed Forces (CAF) members, Veterans, spouses/common-law partners and survivors. VAC seeks a Contract for the delivery of this program on behalf of VAC, thereby assisting these client groups to successfully plan for, prepare for and obtain suitable civilian employment upon leaving the military and for the rest of their working life. These services must be delivered via the best possible tools and mechanisms to ensure that the needs of the clients are met, regardless of location in Canada, and that services take into consideration varying labour market challenges and regional differences.

VAC is also mandated to deliver the Veterans' Education and Training Benefit (ETB) to eligible Veterans to help them achieve their education and post-military transition goals, including employment, if applicable.

This Statement of Work (SOW) describes the CTS Program and ETB requirements that the Contractor must deliver.

1.2 Career Transition Services Program (CTS)

1.2.1 Program Description

The CTS program aims to provide CAF members services such as access to basic on-line instruction modules and labour market information (e.g., to understand how to find/explore/understand labour market information in a specific region of Canada) to be able to make an evidence-informed decision about whether or not to pursue release or be retained in the CAF. The Program also provides early engagement and needs-based access to employment services for CAF members who have decided to release, to improve the likelihood that they are informed and that they have the knowledge, tools and abilities to transition smoothly to the civilian workforce. CAF Veterans may also access the CTS program post-release, as required, to address ongoing support in career transition. Employment services aimed at advancing the careers of eligible spouses/common-law partners and survivors, whose

career opportunities may have been impacted by their partner's military life, are also available under this program.

1.2.2 Although primarily focused on supporting the client to plan for, prepare for and obtain suitable civilian employment, the CTS program includes other aspects particular to the CAF, including, but not limited to, advice on the transition to civilian employment and civilian career management. Challenges associated with providing consistent services include:

- geographically diverse locations within Canada;
- working lifetime of most eligible clients;
- various backgrounds and skills; and,
- military ethos instilled in serving members during what is, in many cases, a long period of service.

1.2.3 The CTS Plan must be managed and co-ordinated to provide a coherent and integrated "program" of appropriate support to each eligible client, taking full account of individual needs, availability and the level of service available to that client type. Individualized career transition plans developed for eligible clients by the Contractor must include the coordination of programs/services available from a number of existing employment programs/services as well as direct client service delivery, if needed, and must take into consideration geographical or regional considerations that may pose additional challenges for the client.

1.3 Program Objectives

Successful transition from military to civilian life is subjective to each individual and may be impacted by various factors, one of which is employment status. The Contractor's performance will not be measured against the following objectives but the overall activities conducted by the Contractor with respect to career transition services must be consistent with industry best practices and support VAC's intended objectives.

The objectives of the CTS program are to:

- provide early engagement and access to employment services for CAF members, commencing pre-release, so that they are informed and have the knowledge, tools, and abilities to smoothly transition to the civilian labour force;
- provide career transition planning, including the identification of needed education/training programs;
- support Veterans who require assistance in securing employment through job finding assistance, which includes job placement, where applicable;
- support Veterans' engagement in purposeful activity;
- advance the career of eligible spouses/common-law partners and survivors; and,
- enhance the well-being of Veterans and their families.

1.3.1 Expected Client Outcomes:

VAC has established outcomes and related performance indicators that the Department will track and report against over time.

The Contractor must collect this data as part of the delivery of the program and will be required to produce related reports. The outcomes, performance indicators and related targets include:

Outcomes	Performance Indicators	Targets
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Eligible clients increase their civilian and/or career skills	% of eligible clients with a CTS Plan, who have achieved one or more goals of the CTS Plan.	80%
Eligible clients have a sense of purpose	% of eligible clients who are satisfied with their job or main activity	80% of program clients are satisfied with their job or main activity;
	Improved employment rate for program clients	75% of program clients are participating in the civilian labour force.
Veterans, who participate in CTS, are able to adapt, manage and cope with civilian life	% of Veterans who participate in CTS who report a successful transition to the civilian workforce	80%

1.4 Eligible Client Groups and Duration of CTS Program

CAF members, Veterans, spouses/common-law partners and survivors can all be eligible program clients as long as certain eligibility criteria are met. The duration of their program eligibility will vary depending on their eligibility type.

Table 1: CTS Program Eligible Clients and Duration of CTS Program Eligibility

Eligible Client Groups		Duration of CTS Program Eligibility
CAF members who:	- have completed basic training (Basic Military Qualification or Basic Officer Qualification).	Eligible to participate in career transition services throughout their CAF service.
CAF Veterans who:	- have completed basic training (Basic Military Qualification or Basic Officer Qualification), and - were released from the CAF on or after 01 April 2006.	Eligible for career transition services throughout their adult working life ¹ .
CAF Veterans who:	- are entitled to the VAC Canadian Forces Income Support (CFIS) benefit.	While entitled to VAC CFIS benefit.
Survivors of CAF Veterans who:	- are entitled to a VAC CFIS benefit.	
Spouses/common-law partners of CAF Veterans who:	- have completed basic training (Basic Military Qualification or Basic Officer Qualification), and - were released from the CAF on or after 01 April 2006.	The later of: (a) March 31, 2020, and (b) The second anniversary of the day on which the

¹ There is no specific definition of "adult working life". The interpretation is case specific. For example, should a Veteran at age 71 wish to work, the Veteran is eligible for career transition services, as needed.

		Veteran was released.
Survivors of CAF members who:	<ul style="list-style-type: none"> - completed basic training (Basic Military Qualification or Basic Officer Qualification), and - died on or after 01 April 2006. 	Throughout their adult working life.
Survivors of CAF Veterans who :	<ul style="list-style-type: none"> - completed basic training (Basic Military Qualification or Basic Officer Qualification), and - were released from the CAF on or after 01 April 2006. 	Throughout their adult working life.

1.4.1 The CTS program may be provided to those eligible client groups only if the Veteran, spouse/common-law partner or survivor is a resident of Canada. For the purposes of the CTS program, a Veteran, spouse/common-law partner or survivor may be absent from Canada for a total of 183 days or less in a calendar year and still be considered a Canadian resident. Serving members of the CAF must also meet the Canadian residency requirement. For this group, all absences from Canada (while stationed overseas, for example) are deemed not to have interrupted residence in Canada.

1.5 Veterans' Education and Training Benefit (ETB)

1.5.1 Benefit Description

For those Veterans eligible for VAC's ETB, the Contractor must assist the Veteran to make an informed choice/selection of an education or training program relevant to the Veteran's civilian career objectives. The Contractor is required to prepare, in consultation with the Veteran, an ETB Plan that meets VAC's requirements.

The ETB will provide funding to support the costs of college, university or technical education. Veterans with six years of service may be eligible for up to \$40,000 and Veterans with at least 12 years of service may be eligible for up to \$80,000 to cover tuition, course materials, and some incidentals and living expenses. The ETB is designed to allow for Veterans to participate in their educational program on a part-time basis, if necessary.

Veterans will not be limited to post-secondary training. If university or college is not their choice, a portion of the total funding would be available for career and personal development courses. This could include, but are not limited to small business boot camps and/or continuing education.

CTS and the ETB will complement each other and better support Veterans during their transition to post-military life.

1.6 Program Objectives

Successful transition from military to civilian life is subjective to each individual and may be impacted by various factors, including satisfaction with their main activity or employment post-release. The Contractor's performance will not be measured against the following objectives but the overall activities conducted by the Contractor in relation to ETB must be consistent with industry best practices for education planning and counselling and support VAC's intended objectives.

The objectives of the ETB program are to:

- support Veterans in achieving their education and future post-military employment goals;
- help position Veterans to be more competitive in the workforce if employment is their goal;
- support Veterans' engagement in purposeful activity; and
- enhance the well-being of Veterans and their families.

1.6.1 Expected Client Outcomes:

VAC has established outcomes and related performance indicators that the Department will track and report against over time.

The Contractor must collect this data as part of the delivery of the program and will be required to produce related reports. The outcomes, performance indicators and related targets include:

Outcomes	Performance Indicators	Targets
Veterans increase their knowledge and skills	% of Veterans who successfully complete their first year of study within their chosen program	80%
Veterans have a sense of purpose	% of program clients who are satisfied with their job or main activity	80% of program clients are satisfied with their job or main activity
	Improved employment rate for program clients	75% of program clients are participating in the civilian labour force.

1.6.2 Eligible Client Groups and Duration of ETB

ETB is available to Veterans as long as certain eligibility criteria are met. The duration of their program eligibility will vary depending on their goals outlined in their plan.

Eligibility Criteria: Veterans who have been honourably released from the CAF and have served for a total of at least six years. A Veteran must be released from the CAF to use the education benefits.

Veterans will have 10 years from their release date to use the benefits.

VAC determines the eligibility and the amount of ETB payable and will distribute payments directly to the client.

1.7 Career Transition Services Available by Client Type

The career transition services that will be available to an individual client depends on client type. Any individual who is eligible for ETB is also eligible to receive career transition services if they are a resident of Canada.

1.7.1

Table 2 outlines the services available by client type. There may be existing resources available or related to some of the services listed below. The Contractor must use existing resources where available. For example, for the one-on-one counselling element, Military to civilian –

transferable skills analysis, there are existing resources that should be used rather than the Contractor developing their own.

Table 2: Services Available by Client Type

Service	Serving CAF Members	Releasing CAF Members and Spouses / Common-Law Partners	Veterans and Survivors (including CFIS recipients)
INTAKE ASSESSMENT/RE-ASSESSMENT	√	√	√
<u>Planning</u>			
- Develop an individualized Career Transition Services Plan with a focus on career exploration – Update and record progress as required, including post-employment transition support and plan closure	√	-	-
- Develop an individualized Career Transition Plan with a focus on career transition into a civilian career – Update and record progress as required, including post-employment transition support and plan closure	-	√	√
- Develop an individualized Educational Plan – Update and record progress as required, including post-employment transition support and plan closure	-	√	√
NOTE: For those eligible for both CTS and ETB, the ETB Plan is included in the CTS Plan.			
<u>Educational Counselling:</u> Providing counselling regarding educational requirements to achieve client identified career goals.		√	√
<u>Labour Market Information Services</u> Provide information to clients on:			
- Labour market trends on a national, regional, provincial and sector basis.	√	√	√
- Availability of employment, on a national, regional, provincial and sector basis.			
- Skills employers are looking for; which industries are hiring and where they are located.			

<ul style="list-style-type: none"> - Where to find employers who are hiring; what the working conditions are like for specific industries; what education and training is needed for specific jobs. - What factors can prevent obtaining employment; which jobs are growing in the future and other related statistics. 			
<u>On-line Resources and Instruction:</u> Develop and/or deliver on-line, self-directed modules relating to: <ul style="list-style-type: none"> - Self-assessment of education, skills and experience - Interest inventory - Résumé and cover letter for a specific job - Military to civilian employment transition - Job search techniques - Interview skills and techniques - Self-marketing - Accessing job banks (leveraging existing and new sources) - How to access labour market information 	√	√	√
<u>One-on-One Career Counselling:</u> Provide individualized interactive career counselling and coaching via telephone, on-line communication tools and/or face to face via webcam (videotelephony) relating to: <ul style="list-style-type: none"> • Military to civilian – transferable skills • Self-assessment of education, skills and experience • Aptitude testing • Interest inventory • Résumé and cover letter preparation and updating • Tailoring résumé and cover letter for a specific job • Military to civilian employment transition • Job search techniques • Interview skills and techniques • Self-marketing 	-	√	√
<u>Referrals to other organizations:</u> Refer clients to resources including, but not limited to: <ul style="list-style-type: none"> • Provincial/Territorial resources and opportunities • Military Employment Transition (MET) or MET Spouse program 	-	√	√
<u>Job Finding Assistance (including Job Placement)</u> (telephone, on-line communication tools and/or face to face via webcam (videotelephony))	-	-	√

<ul style="list-style-type: none"> • Assess and resolve, through tips and techniques or referrals to community sources, employment barriers that may exist in obtaining and/or retaining employment in civilian workforce. • Provide assistance in locating specific job opportunities suited to the client's skills and experience. • Provide individual support in job application process including assistance with preparation of cover letter, participating in mock interviews, support in organizing, recording and maintaining job search logs. • Facilitate client access to existing networks of potential employer contacts, both by industry sector and province, to which clients with appropriate skills and knowledge may be further supported to find suitable employment. • Provide job placement assistance to navigate to specific jobs and employers when applicable. 			
<u>Pre-Plan Closure/Employment Transition Support</u> <ul style="list-style-type: none"> • Follow up within a three month period prior to closure of a plan which may include during the initial stages of employment • Minimum 1x and maximum 2x follow-up to ensure needs have been met 			√

1.7.2 The Contractor will have the authority to provide services, as outlined above, during the period of time for which the client is eligible for the CTS program or the ETB, as per the maximums listed in section 2.13.

1.7.3 Eligibility may change over time. For example, should a Veteran access VAC's Rehabilitation Services and Vocational Assistance Program, the Veteran will no longer be eligible for CTS/ETB. The Contractor will be notified electronically by VAC by the communication of a termination date of the client's eligibility for CTS/ETB. The Contractor is responsible to communicate this service termination information within their organization and cease service provision. VAC will notify clients of the change in eligibility. Should participation in VAC's Rehabilitation Services and Vocational Assistance Program end, the client will become eligible for CTS/ETB again.

1.7.4 The services that some clients are eligible for may also change over time. For example, should a member release from the CAF, services would expand from the provision of labour market information and on-line resources and instruction to include career counselling and education planning. The Contractor is responsible to obtain and store the supporting

information from the client (e.g., confirmation/attestation intent to release or release) and communicate, to appropriate staff within their organization, the change in services that may be provided. The Contractor will notify VAC electronically when there are any changes to client type and/or the client's CTS/ETB Plan. Details of what information will be required from the Veteran to move between client types will be finalized during implementation.

1.7.5 Although eligibility for some clients will last a lifetime, the client is only considered active in career transition services during the period of time between referral/self-referral and closure as referred in section 2.

1.7.6 It is not VAC's intention to duplicate existing programs and services. Community-based programs/services and/or other government resources will be included in a client's Career Transition Plan.

1.8 VAC's Service Delivery Model

VAC commits to services that are easy to access, fair, respectful and responsive to client need. Clients can expect accurate and timely information which is easy to understand. With past and future advances in technology, VAC expects the Contractor to offer multi-channel and multi-media methods to interact with clients and continue to make advances and continuously improve all services. CTS/ETB must offer a multi-channel approach to delivering the services identified in Table 2 in order to meet client needs. A variety of mediums will be used to have an interactive presence, including but not limited to, toll-free access (telephone), secure messaging, on-line access (web portal) to reference materials and self-guided modules, on-line communication tools and face to face counselling via webcam (videotelephony).

1.9 Roles and Responsibilities

1.9.1 Contractor Responsibilities

The Contractor must:

1. Provide the full scope of approved services as described in this SOW.
2. Ensure that services are provided consistently across all 10 provinces and territories and to those members serving overseas, in accordance with the requirements described in this Statement of Work.
3. Ensure that services provided to clients take into consideration, and prepare the client for, the employment and labour market challenges and regional differences that may impact the client's success in transitioning to a civilian job.
4. Obtain and store the information needed from the client to support any change to the services for which the client is eligible, e.g., confirmation/attestation of release from the CAF.
5. Establish a network of Certified Career Counsellors and ensure that all employees/personnel working with VAC clients meet the Human Resource requirements and are security cleared as described in the Human Resources section of this SOW.
6. Provide career transition services that meet the performance standards as described in this SOW.
7. Adhere to established turn-around times as identified in this SOW.
8. Ensure the provision of services is consistent with requirements as outlined in this SOW.
9. Capture client data during the provision of services as outlined in section 2. Refer to Annex B for data capture requirements.
10. Provide performance and management reports on the performance of responsibilities and tasks as described in this SOW.

11. Respond to queries on reports, alert VAC Program Management of trends, anomalies or variances in reports and clarify data upon request.
12. Maintain privacy and client confidentiality in accordance with this SOW.
13. Keep current with industry standards and best practices for career transition services.
14. Recognize and leverage, where possible, networking opportunities and access to tools that may be of benefit to VAC's clients.
15. Notify VAC if there is an issue of health and safety affecting the client. VAC must be notified in accordance with procedures to be finalized during implementation.
16. Gather, analyse and report on feedback from clients in relation to services provided (e.g., counselling sessions, on-line modules). Where VAC has identified client satisfaction concerns, the Contractor will be notified and must submit an action plan to VAC for approval listing any corrective measures it proposes to take in order to remedy the identified client satisfaction issue prior to implementing any such corrective measures. The action plan must be submitted by the Contractor to VAC within five business days of the written notification.
17. Understand that utilization and take-up of the services provided is entirely voluntary on the part of eligible clients and they will be expected to play a pro-active role in encouraging those eligible to access the services available.
18. Adhere to the Issue Resolution process (to be developed by the Contractor in conjunction with VAC, following contract award).
19. Treat Veterans and their families with care, compassion and respect in all delivery of services.

1.9.2 Client Responsibilities

The client will:

1. Actively participate in the intake assessment process.
2. Engage in the development of a suitable CTS or ETB Plan and actively participate in the implementation and progression of that plan.
3. Inform the Contractor of any changes in their situation that will affect the progression of the CTS or ETB Plan.
4. Demonstrate a willingness to adapt to a changing job market and consider alternatives when appropriate, when considering training and/or employment options.
5. Be responsible for maintaining copies of their resource materials and products, e.g. resume, labour market information.

1.9.3 VAC Program Management Responsibilities

VAC's Program Management will:

1. Support national implementation and ongoing delivery of CTS/ETB.
2. Provide operational guidance and functional direction to VAC personnel involved in CTS/ETB.
3. Respond to inquiries from the Contractor's employees/personnel on CTS/ETB program policies and legislation.
4. Perform quality review functions.
5. Monitor performance and management reports and follow up on any anomalies or trends detected in those reports.
6. Provide training to VAC personnel, as required.
7. Build and maintain working relationships with Contractor staff.
8. Communicate changes regarding service delivery to both the Contractor and VAC personnel.
9. For client specific issues: problem solve and troubleshoot amongst the Contractor, the client and VAC.

1.9.4 VAC Contract Manager Responsibilities

The VAC Contract Manager will:

1. Ensure the smooth coordination and communication between the Contractor and other VAC sections.
2. Ensure that services are provided as described in this SOW.
3. Liaise with the Contracting Authority, if there are any contract issues.
4. Chair the Contract Management Committee.
5. Coordinate all payments to the Contractor for all services rendered as outlined in the Basis of Payment and in accordance with the SOW time frames.
6. Ensure the Departmental Security Officer (DSO) is advised if and when the Business Continuity Plan is activated.

1.10 Estimated Client Numbers

A detailed breakdown of estimated client volumes can be found in Annex A. The forecasted work volume data set out in Annex A is being provided purely for information purposes. Although it represents the best information currently available, VAC does not warrant or represent that the data is complete or free from error. The estimated number of clients may increase or decrease over the life of the Contract based on changes to program eligibility or legislation.

2.0 CAREER TRANSITION SERVICES AND EDUCATION AND TRAINING BENEFIT

2.1 Description of Services

This section provides a high level description of the expectations around the services that will be provided to clients. Specific details on the resources and IT requirements can be found in section 6 of the SOW.

2.1.1 The Contractor will provide the ability for the client to contact them free of charge through on-line, telephone and face to face via webcam (videotelephony), in whichever way is appropriate for the type of inquiry and/or level of service. The client must be able to leave messages, free of charge, and have direct contact to a career counsellor if applicable at no cost to them.

2.1.2 Intake Assessment/Re-assessment

The Contractor must provide access to an intake assessment/re-assessment. It is a self-completed assessment/screen that gathers baseline information and identifies the client's occupational goal and perceived career exploration and/or transition service's needs. Occasionally, clients may require assistance in completing this self-assessment tool, which the Contractor must provide.

2.1.3 Career Counselling and Education Planning

The Contractor must provide career counselling and education planning. This includes the initial development, progress monitoring, updating of a career transition or education plan, post-employment transition support and closure. The plan identifies the chosen occupational goal and the services needed to achieve this goal including educational counselling, labour market information services, on-line resources and instruction, one-on-one career counselling, referrals to other organizations and Job Finding Assistance, which may include Job Placement, when applicable.

2.1.3.1 Educational Counselling

The Contractor must provide educational counselling to support the identification of the educational requirements needed to achieve the client's identified career goals.

2.1.3.2 Labour Market Information Services

The Contractor must assist the client in finding relevant information about the labour market in the area in which they wish to reside. This would include, but is not limited to, information about the local job markets, available career opportunities, salary levels within the local job market, required experience, education and skill level for various occupations within that job market. The intent is not to complete a labour market assessment but to assist and teach the client how to locate the necessary information related to their interests and occupational goals.

2.1.3.3 On-line Resources and Instruction

The Contractor must develop and/or deliver online modules that will enable clients to engage in self-directed learning and skills development in support of obtaining a career in the civilian labour market. The modules are expected to guide the clients on access to and use of existing/available resources in the subject areas. These modules will be available through the Contractor's web portal and will be free of charge to access for all clients. The modules should follow industry best practices for career transition as well as adult learning. Details on the content that these modules should cover is provided in Table 2.

2.1.3.4 One-on-One Career Counselling

The Contractor must provide one-on-one career counselling, tailored to the needs of the client, to assist and teach them how to: translate and document their skills and abilities, assess their interests and aptitudes, prepare for the job search process, write resumes and cover letters, prepare for interviews, self-market, and, where applicable, apply for an education and/or training program. The goal is to provide the client with the necessary skills and competencies required to manage their career, based on their individual goals, throughout their working life.

Prior to the Contractor providing one-on-one counselling in a subject area, it is expected that the client will have exhausted the on-line services available on that subject.

As part of career counselling and the individual's CTS Plan, the Contractor will provide referrals to other community resources and programs that may provide additional learning and support for career development. The Contractor will follow-up with the client as part of ongoing counselling to ensure referrals are successful and effective.

2.1.3.5 Referrals to Other Organization

The Contractor must provide referrals to other organizations where they are available to support the client's achievement of their goal. This includes Provincial, Territorial and Military resources.

2.1.3.6 Job Finding Assistance including Job Placement

The Contractor must provide individualized assistance to clients to teach them how to search and apply for jobs and navigate the job market. As part of these individualized sessions, the Contractor may provide, dependent on the needs of the client, support to help a client prepare for a specific hiring process, assistance in connecting to one or more employers with an interest in the client's skill set, and help in identifying and resolving, general employment related barriers and/or challenges to support a successful transition to a career in the civilian workforce.

In addition, clients who are experiencing difficulty in obtaining civilian employment may receive additional assistance from the Contractor in locating employment opportunities by utilizing job finding assistance including job placement hours to match to specific jobs. In certain circumstances, the Contractor may be required to increase the intensity and frequency of individual career counselling. This increased counselling may include specific help with job placement such that the counsellor locates potential job opportunities, helps the client navigate the application and selection processes for each job, and provides support through to hiring, including providing guidance on how to communicate with the employer about any special needs or requirements once employed.

As part of Job Finding Assistance including job placement, the Contractor will also ensure that clients have access to existing job banks and networks of employers to ensure that clients have access to up-to-date information on job opportunities within their area and to support referrals. The Contractor is not required to create and maintain a job bank solely for the purposes of this contract.

2.1.3.7 Pre-Plan Closure/Employment Transition Support

The Contractor must provide support to the client during the initial phases of employment and/or prior to the closure of a plan. They must contact the client a minimum of once and a maximum of twice in the three month period between career counselling/Job Finding assistance including job placement and file closure, to do a status check in relation to the client's success with or search for employment.

2.1.3.8 Closure

Three months after the completion of the last goal on the career transition plan, the Contractor must close the Career Transition Plan and have the client complete a closure report.

2.2 VAC Referrals for CTS Program or ETB

2.2.1 Clients interested in participating in the CTS program or the ETB will apply to VAC for establishment of eligibility.

2.2.2 Once VAC establishes eligibility, VAC will transfer client referrals to the Contractor to initiate an assessment/services, as relevant. VAC is responsible to identify, extract and compile eligible client data and forward to the Contractor electronically. Additional information on Information Technology (IT) requirements for this data transfer are described under section 6.

2.2.3 As part of the referral, VAC will provide: client identification information; client type (e.g., CAF member, CAF Veteran, spouse/common-law partner, survivor, CFIS recipient, ETB Veteran only); and, the effective date and termination date (if applicable) of the client's eligibility for the CTS program or the ETB. The Contractor will receive updates to this information as they occur.

2.2.4 The Contractor must notify VAC of the date of initial contact with the client. The information required by VAC will be the ID, Name, and Initial Contact date.

2.2.5 The purpose of the VAC referral is to notify the Contractor of a new CTS client who is ready for an intake assessment. The Contractor will do an assessment of the client's career transition needs and/or the development of a CTS or an ETB Plan, in accordance with the client type and complement of services for which the client is eligible.

2.3 Subsequent Self-Referrals for CTS Program or ETB

2.3.1 Subsequent to an initial referral for service from VAC, some CTS clients or ETB Veterans may self-refer for services during the remainder of their working life/program eligibility. The client continues to be eligible for the CTS program or ETB as long as there is no termination date relevant to the client's eligibility that has passed. The expectation following self-referral is that the Contractor will confirm that the client continues to be eligible (using the relevant termination date associated with the client's eligibility) and, confirm with the client the services for which they are eligible. This includes obtaining the necessary supporting documentation from the client. This information will need to be stored and accessible by VAC in electronic form in accordance with section 6 of the SOW, if applicable.

If, at self-referral, the Contractor finds the client is no longer a resident of Canada, the client is no longer eligible for the CTS Program. The client needs to be referred back to VAC for a closure decision as CTS is no longer available to the client.

2.3.2 The purpose of the self-referral is for information provision, an assessment of the client's career transition needs and/or the development of a CTS or ETB Plan, in accordance with the client type and services for which the client is eligible.

2.4 Intake Assessment and Re-assessment

2.4.1 Upon initial referral from VAC or subsequent self-referral, the Contractor must contact

the client and arrange for the provision of information and an intake assessment of the client's career transition needs. See Annex B for the content requirements for an assessment.

2.4.2 It is anticipated that the intake assessment/re-assessment will be completed independently by the client on-line. However, there will be occasions where the client will require assistance by the Contractor. The Contractor must be available to provide this assistance.

2.4.3 An intake assessment will be done for every client. Some Veterans may be eligible for the VAC ETB, but not the CTS Program. In these cases, the intake assessment is required for the ETB.

2.4.4 An intake re-assessment of the client's career transition needs will be required if the services for which the client is eligible change over time. The Contractor must provide a re-assessment of the client's career transition needs given the services for which the client is eligible at the time of the assessment.

2.4.5 Deliverable:

An Intake Assessment or re-assessment that captures the client's reported career exploration, career transition or ETB needs.

2.4.6 Performance Standards:

- The Contractor must contact the client and provide access to/support for completing the intake assessment/re-assessment within three business days of referral from VAC.
- Within two business days of the intake assessment/re-assessment being completed, the data must be viewable by VAC on the Contractor's system.

2.5 Development and Implementation of a CTS or ETB Plan

2.5.1 If the intake assessment or re-assessment indicates that the client has a need for career transition services, a CTS Plan must be developed with the client. The Plan will build upon the client's existing skills and experience and identify the services needed, including the identification of education or training needs. The plan will set out steps/goals to be achieved as well as an expected outcome, based on the services for which the client is eligible. See Annex B for the required content of a CTS Plan.

2.5.2 Where an ETB Plan is developed as part of the CTS plan, the Contractor is expected to validate that the training facility/organization identified is approved as per VAC guidelines that will be provided following contract award.

2.5.3 Where participation in an education or training program is required to make the transition to the civilian labour force and/or achieve the client's career goals/aspirations, but the client is not eligible for VAC's ETB, the Contractor must assist in identifying referrals for the client to other appropriate programs or services that may offer this type of assistance/support.

2.5.4 The CTS or ETB Plan will be updated throughout the client's involvement in career transition services or the ETB to reflect new/changing career transition needs, the services for which the client is eligible, and new/changing details related to any services or education/training program(s) included in the plan, as applicable. The Contractor must notify VAC through a system notification whenever updates are made to the CTS or ETB Plan.

2.5.5 Clients must be provided with access to/copies of all CTS or ETB Plan (and updates to same) developed by the Contractor.

2.5.6 Deliverable: A CTS or an ETB Plan capturing the content required. See Annex B for the minimum requirements of a CTS or ETB Plan.

NOTE: If a Veteran's ETB goals are well defined, the ETB component of the CTS Plan may be developed prior to the remainder of the CTS Plan to facilitate the application for school and approval of funding. Subsequent development of the remainder of the CTS Plan will address the other needs for a successful transition to civilian employment.

2.5.7 Performance Standards:

- The Contractor must complete the initial CTS or ETB Plan within 30 business days of the completion of the intake assessment/re-assessment.
- For an ETB eligible client who has been accepted to and will commence participation in an education and training program within the 30 day period above, the Contractor must complete the ETB Plan/ETB component of the CTS Plan prior to the start of the period of study.
- Within two business days of the CTS Plan being developed, the client will be given access to the on-line tools and resources.

2.6 Recording Progress against a CTS Plan

2.6.1 The CTS Plan will be updated when it is determined that:

- The client requests changes to the expected outcome(s) of their CTS Plan, whether or not they received all or part of the available/planned services;
- When the client type changes and additional associated services are required; or
- During progress monitoring, it is noted by the Contractor that changes will be required.

2.6.2 The progress against a CTS Plan will be documented on the Plan when:

- Expected outcomes are achieved/Plan activities are completed (or discarded/incomplete);
- Plan status and/or anticipated duration has changed.

2.6.3 Performance Standards:

- An updated CTS Plan will be due within 20 business days of the date it was determined that an update is required;
- Progress against the Plan must be documented as it occurs (as per applicable target dates).

2.7 Updating the ETB Plan

2.7.1 The ETB Plan will be updated when it is determined that:

- The client requests changes to the expected outcomes of their ETB Plan
- The Contractor is notified by VAC that progress against the ETB plan requires a change to the ETB Plan.

2.7.2 Performance Standards:

- An updated ETB Plan will be due within 20 business days of the date it was determined that an update is required;
- For an ETB eligible client whose next period of study will commence within the 20 day period above, the Contractor must complete the ETB Plan/ETB component of the CTS Plan update prior to the start of the period of study; or

2.8 Completing the CTS or ETB Plan

2.8.1 The CTS or ETB Plan will be considered completed when it's determined that:

- The client has achieved the expected outcome(s) of their CTS or ETB Plan, whether or not they received all or part of the available/planned services; or
- All available services have been implemented and exhausted even if the client has not achieved the expected outcome(s) of their CTS or ETB Plan.

2.8.2 Deliverable:

Once the Plan is complete, a Closure Report capturing the content required will be submitted. See Annex B for general information around the report requirements.

2.8.3 Performance Standards:

- The Contractor must complete the Closure Report within 20 business days of the date that the CTS or ETB Plan was completed.

2.9 Incomplete CTS or ETB Plan

2.9.1. A CTS or ETB Plan may not be completed for a variety of reasons, e.g., the client no longer wishes to or is able to participate, the client is referred to the Rehabilitation Services and Vocational Assistance Program, the client is no longer a resident of Canada (CTS only) or VAC has otherwise terminated eligibility for the Program.

2.9.2 The Contractor must complete a Closure Report to VAC when a CTS or ETB Plan is incomplete. See Annex B for the minimum requirements of a Closure Report.

2.9.3 Deliverable:

A Closure Report must capture the content required. See Annex B for general information around the report requirements.

2.9.4 Performance Standards:

- The Contractor must complete the Closure Report within 20 business days of the date that the CTS or ETB Plan was determined to be incomplete.

2.10 Notification to VAC

2.10.1 There may be cases where the Contractor identifies client issues/problems impacting the client's ability to be successful in their CTS or ETB Plan, e.g., a client not being able to participate due to their health. The Contractor must identify these cases to VAC as soon as possible.

2.10.2 VAC may determine that the client would be better served by other VAC programs. The CTS or ETB Plan will be considered incomplete and the Contractor will be required to provide a Closure Report. See Annex B for the minimum requirements of a Closure Report.

2.11 Re-referrals

2.11.1 Where a client has been re-referred by VAC and/or has self-referred following closure, they are to be re-assessed and a new CTS or ETB Plan developed, as applicable.

2.12 Maximum Number of Service Hours

The Contractor must provide services to individual clients within the maximum number of hours listed below. These hours include the time required to complete the data/reports listed in Annex B.

Service	Maximum Number of Hours per Plan	Client Type
Intake Assessment/Re-assessment Assistance*	4.5*	All
Career Counselling and Education Planning <ul style="list-style-type: none"> • Planning • Labour Market Information Services 		
On-line Resources and Instruction		
One-on-One Career Counselling** Referrals to other organizations**	7.5	Veterans and Survivors, including CFIS recipients
	7	Releasing CAF Members and Spouses/Common-Law Partners
Job Finding Assistance including Job Placement***	12	Veterans and Survivors, including CFIS recipients
Pre-Plan Closure/On-the-Job Support	1	Veterans and Survivors, including CFIS recipients

*The total time spent by the Contractor assisting with the assessment/re-assessment cannot exceed one hour.

**Including associated planning and documentation activities.

Most clients will not require the maximum allowable number of hours. Prior approval for additional hours beyond the maximum number of hours must be obtained from VAC. Approval must be documented in the Contractor system.

3.0 CTS/ETB PROJECT PHASES

- 3.1** The Contractor must undertake the specific work required for all Phases. The work performed by the Contractor within each phase of the Contract must be delivered to and accepted by the VAC Contract Manager or his/her designated representative. The work under this Contract has been divided into three project phases as follows:
- 3.1.1** Phase 1 – Implementation Phase commences upon Contract Award and ends with the implementation of Operations and Maintenance. In this Phase, the Contractor must customize and/or develop the system and services as required. This phase represents the period when the Contractor will make ready the business solution required to provide the service required. At the completion of this phase, CTS and ETB requirements must be fully functional and the Contractor must be fully equipped to commence full service in accordance with the Performance Standards and Quality Assurance.
- 3.1.2** Phase 2 – Operations and Maintenance Phase is the period commencing on the implementation date, i.e., day following end date of the Implementation Phase and signifies the commencement of all of the services relating to CTS and ETB. This phase ends on the completion of Contract Phase-Out.
- 3.1.3** Phase 3 – Contract Phase-Out is the period that will start, during the Operations and Maintenance Phase, when the Contractor has been given formal written notification by Canada of a specific contract end date. The period of time from such notification until the expiry date of the Contract will be considered as the Contract Phase-Out. During this period the Contractor must undertake activities to ensure the smooth, efficient and complete transition to a new arrangement for CTS and ETB without interruption of service delivery, and respecting requirement for security and protection of personal information.

4.0 GENERAL REQUIREMENTS

4.1 CTS Program and ETB Access

VAC clients frequently move, within a Province, within a region, between regions in Canada, on a temporary or permanent basis. Clients must be able to access the CTS program or ETB services, without interruption, regardless of changes in their residential address.

4.2 Language of Work

4.2.1 As per Section 25 of the *Official Languages Act*, VAC is responsible for ensuring that products, systems and services provided on VAC's behalf by a third party (including the Contractor) include the ability to communicate with VAC clients and provide services in either official language. Use of simultaneous interpreters or translators is not sufficient to meet this requirement. VAC is also responsible for implementing monitoring mechanisms to ensure the availability and quality of these services in their whole.

4.2.2 The Contractor is responsible for ensuring their staff have the ability to provide services fluently in the client's official language of choice. Further, there must be someone at the management level in the Contractor's organization who is fluently bilingual.

4.3 Location of Facilities and Work

4.3.1 All aspects of the Work must be conducted in Canada. Department data and data management services, data centres, networks, and centres of operation must be located in Canada, in compliance with the requirements for secure information management.

4.3.2 All VAC data must be logically separated from all other data (e.g., all other books of business).

4.3.3 Centres of operation, and websites must be accessible, free of charge, by clients/members, from both inside and outside Canada via phone, web and/or mail.

4.4 Hours of Work

4.4.1 On-line resources must be available 24 hours/day, seven days per week.

4.4.2 Remaining CTS/ETB and operations must be provided during core business hours from 8:00 am to 5:00 pm, in each time zone, Monday through Friday, excluding statutory holidays.

4.5 Human Resources Requirements

4.5.1 Career Counsellors

The Contractor must ensure that Career Counsellors:

- have been delivering career counselling/placement services for at least 12 months in the last three years; and
- have a current certification/registration:
 - Canadian Counsellor Certification (CCC);
 - Psychoeducator (Ps.Ed) registered with *Ordre des psychoéducateurs et psychoéducatrices du Québec*; or

- Career Counsellors registered with the *Ordre des conseillers et conseillères d'orientation du Québec*.

4.5.2 Other certification or accreditation from a Canadian association, professional body or institution may be accepted on approval by VAC when combined with acceptable education and related career counselling/placement work experience as outlined below:

- possess minimum academic and professional qualifications (Masters in education/counselling/social work or a Bachelor's degree in a related field); and
- a minimum of 12 months' work experience in career/employment counselling, in the last three years.

4.5.3 For those Career Counsellors who do not have the qualifications outlined in 4.5.1, the Contractor must provide proof of education and qualifications to VAC with the request for approval of the Counsellor. VAC may approve or refuse all such proposed Counsellors based on their education or work experience or professional designation.

4.5.4 For audit purposes, the Contractor must maintain proof of education/qualifications.

4.6 Ethics and Best Practice

Career Counsellors must adhere to the standards, ethics, and best practices in career counselling and transition services.

4.7 Contract Manager

The Contract Manager must have, from date of proposal, at least five years cumulative experience over the last seven years, managing a large contract (at least 250 clients per annum) delivering career counselling or career transition services.

4.8 Employee Security Requirements

All Contractor employees/personnel must hold a valid Reliability Status, granted or approved by the Canadian Industrial Security Directorate of Public Services and Procurement Canada (PSPC). The Contractor must obtain written proof that all employees/personnel meet this requirement prior to the employee/personnel undertaking any work with VAC clients. The Contractor must maintain the security clearances during the contract period.

4.9 Service Innovation

The Contractor must keep current with industry standards for career transition services where those standards exist. The Contractor must:

- present new concepts;
- keep current with the most recent changes in the approach to career transition; and
- make these ideas known to VAC throughout the contracted period.

While compliance with industry standards is important, it is imperative for the Contractor to focus first on the specific requirements as stated in this SOW.

4.10 Revisions/Flexibility

VAC's policies and business processes are subject to revisions as a result of implementation of initiatives and/or changes in legislation or regulations. The Contractor must make any necessary adjustments to the services and/or service levels under this contract as a result of these revisions.

5.0 PROJECT IMPLEMENTATION PHASE – REQUIREMENTS

5.1 Project Coordination Meetings

5.1.1 The Contractor and representatives from the Contractor's staff involved in finance/invoicing, information technology (IT) systems and career transition service delivery, must travel to Charlottetown, PEI, for an initial meeting with VAC staff. This meeting is anticipated to be held within two weeks of contract award and will take place over five days. It will be led by VAC.

5.1.2 VAC will be responsible for providing the meeting room. The Contractor must ensure that appropriate staff are available for the above-noted meeting and make all necessary travel arrangements for their staff. The entire team must be available for the initial three days, and the contract manager and IT staff must be available for the final two days of the meeting.

5.1.3 The Contractor must participate in Project Implementation teleconferences with VAC to identify appropriate contacts and stakeholders, to confirm any required adjustments to the Contractor's plans and identify and resolve project start-up issues.

5.2 Project Implementation Plan and Integrated Schedule

1. The Contractor must implement its Project Implementation Plan, as accepted by the VAC Contract Manager, and manage the Implementation Phase according to the plan.

Related Requirements and Information

- a. The VAC Contract Manager will provide comments and, if required, make recommendations to the Contractor for changes in the Implementation Plan and Integrated Schedule. The Contractor must revise the plan, as required, and obtain final approval of the plan from the VAC Contract Manager. The plan and management of the plan must be based on project management best practices.
- b. The Implementation Plan and Integrated Schedule must include all activities required to ensure that the requirements described in the SOW are met. The Contractor must clearly identify the tasks, goals, deliverables, dependencies, resource build-up and baseline schedule for all activities required to successfully complete the Implementation Phase. The Project Implementation Plan and Integrated Schedule must demonstrate that all services and systems described in the SOW will be ready for implementation, tested in time to correct deficiencies, and certified and accredited prior to the start date of the Operations and Maintenance Phase. Where VAC Contract Manager approval is required for any activity, the Contractor must allow five business days. Activities detailed in the Implementation Plan include, but are not limited to the following:
 - Project Implementation Plan and Integrated Schedule (*Article 5.2*)
 - System Development/Customization (*Article 5.3*)
 - Communications Plans and Materials (*Article 5.4*)
 - Reporting Services (*Article 5.5*)
 - Quality Assurance Program (*Article 5.6*)
 - Business Continuity Plan and Disaster Recovery Plan (*Article 5.7*)
 - Financial Requirements (*Article 5.8*)
 - Contractor Staff Training (*Article 5.9*)

- Privacy Standard Operating Procedures (*Article 5.10*)

The Contractor's Implementation Plan must also include:

- An initial risk assessment and analysis identifying each implementation risk, whether that risk can be controlled or avoided, the probability of occurrence, the possible impact on service delivery and a sound mitigation strategy for that risk.
- c. The Contractor must provide implementation status reports twice per month on progress against the Project Implementation Plan schedule and must also participate in weekly meetings to provide the VAC Contract Manager with elaboration of the written status reports, to discuss and resolve any issues and to manage change throughout the Implementation Period. These meetings will be held by teleconference or videoconference.

5.3 System Development/Customization:

5.3.1 During the Implementation Phase, the Contractor must consult and work with designated VAC staff with subject-matter expertise to ensure that the Business Requirements Document(s) (BRDs) accurately reflect the detailed CTS/ETB requirements. The Contractor must obtain approval of the BRD(s) from the VAC Contract Manager.

5.3.2 The Contractor must develop and/or customize its system(s) and front-end channel to ensure that all CTS/ETB technical requirements are met.

5.3.3 The Contractor must ensure that their existing network, database and application architecture do not limit VAC's business and system requirements for CTS/ETB.

5.3.4 The Contractor must ensure full connectivity and compatibility with the VAC's technical infrastructure through secure web services.

5.3.5 During system design and development, the Contractor must work with VAC's Information Technology Division to determine the appropriate bandwidth, security and connectivity requirements.

5.3.6 VAC will provide the appropriate personnel contacts to coordinate the process of establishing the communication channels.

5.3.7 The Contractor must develop and obtain VAC Contract Manager approval of a Business Continuity Plan (BCP), including a Disaster Recovery Plan (DRP), Pandemic Plan and Crisis Communications Plan.

5.3.8 The Contractor must finalize and obtain VAC Contract Manager approval of the detailed plan of the network that was submitted with the bid.

5.3.9 The Contractor must gather and document the detailed business requirements for the services and systems that will be tailored/customized/developed. The VAC Contract Manager will be responsible for sign-off of these detailed requirements. The Contractor must consult and work with designated VAC staff with subject-matter expertise to ensure that the Business Requirements Document(s) (BRDs) accurately reflect the detailed CTS/ETB requirements.

5.3.10 The Contractor must provide a frontend channel that will consist of a secure web-based client internet portal for CTS/ETB clients. This portal will include but will not be limited to:

- Website help and support;
- Secure messaging;
- Resume writing tool;
- On-line Resources and Instruction (as referenced in Table 2)
- Career Transition counselling sessions via telephone or face to face webcam (videotelephony);
- On-line scheduling appointments capabilities;
- Live chat;
- Mobile application (optional);
- Document upload and retrieval;
- Ability to provide group webinars within the portal; and

5.4 Communications Plans and Materials

5.4.1 General

5.4.1.1 The Contractor must develop a communications strategy, to be approved by VAC, for informing and instructing VAC clients and frontline staff about the CTS Program and ETB offered and delivered through the Contract. The Contractor must provide the translated content and design of all communications material.

5.4.1.2 All products developed by the Contractor to support the delivery of the CTS Program and ETB, including communications strategies, must conform to the Communications Policy of the Government of Canada, found at:

- <https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=30683> and
- <https://www.canada.ca/en/treasury-board-secretariat/services/government-communications/federal-identity-program.html>.

All products must be reviewed and approved by VAC's Communications Division to ensure they are in compliance with the Federal Identity Program and meet the Government of Canada's official languages requirements.

There may be additional "as and when" requirements to develop new or revised materials during the contract to respond to ongoing operation requirements, as determined by VAC.

5.4.1.3 The Contractor must work directly with VAC's Communication Division, in collaboration with the VAC Contract Manager, to develop all communication products and deliverables. Communications Division will ensure the products adhere to Government of Canada policies and to obtain Departmental approvals.

5.4.1.4 All materials must adhere to the guidelines as specified by VAC Communications.

5.4.1.5 All materials must adhere to the *Official Languages Act*.
<http://laws-lois.justice.gc.ca/eng/acts/O-3.01/>

5.4.1.6 VAC will also have a dedicated web page and promotional material on CTS/ETB. Periodically, the Contractor will need to provide information to VAC to help develop this material, e.g., statistics from the program to create a Fact Sheet for public use.

5.4.2 Website

5.4.2.1 The Contractor must develop and provide a website where VAC clients can access information about the services available through CTS/ETB. The information available on the website must include, but is not limited to, client eligibility, Frequently Asked Questions, employer database and on-line training tools. The Personal Portal login button must be available on the website. The website must also provide Contractor contact information to enable clients and VAC frontline staff to contact Contractor employees/personnel. The website must be:

- available in both English and French;
- published live on the internet as of the full contract implementation date; and,
- available 24/7 with an uptime guarantee of 99.9%; and,
- conform to the following web standards outlined by the Government of Canada, found at:
 - Canada.ca Content Style Guide
<https://www.canada.ca/en/treasury-board-secretariat/services/government-communications/canada-content-style-guide.html>
 - Web Accessibility
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=23601>
 - Optimizing Website for Mobile
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=27088>

5.4.2.2 The Contractor must use the following toolkit when developing their website:

- Website Experience Toolkit
<https://www.canada.ca/en/treasury-board-secretariat/services/government-communications/web-experience-toolkit.html>

5.4.2.3 The Contractor website must indicate that it is delivering the CTS Program and elements of the ETB on behalf of VAC on their website.

5.4.3 Social Media

Social Media related to the Career Transition Service Program and ETB will be VAC Communications' responsibility. The Contractor will be required to provide content and updates on the program to support social media messaging. If the Contractor wants to post social media about the CTS Program and ETB they must obtain the approval from VAC prior to publishing or posting any communications via social media (e.g., Twitter, Facebook), print or on-line and all such communications must conform to the requirements in this SOW. Social media communications must adhere to the following TBS Guidelines for Social Media and Web Communications found at:

Mandatory Procedures for Social Media and Web Communications

<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=30682#appD>

Procedures for Publishing

<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=27167>

5.4.4 Advertising

When advertising activities are being considered, the supplier must consult with VAC's Communications Division to obtain approval.

Mandatory Procedures for Advertising

<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=30682§ion=procedure&p=B>

5.4.5 Public Opinion Research

If public opinion research activities are being considered, the Contractor must consult with VAC's Communications Division to obtain approval.

Mandatory Procedures for Public Opinion Research

<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=30682§ion=procedure&p=C>

5.4.6 Content Quality Assurance

5.4.6.1 The following quality assurance requirements apply to the development of communications and promotional material:

- As per the Communications Policy of the Government of Canada, the quality of communications is a shared responsibility across the federal government.
- The quality of content must be ensured through a rigorous editing and translation process. Content must be:
 - clear and in plain language, i.e., fitted for the target audience;
 - error-free, i.e., spell checked and following grammatical rules found in "*The Canadian Style for English*", and the "*Guide du Rédacteur de l'administration fédérale*" for French; and
 - in compliance with the requirements of the *Official Languages Act*.

5.4.6.2 Translation of content must be carried out by a certified language specialist (i.e., certified translator) and reviewed by another certified language specialist (i.e., certified reviser).

5.5 Reporting Services

5.5.1 During the implementation period, the Contractor must develop performance and management reports as outlined in this SOW and as per specifications and format approved/agreed to by VAC.

5.5.2 The Contractor must develop, during implementation, a plan for obtaining client feedback. The Contractor must utilize an on-line client feedback tool, approved by VAC.

5.5.3 Final report specifications and frequencies will be provided during the implementation phase, although the Contractor should expect that monthly, yearly (calendar and fiscal year), and contract to date management, performance and financial reporting will be required,

including provincial/territorial breakdowns of report contents. Table 4 provides an outline of the types of management and performance reports that are required.

5.5.4 All billable services rendered must be linked to the relevant client in the data architecture. VAC must be able to report on all services rendered for a specific invoice, payment, or period (e.g., calendar year, Government of Canada (GoC) fiscal year, contract year and payment period). Each invoice for a billable service must be linked back to the relevant client(s) in order for VAC to calculate what was spent on that client(s). This would be included as part of the data extract.

5.5.5 Reports must be available in both Canada's official languages, English and French, when required.

5.5.6 The Contractor will make all client specific data available for loading into VAC's data warehouse (via a data extract).

5.6 Quality Assurance Program

5.6.1 The Contractor must establish and maintain a quality assurance program by conducting regular quarterly reviews of the work activities performed by Contractor employees/personnel. Quality assurance activities conducted by the Contractor must focus on compliance with established business processes and VAC service standard requirements including adherence to privacy. The results of the quality assurance activities performed by the Contractor must be submitted to VAC on a quarterly basis.

5.6.2 Quality assurance activities may also be performed by VAC to evaluate the Contractor's performance. The Contractor will be notified in writing by VAC of any identified service quality issues. The Contractor must submit an action plan to VAC for approval listing any corrective measures it proposes to take in order to remedy the identified service quality issues prior to implementing any such corrective measures. The action plan must be submitted by the Contractor to VAC within five business days of the written notification.

5.6.3 The Contractor must have a quality management plan that addresses service areas to be improved as determined through its own quality assurance program, through feedback from VAC and findings from the client feedback survey. This quality management plan must address all components of the contract. This plan must be made available to and approved by VAC.

5.6.4 The Contractor will inform VAC of client complaints received and steps taken to resolve issues.

5.7 Business Continuity Plan (BCP) and Disaster Recovery Plan (DRP)

5.7.1 The Contractor must develop and obtain VAC approval of a BCP and DRP.

5.7.2 The Contractor must align the BCP and DR plans with the Policy on Government Security and other governmental guidelines, standards, directives relevant to BCP.

5.7.3 The PA reserves the right to develop and conduct exercises for the Contractor's BCP and Disaster Recovery/IT Continuity plan to ensure compliance with requirements and validate plans.

5.8 Financial Requirements

5.8.1 The Contractor must submit invoices for individual items indicated in the Basis of Payment. In addition to the general requirements discussed in section 4, the Contractor will indicate:

- Cross-reference to the section of the contract/Basis of Payment being billed
- In the case of 6.1 and 6.7.4, all relevant supporting documentation, per the National Joint Council Travel Directive.

5.8.2 Invoices are to comply with requirements as described in section 6.

5.9 Contractor Staff Training

5.9.1 The Contractor will be responsible for training their staff on VAC Programs and requirements.

5.9.2 The Contractor must develop and provide training on the military life and culture and how this applies to the provision of career transition services to all their Career Counsellors prior to them providing direct services to clients.

5.9.3 All training materials must be bilingual and receive prior approval by VAC.

5.9.4 The Contractor may be required to provide information to support the development of internal VAC training sessions.

5.10 Privacy Standard Operating Procedures

The Contractor must develop Standard Operating Procedures, in consultation with the VAC Contract Manager and ATIP, during the contract implementation phase to include details surrounding a potential breach of personal information and requests for information. These procedures must be approved by VAC.

6.0 OPERATIONS AND MAINTENANCE PHASE REQUIREMENTS

6.1. Management Meetings

6.1.1 The Contractor must attend semi-annual face-to-face meetings with the Contracting Authority and the VAC Contract Manager. The purpose of these meetings is to discuss the progress and performance of the Contractor, the status of the deliverables, quality control audits and any issues or potential problems. The agenda will be drafted by the VAC Contract Manager in consultation with the Contractor and the Contracting Authority. The meetings will be held at the Contractor's location and are expected to be a maximum of two days in duration. The Contractor will be notified at least two weeks prior to the meeting.

6.1.2 The Contractor may be required to attend additional Contract Management meetings, as determined by the Project and/or Contracting Authority, other than the regularly scheduled semi-annual meetings if the need arises. The agenda will be drafted by the VAC Contract Manager in consultation with the Contractor and the Contracting Authority. The meetings will be held at a location chosen by the VAC Contract Manager and are expected to be a maximum of two days in duration. The Contractor will be notified of the requirement for an additional meeting at least two weeks prior to the meeting.

6.1.3 The Contractor must attend regular (e.g. weekly) contract management meetings chaired by VAC. The purpose of these meetings is to discuss issues as they arise, monitor Contractor performance, etc. The meetings will be held via teleconference and will usually be one hour in length. The agenda will be drafted by the VAC Contract Manager in consultation with the Contractor and the Contracting Authority.

6.2 Contract Administration Office

6.2.1 The Contractor must maintain an office with the responsibility to oversee the performance of the Contract and ensure all requirements and service standards specified in this SOW are met. This office will be VAC's primary point of contact for administration of the Contract and must be responsible for the administration, planning, coordinating, managing and prioritizing of the contract requirements and all deliverables.

6.2.2 The responsibilities of this office must include but are not limited to:

1. Processing all administrative invoices;
2. Responding to VAC inquiries;
3. Performing contract management and administration activities and functions;
4. Acting as a liaison with the Project and Contracting Authorities;
5. Ensuring that all requirements are well planned and conducted in a seamless manner;
6. Preparation and submission of reports and data deliverables;
7. Maintaining, controlling and ensuring that all Contractor employees/personnel have the necessary experience, qualifications, valid and current security clearances and training and certification requirements;
8. Preparing and submitting invoices for specific deliverables;
9. Performing quality control of all contract deliverables, workplace health and safety, incident reports; and
10. Ensuring compliance with VAC's Performance Measures and Management Reporting requirements.

6.3 Contract Manager

The Contractor must have a Contract Manager who will be the Contractor's authorized representative for interfacing with the Project/Contracting Authorities and any other required program contact points. The Contract Manager must be responsible for overall contract management activities to ensure that all Contractor obligations are conducted in a professional manner and meet the priorities and requirements of this SOW.

6.4 Training

6.4.1 The Contractor must be responsible for ongoing training to their staff on CTS and ETB to ensure consistency in the delivery of these programs throughout the duration of the contract. The Contractor must make updates as and when required by VAC. Training materials must be bilingual and approved by VAC.

6.4.2 The Contractor may be required to provide information to support the development of internal VAC training sessions.

6.5 Technical Requirements

6.5.1 The technical requirements are subject to security requirements. These requirements are subject to updating and revisions over the life of the contract. The Contractor is required to continually meet GoC security requirements and industry standards as directed by the VAC Contract Manager.

6.5.2 Frontend Channel (web-based client internet portal)

The Contractor must maintain the frontend channel as described in section 5.3.10 throughout the duration of the contract. The Contractor must make changes to the frontend channel as and when required to address client feedback.

6.5.2.1 Website help and support

The Contractor will provide technical support to both CTS and ETB clients. The support will be available free of charge to the client between the hours of 8:00am and 5:00pm in each time zone, Monday through Friday, excluding statutory holidays.

There will be two levels of service:

- Level one will provide the ability to log a non-urgent technical issue, either by leaving a voice message or providing information on line. The Contractor is required to respond within two business days.
- Level two will provide the ability to connect immediately to resolve any issues regarding connections to videotelephony sessions. The Contractor is required to resolve the issue immediately. If it can't be resolved immediately, respond to the client with an update and advise when the issue has been resolved.

6.5.2.2 Secure Messaging

As part of the CTS/ETB portal, the Contractor will provide a messaging component that is secure and adheres to all Government of Canada policies pertaining to security, and client information.

The goal of the secure messaging tool is to allow clients to have interactive communication directly with the assigned contractor agent who is working specifically with the client on their CTS or ETB Plan. The messaging tool will provide communication between the CTS/ETB client and the Contractor, and would support an estimated daily capacity of 1000 page views with an average request size of 1.2MB.

The secure messaging tool will provide the ability to notify clients when they have a new message.

6.5.2.3 Resume writing tool

The Contractor will provide a web-based resume writing tool that will be accessible by CTS or ETB clients 24/7 to assist the client with writing and revising a resume. The resume writing tool must utilize and keep up to date with industry best practices. The system must have capacity for 1000 page views per day with an average request size of 1.5MB.

6.5.2.4 Training Modules

The Contractor will provide training modules on various subjects that may include but are not limited to: interview preparation and questions, cover letter creation, and job search tools. The Contractor will create the training materials with final approval on module content provided by VAC. These modules should be available in multiple delivery channels, with the primary client delivery through the CTS/ETB web portal in an interactive online channel available 24/7 to the CTS/ETB client. Other delivery channels can include but are not limited to group sessions; primarily through telephone or face to face counselling via webcam (videotelephony). The suggested system capacity for client training modules would be a daily capacity of 3000 page views with an average request size of 4MB.

6.5.2.5 Career Transition Counselling Sessions via telephone or Face to Face via Webcam (Videotelephony)

The Contractor must have the capability to have interactive communication with clients via telephone or face to face via webcam (videotelephony) technology. Various CTS/ETB services may be delivered via video conferencing; including but not limited to counselling and training modules. The telephone or face to face counselling via webcam (videotelephony) system must have the capability to interface with multiple users simultaneously. CTS/ETB clients who want to participate in telephone or face to face counselling via webcam (videotelephony) programs will be responsible for accessing the technology required to communicate with the Contractor via this delivery model. Estimated service capabilities for face to face sessions via webcam (videotelephony) with clients would be a daily capacity of 100 unique video sessions with an average bandwidth of 500KBPS – 1.5MBPS.

6.5.2.6 On-line Scheduling Appointment Capabilities

The CTS/ETB client internet portal will contain the capability for client to view the calendar of the Contractor's career counsellor staff from an availability / busy perspective, and allow clients the flexibility to schedule appointments at their convenience. Estimated service capabilities for On-line scheduling by clients would be a daily capacity of 1000 page views with an average request size of 1.2MB.

6.5.2.7 Live Chat

The CTS/ETB client portal must offer a secure live chat component as an option for the client once they have logged into the CTS/ETB portal. The live chat tool would link to the next available career counsellor, and allow clients to ask / answer questions with a counsellor at their convenience. The Live Chat tool would be available during the posted service hours of the CTS/ETB program. Possible live chat daily capacity would be 1000 page views, with 10,000 messages with an average request size of 1.2 MB initially, 10KB per message thereafter.

6.5.2.8 Mobile Application

The CTS/ETB Contractor can optionally provide their CTS/ETB online portal functionality as a Mobile Application to the CTS/ETB client base. The application could have the capacity to provide all services available on the client portal to a mobile device, and with an estimated daily capacity of 1000 dynamic screen changes and an average request size of 1.2MB.

6.5.2.9 Document Upload and Retrieval

The CTS/ETB secure web based client internet portal must have the availability for clients, VAC and CTS/ETB career counsellors to upload and retrieve documents once logged on to the system. Such documents would be stored in a secure environment and only accessible to authorized staff or the individual client. The system should have a minimum capability of 1000 daily page views, and an average request size of 1.5 – 3 MB.

6.5.2.10 Group Webinars

The CTS/ETB secure web based client internet portal must have the ability to provide for group webinars, for a maximum of up to 10 people per session, based on client feedback received on topics of interest. Webinar schedule and topics to be validated by VAC.

The contractor may identify opportunities to provide group sessions when clients are seeking similar information/training and support services and the Contractor identifies that clients may benefit from learning and career counselling in a group environment. These sessions will be counted as part of each individual's counselling hours. The client must be in agreement with this approach.

6.5.2.11 Access to Query and View Functions for VAC Staff

The Contractor's CTS/ETB system will provide authorized VAC staff with the ability to access CTS/ETB program information within the Contractor's system to view information and perform information queries within the CTS/ETB system. This system capability is required for verification of data between the CTS/ETB system and the Microsoft CRM system.

6.5.2.12 Contractor Training Database

The Contractor must provide a systems environment specifically for training purposes, which duplicates all aspects of the production environment. Data used in training sessions is subject to the privacy standards of the Contract and, therefore, the Contractor must ensure that any data which identifies a client / member is masked to ensure that personal information cannot be attributed to an actual client.

The training environment must be refreshed with each production release of system changes.

6.5.3 Graphical User Interface

6.5.3.1 The Contractor's system must include graphical user interface screens in a Windows environment that is compatible with the technical infrastructure for VAC. Screen layouts and functionality must conform to appropriate GoC information technology requirements and standards, and *Official Languages Act* requirements. The information must be available in an integrated, graphical user interface supported with clearly defined documentation and easy navigation tools.

6.5.3.2 The system screens must provide search capabilities and "print friendly" functions.

6.5.4 Communications between Contractor and VAC Systems

6.5.4.1 Data Exchange

The Contractor must provide the ability to electronically communicate between the CTS/ETB and VAC systems. The solution must provide the following two types of exchange:

6.5.4.1.1 Real Time Data Exchange

- The Contractor must host RESTful web services that will be used to add, update, and delete client biographical and CTS/ETB related information from VAC's system. The Contractor must also host RESTful services to return detailed program data, on demand, from the CTS/ETB system.
- The Contractor must call VAC hosted RESTful web services to deliver CTS/ETB data to VAC in response to events deemed significant by program management within the CTS/ETB system.
- The Contractor must support web service payload data including but not limited to, text data such as client bio and CTS/ETB program data as well as binary data such as scanned and text-only PDF documents.

6.5.4.1.2 Bulk Data Transfers

- Required for any large data extract files required on a weekly, monthly, annual or ad hoc basis.
- The Contractor must use PSPC's Managed Secure File Transfer (PSPC MSFT) as the method of sending bulk data.
- The Contractor must ensure that Bulk Data Transfer data formats available include, but are not limited to, XML, CSV, and other ASCII delimited file formats.

6.5.4.2 The Contractor must have the capability of exchanging information with VAC for purposes such as client program eligibility, status, coverage and events.

6.5.4.3 The Contractor must facilitate transactional exchanges between the CTS/ETB application and VAC (individual, synchronous messages relating directly to an event in one system or the other). Transactional data must be transferred and applied synchronously and in real time.

6.5.4.4 All of VAC's access to Contractor systems must be compatible with VAC's software and able to run on the VAC LAN/WAN.

6.5.4.5 Data exchange will take place in a secure manner without manual intervention, using the protocols and procedures specified by the SOW, as per specified federal security requirements for Protected “B” information. (Reference CSE publications for guidance.)

6.5.4.6 Data Exchange Format

All transactional data that is exchanged to/from VAC, with the exception of binary pdf documents, must be in Extensible Mark-up Language (XML) format and conform to XML Schema Definitions (XSD's) that will be drafted during the design/development phase. All transactional data sourced from the Contractor's system must meet the following requirements:

- All such data must have a “date created” and a “date last updated” date and time stamp, using Greenwich Mean Time (GMT).
- Each transaction must indicate whether the record is a Delete, an Insert, Select or an Update. The XML stream must contain all fields and data in the applicable record.
- Each transaction must contain VAC's primary identifier for the client.
- Binary documents will be transferred using binary to eliminate overhead required for encoding Base64 for xml transfer.

6.5.4.7 The Contractor must supply a data dictionary in electronic format, providing Canadian French and Canadian English descriptions of all data records and fields, along with field lengths and data types. Any changes to the data structure must be sent to VAC at least one month in advance of the changes.

6.5.4.8 The CTS/ETB system must have export capabilities, such that upon the request, the Contractor must export CTS/ETB data, either in whole or in part, as specified by VAC. The export must be made available in multiple formats including Binary, Extensible Mark-up Language (XML), Comma Separated Values (CSV), and other ASCII delimited formats.

6.5.4.9 Data Exchange System Integration

To facilitate transactional data exchange with VAC, the Contractor must maintain a message queuing infrastructure that will interface with VAC's transactional data exchange product in real time to allow for seamless information exchange.

The Contractor must provide a separate, secure infrastructure to allow for the secure transmission of large volume files between the Contractor and VAC using MSFT.

6.5.5 VAC Supplied Data

6.5.5.1 The CTS/ETB system must automatically process VAC transactional data to create, update or terminate client account information on CTS/ETB in **real time**.

6.5.5.2 Data supplied to the Contractor from VAC includes but is not limited to:

- Client Biographical Information (e.g., name, address, contact information).
- Client Eligibility Information (e.g., eligibility type, effective dates, client type, level of need).
- Other required/relevant client information (see table below).

6.5.5.3 The following table identifies data elements that the Contractor's IT system must capture, store, manage, transfer to VAC and protect. This is not an exhaustive list. VAC will identify any additional data elements that may need to be captured, stored, managed and protected in order to produce and/or manage reports. Subsequent sections describe the purpose for capturing and storing this data.

Registration/ Intake Bio Information	Core Activities
VAC ID and/or Service number Client Name Client Type Address & Telephone # Date of Birth Date of Death Gender District Code Eligibility status Start & End dates Language Code CTS/ETB Counsellor Electronic Referral date/time VAC referral Date Date of attempted contact(s) Date first contact made with client Progress Notes Career Transition Plan Career Transition Goals confirmation ETB Plan (including objectives of the plan, type of educational institution, courses, credentials to be obtained, timelines of semester/course/program, costs) ETB Plan goals (including target dates & completion dates) Closure Reports Access to on-line modules Client confirmation of modules rec'd Client conformation of contact Date, time, type & # of activity hours Date & # of courses (not ETB) Periods of Study (course, duration, results) Track change in status of client type (still serving, releasing, released) Employment status Education Level Training and Skills Summary Occupational Goal Client Identified Needs	Date of initial contact with client Plan Development Activities/Assessments Progress notes & File comments Activity & Report dates Training & Job Search Special Instructions Job Readiness activities Job Search Preparation Activities Job Finding Support Activities, including Job Placement Active Job Search Activities National Occupational code Client Goal Employment Status Training Program Type Progress notes with client, Closure form report details Dates of contact with client, Work Items Documents

6.5.5.4 The Contractor must be able to report on the breakdown of all costs by client and by activity. This would require that the date, time, type and number of activity hours (e.g., counselling) must be tracked and recorded for each client.

6.5.6 Network Acquisition and Set-up

The Contractor must be responsible for the design, development, acquisition, testing, maintenance, operational support and implementation of any network infrastructure required outside of VAC's external firewall to meet security and service-level requirements as outlined in various sections of this SOW. The Contractor must ensure full connectivity and compatibility with VAC's technical infrastructure.

6.5.7 Service Provision

6.5.7.1 All traffic between the Contractor and VAC must be IP based and remain under the control of VAC. All HTTP traffic must be secured with Transport Layer Security (TLS), which must comply with Communication Security Establishment Canada's Guidance on Securely Configuring Network Protocols with the GoC (ITSP.40.062).

6.5.7.2 All Contractor CTS/ETB application-hosting sites must be accessible via DNS either through a remote server or through a documented list provided to VAC with address details.

6.5.7.3 Real-time monitoring on circuit utilization, availability and interface statistics must be done for troubleshooting and trend analysis. Unscheduled outages must be reported using Incident and Problem Management. A Root Cause Analysis Report is required identifying the cause of the outage, actions taken to resolve the outage, and actions taken to avoid future outages. Planned outages must be communicated to the VAC Contract Manager at least five business days beforehand and approved by the VAC Contract Manager. Timing of maintenance outages are to be negotiated with the VAC Contract Manager.

6.5.7.4 The Contractor must install a network management mechanism to ensure network traffic can be prioritized and shaped to meet service level agreements as outlined in this document (i.e., client service applications to get priority over file transfer traffic).

6.5.8 Technical Evaluation

The Contractor must conduct a routine technical evaluation of the CTS/ETB networks and technical architecture to ensure continued compatibility and performance and to identify and address necessary upgrades and overall maintenance and support. The Contractor must provide the results of the technical evaluation to the VAC Contract Manager, for review. In the event modification is determined to be required, the VAC Contract Manager will identify said requirement to the Contractor. The Contractor must then proceed to modify/upgrade the network and technical architecture, as required.

6.5.9 System Enhancements During the Life of the Contract

The VAC Contract Manager may require CTS/ETB system enhancements during the Operations and Maintenance Phase of the contract, with specific emphasis on the need for special programming, software changes, new development, infrastructure changes, ad hoc queries or special report requests. In the event modification is determined to be required, the VAC Contract Manager will initiate the requirement. The Contractor must then proceed to modify/upgrade the software, network and technical architecture as authorized by the VAC Contract Manager.

6.5.10 Network Maintenance

6.5.10.1 The Contractor must maintain the network in accordance with an approved detailed

plan of the network (System Architecture) showing all connections, and infrastructure as well as detailed specifications of the software, operating systems and a document plan of how the networks will be established and maintained throughout the life of the Contract.

6.5.10.2 VAC may from time to time request changes in the network configuration in reaction to changes within their own organization. This could include additions, changes or deletions of connection to the network. VAC will provide the Contractor with advance notice of any proposed changes in network configuration. The Contractor must address a strategy to handle this type of request in the System Architecture plan.

6.5.10.3 The IT infrastructure for CTS/ETB outside VAC's jurisdiction, but within the control of the Contractor, must facilitate the realization of service level agreements as outlined in this document.

6.5.10.4 Upon the update of the Threat and Risk Assessment (TRA) or a Vulnerability Assessment, the Contractor must provide a network architecture diagram and report, demonstrating that all architectural elements comply with established security requirements.

6.5.11 Operations Infrastructure

6.5.11.1 In order to meet the operational service and support requirements and deliver the services defined herein, the Contractor's computer facilities must incorporate:

- Data communications facilities to support secure transmission of information between and among:
 - Clients and the Contractor;
 - VAC and the Contractor.
- Separate sub-environments for:
 - Applications development;
 - Testing;
 - Training; and,
 - Regular system operations in production.

Production operations must not be run on the development or testing facilities and vice-versa. Testing and training environments must mirror the Production environment and be fully synchronized with all changes and enhancements. The training environment data must be refreshed to production monthly and maintain anonymity of client data. The test environment must be refreshed before and after each production release and maintain anonymity of client data. As part of its solution, the Contractor must ensure VAC has access to the testing, training and production environments. **The environments will be used by VAC during system testing, integration testing, regression testing, stress/performance testing, functional testing, security testing, acceptance testing, the validation of electronic data loads (and manual file updates where these are necessary) and report generation. The Contractor must coordinate test data with VAC to ensure test cases can be executed. The Contractor must ensure there is enough data to cover multiple test scenarios based on test ID's supplied by VAC.**

- Off-site facilities and systems for storing backups and a fail-over site for disaster recovery must be set up and maintained, as per the industrial security manual published by PSPC <http://iss-ssi.pwgsc-tps qc.gc.ca/msi-ism/index-eng.html>.

- Full data centre operation requirements such as heating, ventilation and air conditioning (HVAC), uninterruptible power supplies, backup power supplies, diesel generators, raised floors, and physical access controls. All environments and facilities, including fail-over facilities, where protected information is handled and stored, must adhere to the security requirements defined in this SOW. System hardware and infrastructure must be compatible with GoC hardware and software standards and security requirements for personal computers.

6.5.11.2 CTS/ETB System Availability

- The CTS/ETB data exchange facility as well as the CTS/ETB system portal will be available 24 hours each day/every day.
- The Contractor must advise VAC of any planned shutdown at least five business days in advance and must inform clients of an approved downtime for system maintenance at least 24 hours in advance of the shutdown.

6.5.12 Systems Management and Maintenance

The Contractor must maintain all systems including, but not limited to, applications, websites, electronic forms, functions, and tables.

6.5.12.1 Related Requirements and Information

- The Contractor must provide and manage a change management process, services and systems based on ITIL best practices. The Contractor is accountable for submitting change requests to be approved by the VAC Contract Manager as well as any testing results and implementation resulting from an approved change. The VAC Contract Manager will be responsible for prioritizing all change requests and approving the timelines for implementation.
- The Contractor must participate in periodic IT meetings with VAC via teleconference. These meetings will review all major problems affecting the network and will be a forum for scheduling of technical maintenance.
- The Contractor must be responsible for providing an incident management system for managing the process that would allow for an incident ticket to be opened, assigned to a user support team member, and closed upon its resolution. The Contractor must log problems as they occur or are reported into an incident management tool.
- The Contractor must define and submit, for the VAC Contract Manager's review, service standards for assessing, resolving or escalating incident/problems. The tool and problem log must be accessible to the VAC Contract Manager on-line. VAC staff, designated by the VAC Contract Manager, would be part of the user support team and could have incident tickets assigned to them for resolution.
- Once a problem log has been identified, the VAC Contract Manager must be notified and advised of an Estimated Time to Repair or a Problem Resolved Explanation, as appropriate. The Estimated Time to Repair may be updated upon further problem analysis and the Contractor must issue a Problem Resolution Explanation when the problem has been resolved.
- The Contractor must provide and manage release and configuration management systems and processes based on ITIL best practices. The Contractor must be accountable for maintaining a release log of all changes between releases and for updating the configuration information of the current release. The release and configuration management processes and reports are to be made available

electronically to authorized VAC staff. The Contractor is also responsible to provide a post release report no more than 15 business days after each release. Critical problems must be addressed, fixed and their solutions released immediately. All other system changes, fixes and patches must be addressed and released based on an approved schedule. VAC's approval of the release must be required prior to the release date.

- VAC must be notified of system changes which are initiated by the Contractor at least 15 business days prior to the release even where there is no apparent impact to CTS/ETB.
- The Contractor must back-up systems and data as per the defined schedule. Back-ups must be encrypted via a CSE approved algorithm. The Contractor must perform daily, weekly, monthly and yearly system back-ups, including all data and program software source code for the backing-up of protected data. All back-ups must be kept off-site, at a minimum distance of five kilometres from the main site and in secure, fire and flood protected storage cabinets. Back-ups must be the property of Canada and the Contractor must not destroy any data without the written consent of the VAC Contract Manager. Prior to destruction, back-ups must first be erased and the data contained therein rendered unrecoverable. Back-ups that have contained "Protected B" data are never to be sold, auctioned, donated, or discarded.
- The Contractor must perform restore tests on a quarterly basis and produce a quarterly Back-Up/Restore Test report for the VAC Contract Manager's review. All back-ups must be in an industry standard format that allows them to be read and restored by other back-up infrastructures or systems, if required. The VAC Contract Manager must have the ability to request back-ups to be restored by the Contractor.

6.6 Business Continuity Plan (BCP) and Disaster Recovery Plan (DRP)

6.6.1 The Contractor must implement the approved BCP, including a DRP, Pandemic Plan and Crisis Communications Plan and ensure that all plans included in the BCP are kept current through annual reviews.

6.6.2 The Contractor must test each of the plans, contained in the BCP, annually and submit a report detailing the results of the test to the VAC Contract Manager no later than 20 business days following the test. The results must also include best practices that were achieved. The portions or elements of the plans being tested must be selected in agreement with and on approval of the VAC Contract Manager. The VAC Contract Manager will be notified not later than 14 business days prior to testing a plan and reserves the right to send designated personnel to monitor the tests. Test results will be reviewed by the VAC Contract Manager in collaboration with the Departmental BCP Coordinator and changes to plans that result from testing must be approved by the VAC Contract Manager.

6.6.3 In the event of a disruption resulting in a lack of service availability, as defined by Service Standards, the Contractor's BCP can be activated by the VAC Contract Manager or the Contractor.

6.6.4 In the event a disruption should occur and results in a service outage, the Contractor must:

- Officially inform the VAC Contract Manager when the BCP is activated;
- Provide the VAC Contract Manager with updates at least twice a calendar day on the status of the situation and the remedial actions being taken;

- Submit a detailed disruption report to the VAC Contract Manager no later than 10 business days following the end of the disruption. The report must include details pertaining to the integrity and completeness of any data that had to be restored;
- Submit an After Action Report (AAR) to the VAC Contract Manager detailing causes, remedial action, preventative measures and best practices no later than 30 business days after the end of the disruption; and
- Submit proposed changes, resulting from the disruption, to the VAC Contract Manager for approval.

6.6.5 VAC may periodically undertake audits to be carried out by the Departments' internal or external auditors to ensure compliance with any element of the Contractor's BCP. The Contractor must cooperate and provide timely access to the appropriate files, books, records, systems and staff to conduct such audits and must provide any assistance that may reasonably be required to complete these audits.

6.7 Financial Requirements

6.7.1 The Contractor must provide the following services:

- Invoicing for CTS/ETB Services, including all charges incurred during the implementation, operating, and phase-out portions of the contract;
- Monthly invoices for each service element provided. The supporting documentation must clearly identify:
 - Date the service was provided to the client;
 - Client and client identification number for whom the services were rendered; and
 - Hours billed by client, by service provided.
- Periodic management information in the form of financial information and reports;
- Ad-hoc financial reporting; and
- Access to financial records and client files in support of VAC audit and/or verification activities.

6.7.2 The Contractor is the originator for all financial records dealing with the programs for the Department. The Contractor is also responsible for the storage or scanning of all source documents. This information must be maintained in a data sequence based on client file number stored in files arranged by fiscal years. Further, the Contractor must have the ability to track billable hours by client, and be able to provide this information on request by VAC.

6.7.3 Taking materiality, sensitivity, and risk into account, the Contractor will be responsible for the development and implementation of an adequate financial control framework. The financial control framework must be documented and made accessible in support of VAC audit activities. The financial control framework must be approved by the VAC Contract Manager.

6.7.4 Financial Services / Contract Administration

The Contractor, through their "Financial Services" and "Contract Administration" sections will be required to provide support to this contract on an on-going basis through a permanent organizational structure. This required support relates directly to invoicing for the following:

- Invoicing for direct program costs incurred, e.g., reports, counselling;

- For select travel as determined in the Basis of Payment, invoicing for applicable travel and living costs relating to this contract in accordance with current National Joint Council Travel Directive and Guideline provisions;
- Eligible contract administration charges and other charges for “as and when” required items;
- Ad hoc financial reporting; and
- Access to records and accounting in support of VAC audit activities.

6.7.5 Payment for Services

The Contractor is required to invoice VAC on a separate line item basis for each of the billable charges in the delivery of services under the contract/basis of payment. The invoices must be on company letterhead with a unique identification number and the PSPC contract number. Credit memos, issued by the Contractor, for overbillings, errors, and discrepancies must be subject to the same requirements. Billings/credit notes will contain the following minimum information (as appropriate):

- Contractor’s name and mailing address;
- Date of invoice issue;
- Current billing address for VAC;
- Unique invoice number;
- Payment terms of 30 calendar days;
- Period and service covered by invoice;
- Marked Private and Confidential;
- Required supporting documentation attached;
- Amount invoiced both exclusive and inclusive of applicable taxes;
- Contract number; and
- Procurement business number for the Contractor.

6.7.6 Ongoing Contract Operations

6.7.6.1 The Contractor must submit monthly invoices showing 1/12 of the yearly fixed contact fees for the ongoing contract operations as per the Basis of Payment.

6.7.6.2 Costs not identified in the Contract/Basis of Payment will not be billable under this Contract unless authorized as part of the Change Management Process.

6.7.6.3 The Contractor will invoice VAC periodically for other charges as incurred, not as part of the annual fixed costs, as per the Basis of Payment.

6.7.7 As and When Charges

This component allows VAC to estimate and pay for unforeseen changes to CTS/ETB resulting from, but not limited to, changes in legislation, or policy and other requirements determined to be within the scope of the contract. These changes are to be billed as incurred and must be approved, in writing by the VAC Contract Manager, as part of the VAC/Contractor Change Management Process. If a change is necessary, a written request will be provided to the

Contractor who will carry out a preliminary analysis. This preliminary analysis will serve the purpose of providing estimates of the costs and effort necessary to complete the change. The estimated cost and effort must be submitted by the Contractor to the VAC Contract Manager and tabled for discussions and priority setting during a Change Management meeting. The Contractor must obtain approval in writing for these changes from the VAC Contract Manager, as part of the VAC/Contractor Change Management Process. VAC will not reimburse the Contractor for "As and When" services, products or materials that have not been pre-authorized in writing.

6.7.8 Applicable Taxes

The Contractor must include all applicable taxes as per the Basis of Payment on each invoice submitted for payment to VAC. Questions about the taxes to be levied for billable charges should be directed to the Canada Revenue Agency for clarification.

6.7.9 Reporting Requirements

6.7.9.1 The Contractor will be required to produce ad-hoc reports to VAC which report on client status, services provided, recommended services, and others as required.

6.7.9.2 The Contractor will make client specific data available for loading into VAC's data warehouse. VAC will be able to create its own reports and/or mimic/validate reports created by the Contractor by using this data extract.

6.7.9.3 All billable services rendered will be linked to a client in the database. Thus, VAC will be able to report on all services rendered for a specific invoice, payment, or period (e.g., calendar year, GoC fiscal year, contract year, payment period). Each billable service must be linked back to the individual client who used the service, to calculate what the Department has spent on an individual client.

6.8 Complete Data Extract

6.8.1 Data extracts will be required to fulfil VAC's requirements for management of the information. The Contractor must provide to VAC, a file containing an extract of VAC client data for the purposes of updating the VAC data warehouse. This extract file must be submitted by the Contractor on a regular basis (minimum once per month) to VAC using a two-way file transfer protocol acceptable to VAC. Specifications will be determined following contract award. The Contractor must provide to VAC, during the implementation period, data architecture and data dictionary information related to the storage of VAC client data and will follow the applicable TBS Directive on Recordkeeping that can be found on the following Web site: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=16552§ion=text>.

6.8.2 The data extract file must be in XML format and conform to the following standards:

- All records must have a created and an updated date/time stamp with a user id;
- For data consistency, the system must record transactions using GMT/UTC, rather than local server time;
- Fields must use common names and lengths across all tables. For example, a client identifier would always be referred to as a 'clnt_id' and have the same length and data type;

- All keys and index fields must be clearly marked. All linkages between tables must be clearly marked in the model;
- Any null values must be left as such;
- Records cannot be deleted, but must be end-dated and/or deactivated (active-indicator set to 0 from 1). This makes the system auditable, and eliminates discrepancies;
- On-line screen values must be stored, rather than just calculated;
- Valid screen variable values (lookups) and their French and English descriptions must be stored in code tables, rather than "hard-coded" in the screen logic, so that additions, deletions, and changes to the valid values can be picked up automatically when the code table changes;
- A data dictionary must be provided which has all table and field descriptions. This must be provided in an electronic format, at least one month prior to the end of the implementation period. Any changes must be provided as they are incorporated into the system;
- Volumetrics must be provided for each table, e.g., "approximately 500 new records are added, and 2000 are updated each day";
- VAC must immediately be made aware of all database changes, including field changes, field additions/deletions, field length, type, or precision changes, data fixes, record deletions, and data conversions; and
- Deviations from the above standards must be documented in writing, and submitted by the Contractor to the VAC Contract Manager for approval prior to implementing the deviation.

6.9 Performance and Service Standards

6.9.1 The success of the contract will be judged on the basis of achievement of specific performance indicators outlined below. These performance measures are specific to the Contractor only and contribute to VAC's overall departmental performance framework. The Contractor will be expected to make every reasonable effort to optimise their performance under the contract, and to provide VAC with the necessary information against which performance can be judged objectively.

6.9.2 The Contractor will act in accordance with relevant Canadian Standards and best industry practice.

6.9.3 VAC reserves the right to evaluate the performance of the Contractor. This evaluation may consist of: on-site audits; client surveys; process and outcome measurement; and quality assurance reviews.

6.9.4 Contractor Service Standards:

Table 3: Service Standards Required to be met by the Contractor

Deliverable	Service Standard	Target
Access to on-line tools and resources	Within two business days of receiving of a completed intake assessment	80%
Client contact and access to/support for completing the Intake Assessment/Re-assessment	Within three business days of referral from VAC	80%

Deliverable	Service Standard	Target
Intake Assessment or Re-assessment viewable to VAC on the Contractor System	Within two business days of completion	80%
Initial CTS or ETB Plan	<p>Within 30 business days of the completion of the Intake Assessment/Re-assessment</p> <p>NOTE: For an ETB eligible client who has been accepted to and will commence participation in an education and training program within the 30 day period, the Contractor must complete the ETB plan prior to the start of the period of study.</p>	80%
Updated CTS/ETB Plan	<p>Within 20 business days of the date it was determined that an update was required</p> <p>NOTE: For an ETB eligible client whose next period of study will commence within the 20 day period above, the Contractor must complete the ETB Plan update prior to the start of the period of study.</p>	80%
Closure Report	Within 20 business days of the date that the CTS and/or ETB Plan (whichever is later) was completed/was determined to be incomplete	80%
Follow up Report	Within 20 business days of the end of each follow-up period	80%
Provide VAC the corrective measures proposed to take to remedy the identified client satisfaction/service quality issues	Within five business days of the written notification	80%
Provide VAC with an action plan for corrective measures to remedy service quality issues	Within five business days of the written notification	80%
Respond to non-urgent client technical issues	Within two working days	80%
Respond to urgent client technical issues	Immediately	80%
Communicate planned outages to the VAC Contract Manager	Within five business days before hand	80%
Advise VAC of any planned shutdown at least five business days in advance	Within five business days before hand	80%
Inform clients of an approved downtime for system maintenance	Must give 24 hours' notice in advance of shutdown	80%
Provide a post maintenance release report	Within 15 business days after each release	80%
Notify VAC of system changes which are initiated by the	Within 15 business prior to release	80%

Deliverable	Service Standard	Target
Contractor even where there is no apparent impact to CTS/ETB		
Test each of the plans, contained in the BCP, annually and submit a report detailing the results of the test to the VAC Contract Manager	No later than 20 business days following the test	80%
Notify the VAC Contract Manager when testing a BCP (VAC reserves the right to send designated personnel to monitor the tests.)	No later than 14 business days prior to testing	80%
Submit a detailed disruption report to the VAC Contract Manager Including details pertaining to the integrity and completeness of any data that had to be restored	No later than 10 business days following the end of the disruption	80%
Submit an After Action Report (AAR) to the VAC Contract Manager detailing causes, remedial action, preventative measures and best practices	No later than 30 business days after the end of the disruption	80%
Annotate or correct any personal information relating to clients information in accordance with the <i>Privacy Act</i>	Within 10 business days of receiving written direction from VAC	80%
Respond to VAC upon receipt of a system issue	Within 24 hours of notification from VAC	80%
Provide an action plan on the system issue	Within five business days	80%

6.10 Management and Performance Reporting Requirements

6.10.1 The Contractor must provide detailed management and performance reports so that the level of utilization, quality, and cost effectiveness can be assessed in detail across all elements of the service provided. Reports will provide VAC with information in a format to meet VAC's requirements for management information, statistics, financial control, audit, and workload. Final report specifications and frequencies will be provided during the implementation phase.

Table 4: Outline of the Management and Performance Reports Required to be Produced and Distributed by the Contractor

Topic	Description
Management Reports	

Topic	Description
Service referrals received	Report(s) that provides the number of referrals and re-referrals received for CTS services, by referral source (VAC, self-referral), including the total number of referrals, and average and range of referrals per client.
Client type	Report(s) that provides the number and proportion of those eligible for CTS by client type, CTS status (i.e., active vs. inactive) and ETB Status (i.e., eligible, not eligible, no decision).
Client status	Report(s) that provides the number of active CTS clients who are participating in each stage of service (e.g., referred, intake assessment, Career Counselling/Education Planning, follow-up services).
Intake Assessment	Report(s) that provides the number and proportion of those eligible for CTS/ETB who have undergone an Intake Assessment.
Career Counselling and Education Planning Activities	Report(s) that provides the number and proportion of those eligible for CTS/ETB who have participated in the career counselling and education planning activities, (planning, labour market information services, on-line resources and instruction, one-on-one career counselling, referrals to other organisations, Job Finding assistance, which may include Job Placement, when applicable.
• CTS/ETB Plan	Report(s) that provides the number and proportion of those who have a CTS Plan (with or without an ETB component) or an ETB Plan, overall and by type.
• Educational Counselling	Report(s) that provides the number and proportion of those eligible for CTS or ETB who have been provided with educational counselling, including the total number, average number and range in hours of service, by program(s) eligible.
• Labour Market Information Services	Report(s) that provides the number and proportion of those eligible for CTS who have been provided with information services, by category, including the total number, average number and range in hours of service, overall and by category.
• On-line Resources and Instruction	Report(s) that provides the number and proportion of CTS clients who accessed on-line resources/instruction related to career counselling and education planning, by eligibility group and module/tool/topic, as relevant.
• One-on-one career counselling services	Report(s) that provides the number and proportion of those who accessed one-on-one career counselling services, by modality (telephone, face to face via webcam (videotelephony), including the total number, average number and range in number of hours of service, overall and by category.
• Referrals to Other Organizations	Report(s) that provides the number and proportion of those who were provided a referral to another organization, including the total number, average number and range in number of hours of service. The report should also provide a listing of the organizations referred to and quantity of referrals.
• Job Finding Assistance	Report(s) that provides the number and proportion of those who accessed Job Finding assistance services, which may include Job Placement, by modality (telephone, face to face via webcam (videotelephony)), including the total number, average number and range in number of hours of service, overall and by category.

Topic	Description
CTS/ETB Plan updates	Report(s) that provides the number and proportion of those who have had one or more updates to their CTS/ETB Plan, by total number, average number and range in number of updates overall and Plan type.
Outcomes being achieved	Report(s) that provides the number and proportion of those who have a CTS who have achieved one or more of the goals set out in their plan during the reporting period.
ETB Education/Training	Report(s) that provides the number and proportion of those who have a CTS/ETB Plan that contains education/training, by type (formal education/training program vs. short courses) and funding source.
Closure Report	Report(s) that provides the number and proportion of those for whom a Closure Report was submitted, by closure reason (e.g., CTS/ETB Plan successfully completed, Veteran withdrew, VAC terminated service).
CTS/ETB Plan duration	Report(s) that provides the average and range of duration for a CTS/ETB Plan, overall and by plan type.
CTS/ETB Program duration	Report(s) that provides the average and range of duration of “active” status in CTS/ETB, overall and by Program.
Follow-up status	Report(s) that provides the number and proportion of those who, at each follow-up period (six months and one year) are: employed in a suitable civilian occupation; participating in the civilian labour force (i.e., either working or looking for work); participating in an education/training program; participating in other meaningful activity; or, other (describe).
Outcomes achieved at closure	Report(s) that provides the number and proportion of those who, at service closure/termination are: employed in a suitable civilian occupation; participating in the civilian labour force (i.e., either working or looking for work); are participating in an education/training program; are participating in other meaningful activity; or, other (describe).
Client Feedback Report	Report(s) that provides the results of the Client Feedback.
Performance Reports	
Timeliness of service/access to service	Report(s) that provides the number and proportion of service delivery deliverables/activities that were conducted/completed by the Contractor within the service delivery timelines outlined in this SOW.
Annual performance summary	Annually, a report that summarizes the previous year’s activities on specified aspects, as outlined in the SOW, including: services provided; client service delivery standards.

6.11 File Management

6.11.1 Client Database

6.11.1.1 The Contractor will be responsible for maintaining a client file and data store for referral, career transition services delivered, CTS/ETB Plan, if applicable, progress notes, training programs and funding sources for training. Regular updates to the client record as client progresses through their CTS/ ETB Plan and will ensure that current client reports are available as required.

6.11.1.2 The database identifies eligible clients and status (active versus inactive versus deceased versus closed), eligibility information (client type and associated dates), Progress Notes pertaining to a client's participation in the CTS program and the ETB, if applicable. The Contractor's system must include functionality that will enable the tracking of client activity. These functions will support VAC Program delivery where required. The system must be capable of producing activity reports and bring forward notifications on various client files. There will be a requirement for VAC to be notified should circumstances arise which jeopardize the client's participation in CTS/ETB. These notifications must be available through an electronic transfer of data to VAC.

The Contractor's system must be able to capture data as outlined in Annex B that will provide the necessary updates to VAC on the status and profile of program clients. Certain elements must be able to be captured such that they can be:

- a) Viewed in a readable report, e.g. CTS/ETB Plan, that capture all the details of the Plan; and
- b) Used to determine a schedule and amount of distribution of payment by VAC.

6.11.1.3 VAC will transmit client data and eligibility information upon initial referral and upon changes in biographical data or eligibility status for CTS/ETB. Upon receipt of this information, the responsibility is with the Contractor to ensure this information is securely distributed to appropriate staff within their own organization.

6.11.1.4 For eligible CAF members and Veterans, their client type may change over time, based on military service and/or release status. The Contractor must ensure that they obtain and retain the necessary supporting documentation from the client that supports the client type.

6.11.2 Inquiry Function

Authorized VAC personnel may contact the Contractor with a client inquiry and the expectation is that the Contractor would access their system and provide a response. Therefore, the Contractor's system which stores the data described in above functions must be available and maintained regularly. Inquiries from authorized VAC personnel may also include ad hoc requests for reports on specific clients or roll-up reports on specific data elements.

6.12 Information Management

6.12.1 Records Management

The Contractor must ensure that any and all records created in any form as the result of the Contract, regardless of the medium and the physical characteristics, remain the property of VAC and that the records are not used, disclosed or disposed of without prior written authorization from the VAC Contract Manager. The Contractor must further ensure it will only collect the information that is directly required for the purpose of the Contract and that this information will not be used for any other purpose than to perform the work.

6.12.1.2 The Contractor must maintain a records storage space approved by the VAC Contract Manager. The Contractor must store all records in a manner consistent with standards as established by Library and Archives Canada. Information and supporting documentation can be found at the following Web site:
<http://www.collectionscanada.ca>

6.12.1.3 The VAC Contract Manager will set retention periods for all types of information in any

form collected, created or held by the Contractor for both client and program information. The retention periods for this information must be met using the Disposition Authority (20174-002), Library and Archives Canada. When retention periods have expired, the Contractor will seek written permission from the VAC Contract Manager to dispose of the records and, if granted, the Contractor will dispose of the information in accordance with GoC standards concerning the disposal of Protected "B" information. Upon approval, all data must be disposed of using GoC approved methodology. Information, documentation, and records must not be sold, donated, auctioned, or discarded.

6.12.1.4 The minimum retention period for GoC financial records is seven fiscal years (i.e., current fiscal year plus previous six years) as laid out in the Disposition Authority (2017-002), Library and Archives Canada. The Contractor must make provision for the storage of up to seven years of their financial records.

6.12.1.5 The Contractor must retain all electronic and non-electronic information, unless otherwise specified by the VAC Contract Manager at the Contractor's expense and in a format acceptable to the VAC Contract Manager. VAC has the right to access all relevant paper based and electronic records relative to its clients pertaining to CTS/ETB provided by the Contractor. No paper documents shall be destroyed until permission is received from VAC.

6.12.1.6 Documents and records must be labelled, filed, and stored in a logical and organized manner, using the client identification number, which will enable proper disposition or an effective and efficient transfer of documents back to VAC, upon completion of the contract. All hard copy material must be filed in boxes, inventoried, and clearly labelled to facilitate transfer and integration back to the Department's holdings.

6.12.1.7 The Contractor must store all information for the purposes of the contract independent from all other databases. The Contractor must store all paper records for the purposes of the Contract in a segregated area.

6.12.1.8 All work under this contract, including any electronic data back up and storage, must be performed in Canada.

6.12.2 Trans Border Data Flows and Storage of Information

6.12.2.1 As the Contractor is responsible for the collection of sensitive personal information of clients, the Contractor must take all steps to ensure that the client's privacy is protected against any possible risks related to the issue of trans-border flow of information in accordance with the laws of Canada. Such protection can only be satisfactorily achieved if all databases are located in Canada where compliance with Canadian privacy laws can be assured. The Contractor must not engage in any such activities where personal information of VAC clients may be compromised by foreign laws.

6.12.2.2 The Contractor must manage information and electronic data to meet Canada's operational requirements and must ensure that:

1. All aspects of data processing is conducted and only accessible in Canada;
2. Database(s) is located and only accessible in Canada;
3. Database(s) is physically independent from all other databases, directly or indirectly, which are located outside of Canada;

4. All data centres, call centres, centres of operations and records and information storage (electronic and hard copy data and information) as well as any backup locations are located in Canada and a backup plan is in place;
5. The remote access to data and data systems be restricted to individuals or entities who have obtained prior approval in writing by VAC to do so;
6. Data in transit is appropriately encrypted in accordance with the requirements outlined in the TBS Management of Information Technology Security Standard <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12328§ion=text>; and
7. Certification for Protection of Personal Information is provided.

6.12.3 Management of Electronic Records

6.12.3.1 The Contractor must use an electronic records database that can be used for records received, created, used or held by the Contractor to manage their information. The Contractor must use a certified electronic document/records management system which will protect essential records and preserve information. The Contractor must state the system which will manage these records and the certification and standards which it meets.

6.12.3.2 The Contractor must have the capacity to convert all paper copy records to electronic records in accordance with the technical specifications for imaging listed in Annex F. Paper copy records that have been converted to electronic records cannot be destroyed until such time as a digitization standard has been put in place by VAC and written permission from the VAC Contract Manager to destroy paper copy records has been granted. The Contractor will be required to store paper copy records as set out in section 6 until such time as a digitization standard has been put in place by VAC.

6.12.4 Metadata

The Contractor must include records management metadata about each electronic record it collects, creates or holds during the performance of the Work, regardless of format, in accordance with the TBS Standard on Metadata that can be found at: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=18909§ion=text>

6.13 Access to Information and Privacy (ATIP)

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

6.13.1 Collection of Personal Information

6.13.1.1 In accordance with section 4 of the *Privacy Act*, VAC (or the Contractor) must not collect personal information unless it relates directly to an operating program or activity.

6.13.1.2 Collection of personal information about clients by the Contractor for the provision of the work must be authorized in VAC legislation and:

- Be collected directly from the client with the client's express consent, (consent is not required if collected directly from the client and the client has been provided a privacy notice statement); or
- Be transferred from VAC; or

- If information is collected from a third party, it must be collected with the client's consent (consent form to be used will be provided after contract award).

6.13.1.3 The Contractor must have administrative controls in place and participate in mandatory privacy training so that the collection of personal information is limited to what is necessary for the related programs or activities and be able to demonstrate the need for each piece of personal information collected.

6.13.1.4 The Contractor must work with VAC during the implementation period of the Contract in order to collect the personal information elements outlined in section 6.5.6.3 of the SOW.

6.13.1.5 The Contractor must obtain the approval of VAC for any forms used in administering the services related to this SOW. A privacy notice statement is required on all forms that will be used when collecting personal information from clients. The privacy notice statements must include the following elements:

- The purpose and authority for the collection of personal information for VAC's program or activity;
- Any uses or disclosures that are consistent with the original purpose;
- Any legal or administrative consequences for refusing to provide the personal information;
- The right of access to, correction of and protection of personal information under the *Privacy Act*;
- Reference to the applicable Personal Information Bank described in the *Info Source*;
- Reference to voluntary or mandatory participation along with consequences; and
- The right to complain to the Office of the Privacy Commissioner with respect to the contact information.

6.13.1.6 The Contractor's employees must effectively identify themselves to the clients from whom they are collecting personal information and provide clients with a means to verify that they are actually working on behalf of the government and authorized to collect the information.

6.13.2 Accuracy of Personal Information

The Contractor must make every reasonable effort to ensure the accuracy and completeness of any personal information to be used in a decision-making process that will directly affect the individual to whom the information relates.

6.13.3 Correction of Personal Information

The Contractor must annotate or correct the information in accordance with the *Privacy Act* within 10 business days of receiving a written direction from VAC to correct or annotate any personal information relating to their clients.

6.13.4 Use of Personal Information

6.13.4.1 The Contractor must, unless otherwise directed in writing, use all personal information of clients for the purpose(s) for which the information was collected and for uses consistent with that purpose.

6.13.4.2 Any other uses of personal information not identified within the contract must be approved by the VAC Contract Manager in consultation with ATIP.

6.13.5 Disclosure of Personal Information

Personal Information of clients under the control of VAC (whether in the possession of the Contractor or VAC) must not be disclosed or transferred to a third party, without the prior written permission of the client.

6.13.6 Requests for Information

6.13.6.1 Should the Contractor receive a request for information, personal or otherwise, collected, used or disclosed for the purposes of the contract, the Contractor must follow business processes that will be provided by VAC.

6.13.6.2 The Contractor must apply the Standard Operating Procedures developed during the Implementation Phase with regard to requests for personal information.

6.13.7 Audit and Inspection of Records or Personal Information

6.13.7.1 The GoC may, at any time and upon reasonable notice to the Contractor, enter the Contractor's facilities to inspect, audit, or require a third party to audit the Contractor's compliance with the privacy, security, and information management requirements under the contract and that the Contractor must co-operate with any such audit or inspection.

6.13.7.2 The Contractor must maintain specific information to enable the conduct of information audits, including inspection of:

- Any personal information in the possession of the Contractor;
- Any of the Contractor's information management policies;
- Practices relevant to its management of personal information; and
- Non-compliance with the contract.

6.13.8 Notification of Breach

6.13.8.1 The Contractor must immediately notify the VAC Contract Manager, in writing, of any non-compliance with the privacy provisions of the contract in any respect.

6.13.8.2 The Contractor must immediately notify the VAC Contract Manager, in writing, when it becomes aware of a potential breach of privacy. This includes but is not limited to:

- Unauthorized collection of the personal information in its custody;
- 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 that may be used to access personal information.

6.13.8.3 The Contractor and VAC must work to achieve resolution and compliance with GoC privacy requirements.

6.13.8.4 The Contractor must follow the Standard Operating Procedures developed during the contract implementation phase.

6.13.8.5 The Contractor will be required to indemnify the government for any liability in connection with any breach of its obligations under the contract.

6.13.9 Privacy Impact Assessment

6.13.9.1 VAC is required to develop a comprehensive Privacy Impact Assessment (PIA) in support of program changes. The Contractor, if requested, must provide any information necessary for the completion or updating of this PIA which includes but is not limited to:

- Business process descriptions, business process diagrams, data/information flow diagrams, data/information flow tables, segregation and security documentation, systems diagrams/specification (any system where personal information involved in this contract will be collected, used, stored or retained), and an overview of organizational structure. The VAC Contract Manager may request the information and/or records at any time from the Contractor. This includes any records that are transferred to the Contractor, or collected, created, obtained or maintained by the Contractor in fulfilment of the responsibilities stated elsewhere in the Contract.
- Providing access to its facilities and all documentation and resources associated with the contract, and will provide the VAC Contract Manager (or their designate) access to desk space, telephones and computers to conduct the assessment.

6.13.9.2 The Contractor must work with the VAC Contract Manager to address any deficiencies or recommendations as a result of the PIA.

6.13.9.3 The Contractor must, upon completion of a PIA, develop and implement a Corrective Action Plan, approved by VAC. This plan must include a schedule for implementation of corrective actions, to correct deficiencies identified within the PIA.

6.13.9.4 Provision of information by the Contractor to VAC in support of the PIA will be at the Contractor's own expense.

6.14 Security

6.14.1 Identification and Authentication Management:

The Contractor will implement measures to ensure that individuals and devices are uniquely identified and authenticated to an appropriate level of assurance before being granted access to information and resources within information systems. This will be done in accordance with the Standard on Identity and Credential Assurance.

<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=26776>

6.14.2 Access Management:

The Contractor will implement measures to ensure that access to information (in electronic form) and information systems is limited to authorized users who have been security-screened at the appropriate level and who have a need for access, including:

- Establishing approval, notification, monitoring and operational requirements and procedures related to the creation, activation, modification, periodic review, and disabling or deletion of information system accounts;

- Defining access privileges based on requirements and the principles of least privilege, minimum access, and segregation of duties;
- Informing authorized users of expectations for acceptable use of information systems, of monitoring practices being applied, and of the consequences for unacceptable use of those systems;
- Establishing measures to control the use of accounts that have administrative privileges, including restricting the number of users that have administrative privileges; and limiting the information systems, networks and applications that can be accessed, and the operations that can be performed using privileged accounts;
- Verifying that individuals who are authorized to conduct privileged operations, such as setting or changing access privileges and implementing or maintaining other IT security controls, are not permitted to alter records of these operations and have been security-screened commensurate with their access level; and
- Reviewing access privileges periodically and removing access when no longer required, e.g., upon an employee's departure or change of responsibilities.

6.14.3 IT Configuration Management Security

The Contractor must manage the configuration of information systems and IT environments to maintain known and approved system and component designs, settings, parameters and attributes, including:

- Ensuring that change management practices include consideration of security impacts that may result from proposed changes;
- Designing and configuring information systems to provide only required capabilities and to specifically prohibit, disable or restrict the use of unnecessary functions, ports, protocols and services;
- Establishing measures to ensure that only authorized applications and application components are installed and executed on information systems and their components;
- Establishing measures to ensure that only authorized hardware and devices are connected to, or have access to, information systems and their components; and
- Establishing and maintaining documentation for IT systems that contains at least:
 - Configuration, installation, and operation of the system,
 - Required maintenance of functions / mechanisms,
 - Known vulnerabilities,
 - User-accessible functions / methods of user interaction,
 - Information system components, and,
 - Inter-Connections (including diagrams).

6.14.4 Secure Data Storage Management

The Contractor must implement measures to protect information on electronic media and electronic storage devices at rest (e.g., in storage), in transit (e.g., transport and transmittal), and through appropriate sanitization or destruction before reuse or disposal of the equipment, in accordance with the sensitivity of the information and departmental practices, including:

- Identifying secure electronic storage, transportation, transmittal, sanitization and destruction devices, methods and services that are authorized for use with GoC information, including but not limited to portable storage devices;
- Implementing appropriate safeguards where other devices, methods or services need to be used for operational purposes, with approval by an individual who has the required authority; and

- Sanitizing electronic storage systems in accordance with CSEC and RCMP approved methods (<https://www.cse-cst.gc.ca/en/node/270/html/10572>). Once sanitized, and appropriate attestation is to be completed. This should include:
 - Serial number, make, and model of the item,
 - If the item is for re-use,
 - Method of sanitization / destruction, including product used; and
 - Name, title, and signature of the individual performing the operation.

Note: Electronic storage can also be shipped to the Department for sanitization.

6.14.5 Physical and Environmental Protection

The Contractor must implement measures to protect information systems, IT environments and their components. This includes the information they process from physical and environmental threats, including using emanations security or other measures as required to protect information systems from information leakage due to electromagnetic signals emanations.

6.14.6 System and Communications Protection

The Contractor must implement measures to protect information systems, IT environments and their components, as well as the information they process, from internal and external network-based threats, such as threats related to use of public networks and remote access, including:

- Defining and establishing security zones to maintain appropriate separation within physical and virtual IT environments, and ensure that information systems (including virtual instances) that reside in these environments are provided with consistent protection levels that are commensurate with the threat type and level, the sensitivity of the information, and other relevant security considerations, such as criticality of services and activities supported by the information system;
(<https://www.cse-cst.gc.ca/en/node/268/html/15236>)
(<https://www.cse-cst.gc.ca/en/node/266/html/27445>)
- Controlling the number of discrete external connections to networks to the minimum necessary to meet the requirements; and
- Using encryption or other measures to protect the confidentiality of sensitive data transmitted across public networks or any other network where the data may be at risk of unauthorized access. (<https://www.cse-cst.gc.ca/en/node/1831/html/26515>)

6.14.7 System and Information Integrity Management

The Contractor must implement measures to protect information systems and IT environments, their components, and the information they process against attacks that leverage vulnerabilities in information systems and IT environments to affect their integrity, and that could also have an impact on their availability or confidentiality, e.g., malicious code. This includes:

- Coordinating processes for managing vulnerabilities in information systems and IT environments; and
- Using, reviewing and regularly updating measures to prevent, detect and eliminate malicious code, e.g., viruses in information systems, IT environments and their components.

6.14.8 Information System Audit Management

6.14.8.1 The Contractor must create, protect and retain information system audit logs and records to enable monitoring, reporting, analysis, investigation and implementation of corrective actions, as required for each system and in accordance with departmental practices, including implementing measures to enable user activities to be uniquely and authoritatively traced to ensure user accountability for their activities.

6.14.8.2 Reports on users' access to client information may be requested at any time. The report must provide the users identification as well as date and time when the client data was accessed.

6.14.9 IT Project Management Security

The Contractor must integrate security considerations into all stages of IT project management to ensure that the security needs of programs and services are considered and addressed when developing information systems and IT environments.

6.14.10 Security - Information System Life Cycle and IT Supply Chain Integrity

The Contractor must identify and address security requirements, activities and gating requirements throughout all stages of information system and IT environment life cycles, including definition, design, development and procurement, operations, maintenance, and decommissioning, including:

- Ensuring all data is stored within Canada;
- Establishing documented arrangements that ensure all entities follow these requirements (For information systems or IT environments managed for or by another organization / company or shared by two or more organizations / companies); and
- Ensuring the Contractor, and any sub-contractor(s) facilities / systems are approved by the Canadian Industrial Security Program.

6.14.11 Monitoring and Corrective Actions

The Contractor must maintain an effective IT security posture by monitoring threats and vulnerabilities; analyze information system audit logs and records; review the results of security assessments, tests and post-event analysis; and take pre-emptive, reactive and corrective actions to ensure that IT security practices and controls continue to meet the needs of the department.

6.15 User Support

The Contractor will provide support to address and resolve system and technical issues that arise. The Contractor's support will include but is not limited to

- Diagnose, troubleshoot, analyze and prioritize incidents
- Respond to and address all incidents
- Communicate directly with end-users
- Assist VAC in replicating incidents
- Resolve CTS/ETB platform related incidents
- Advise the CTS/ETB user community of CTS/ETB related issues such as connectivity and performance affecting the common platform
- Advise the CTS/ETB user community of scheduled maintenance and unscheduled maintenance activities

- Troubleshoot technical issues relating to the CTS/ETB platform or environments
- Provide information to the VAC technical department as needed
- Provide updates on solution timelines to both VAC and the CTS/ETB clients

6.15.1 Client User Support

- a) The Contractor must update the CTS/ETB system homepage to notify users of system issues within four (4) hours of system issue notification.
- b) The Contractor must provide a Cross-Domain Automatic Sign-on with My VAC Account (MVA) six months after contract implementation (SOW 6.5.3).
 - 1) The Contractor will be responsible for all log on issues pertaining to passwords and access until the Automatic Sign-on is enabled
 - 2) After Automatic Sign-on is enabled, access to CTS/ETB will be primarily directed through the MVA portal, and access issues relating to passwords will be the responsibility of VAC, however any issues with the link to CTS/ETB from within the MVA portal will be the responsibility of the CTS/ETB Contractor.

Contractor User Support to Veterans Affairs Canada

- a) If a significant system issue arises, such as but not limited to: an issue with data transfer between the Contractor and VAC, or issues with the link to CTS/ETB within MVA the Contractor and VAC must communicate immediately to ensure the Contractor is aware of a system issue. The Contractor must provide an update to the IT department of VAC within 1 hour of system issue notification. The Contractor must provide an update every four (4) hours until system resolution is identified.
- b) VAC will provide updates to communication to the National Contact Center Network (NCCN), affected business units, and provide updates on the MVCA client portal regarding system outages and the estimated time of repair.
- c) The Contractor will:
 - Respond to VAC within 24 hours that the issue has been logged; and
 - Provide an action plan within five business days.

7.0 CONTRACT PHASE-OUT REQUIREMENTS

7.1 Contract Phase-Out Plan

7.1.1 The Contractor must undertake activities to ensure the smooth, efficient and complete transition to a new arrangement for CTS /ETB Operations without interruption of service delivery to VAC and/or clients. It is anticipated that six months may be required for the Contract Phase-Out.

7.1.2 The Contractor must submit a comprehensive plan (Contract Phase-Out Plan) within 20 business days of notification of commencement of the Contract Phase-out period. The Contract Phase-Out Plan must be approved by the VAC Contract Manager and must ensure the efficient, complete and secure:

- Transitioning of services to VAC or its delegated third party (e.g., a new CTS/ETB service provider); and
- Transitioning of CTS/ETB information to the VAC (including the information contained within Contractor databases, paper files and any documentation relating to clients).

7.1.3 The Contractor must undertake all obligations contained within the Contract Phase-Out Plan, in accordance with the Contract Phase-Out schedule approved by the VAC Contract Manager in addition to the following:

- During the Contract Phase-Out period, the Contractor must provide transfer of knowledge to VAC, in accordance with the schedule, and the method to be used as outlined in the Contract Phase-Out Plan, as accepted by the VAC Contract Manager. The Contractor must respond to queries regarding Contract Phase-Out activities and any in progress work to ensure a smooth transition with the new supplier and to ensure uninterrupted CTS/ETB Services delivery to Clients.
- During the Contract Phase-Out period, the Contractor must be responsible for maintaining Operations as per the Contract, and the completion of any in progress work, in accordance with the Contract Phase-Out Plan.
- The VAC Contract Manager will be responsible for verifying the completion of all contractual requirements and for reviewing all data and documentation returned/transferred by the Contractor. The VAC Contract Manager will also advise the Contractor of where and when data and documentation is to be returned and/or transferred.

7.2 Data Conversion

7.2.1 As part of contract phase-out, the Contractor must convert and load up to a maximum of three years of data as specified by VAC from the CTS/ETB system into the new Contractor's CTS/ETB system. The Contractor must also transfer archived files. Data will be received through the VAC Contract Manager from the incumbent Contractor. VAC would facilitate the transfer of data whether VAC receives the data and passes it to the new Contractor or makes an alternate arrangement to transfer it between Contractors. This will be decided at the awarding of the subsequent contract.

7.2.2 For data conversion the data extract file must be in XML format and the Contractor must:

- Provide a Conversion Strategy and Plan.

- Provide a conversion methodology and system process(es) to convert all required data from the previous CTS/ETB into the Contractor's CTS/ETB system.
- Convert and load the data, validate that the data is fully and accurately converted and that continuity of data is maintained.
- Perform quality assurance and a report of records rejected by the conversion process(es).
- Ensure that the privacy and security of the information is maintained throughout the data conversion and loading exercise.
- Store client data by the primary identification number, data may be stored in an existing system by another unique identifier but must be identified for the purposes of interchange with VAC systems.
- Perform separate reconciliations of active and inactive converted client records against the same records in the VAC's source systems of record.
- Ensure that the edits are current as of implementation date.

7.2.3 For the transfer of non-electronic files, the Contractor must:

- Prepare and transfer paper-based files and forms processed by the Contractor to VAC for archival storage by the contract close-out date.
- Information will be organized in accordance with direction to be provided by VAC in preparation for contract close-out. These requirements will include, but are not limited to, ensuring that information is listed by client name and identifier, so that it is retrievable by VAC as required.

7.2.4 Remaining data transfer at close-out:

- Remaining data must be transferred to VAC in a form acceptable to VAC for archival storage.

ANNEX A - VOLUMETRICS

Liability of Canada for Accuracy of Volume Estimates Provided

Canada accepts no liability for any variation or discrepancy in the estimated volumes that have been provided in the RFP, elsewhere in the documents or under the Contract and the actual usage/volume figures processed under the contract.

Further, the Contractor hereby waives any action or claim that it might have against Canada arising from any variation or discrepancy between the estimates of resource requirements, decisions and/or claims provided by Canada and the actual numbers processed under the contract.

Volume

Anticipated Volume of Clients in Career Transition Services

	2018-2019	2019-2020	2020-2021	2021-2022
General Counselling and Planning	1018	1030	1030	1030
One-on-one Career counselling (Veterans)	664	1104	1391	1579
One-on-one Career counselling (Spouses)	178	345	349	323
Job Finding Assistance (including Job Placement, when applicable.	128	213	268	304

ANNEX B – DATA/INFORMATION CAPTURE

Final specifications/details for the contents of these documents will be determined during implementation. Deliverables must be captured and viewable in report format for the client.

INTAKE ASSESSMENT

- Baseline information such as:
 - Employment status at time of intake
 - Employed CAF
 - Employed civilian work force
 - Looking for work
 - Not in the labour force
 - Participating in other meaningful activity
 - Retired
 - Current education level
 - Some high school
 - High school diploma
 - College
 - Bachelor Degree
 - Post graduate
 - Objective of the education and training, if applicable
 - Personal development
 - Increased employment opportunities
 - Maintain current employment
 - Training and Skills Summary
 - Occupational goal (type and category)
 - Additional Comments (special skills/interests, strengths, history of learning disabilities, accommodation needs)

CAREER TRANSITION SERVICES (CTS) PLAN

- Identify if the focus of the Plan is career exploration or career transition.
- Career Exploration Focus (CAF Members Only)
 - Intent of accessing CTS
 - Services to be accessed/target dates
 - Record of individual progress against the Plan including achievement dates
 - Plan status, i.e., progressing on target, progress is delayed, services suspended
 - Plan update required including the date a needed update was identified
 - Overall anticipated duration of the Plan
 - Closure date
- Career Transition Focus
 - Occupational goal (NOC, if applicable)
 - Level of service by client type
 - Steps that will be necessary for the client to complete in order to make the transition to the civilian labour force and/or achieve their career goals/aspirations;
 - Method of service delivery
 - Provider of those services
 - Associated time frames/target dates

- Record of individual progress against the Plan including achievement dates
- Plan status, i.e., progressing on target, progress is delayed, services suspended
- Plan update required including the date a needed update was identified
- Overall anticipated duration of the Plan
- Closure date

EDUCATION AND TRAINING BENEFIT (ETB) PLAN

- Proof of enrollment/acceptance
- Educational institution/Company offering the course
- Educational program/course name
- Objective of the education, training or course:
 - Personal development
 - Increased employment opportunities
 - Employment maintenance
- Credentials to be obtained, if any
- Identification of key goals/target dates:
 - Specific number of course(s) to be taken per term
- Timelines:
 - Semester start date
 - Semester end date
 - Program start date
 - Program end date
 - Course start date
 - Course end date
- Associated costs:
 - Annual tuition cost/course cost
- Plan update required including the date a needed update was identified
- Overall anticipated duration of the Plan
- Closure date (based on information provided by the client)

CLOSURE REPORT

- List of services accessed by the individual clients
- Plan completion status
- Reason for not completing the Plan (if applicable)
- Identification of the specific issue(s)/concern(s)
- Outcomes achieved
- NOC code for occupational goal, if applicable
- Service duration (eligibility to closure)
- Closure status:
 - Employed
 - Looking for work
 - Not in the labour force
 - Participating in ETB
 - Participating in a training program (not through ETB)
 - Participating in other meaningful activity
 - Client Withdrew
 - VAC termination/suspension

ANNEX C - REFERENCE DOCUMENTS

The following documents provide guidance for the provision of CTS/ETB. The Contractor must conform to and maintain working knowledge of the GoC requirements, including, but not limited to, all amendments thereto, any superseding instruments, and any subsequent requirements (i.e. regulations, directives, standards):

1. *Financial Administration Act*:
<http://laws-lois.justice.gc.ca/eng/acts/f-11/>
2. *Access to Information Act*:
<http://laws-lois.justice.gc.ca/eng/acts/A-1/>
3. *Official Languages Act*:
<http://laws-lois.justice.gc.ca/eng/acts/o-3.09991/FullText.html>
4. *Privacy Act*:
<http://laws-lois.justice.gc.ca/eng/acts/p-21/>
5. Policy on Privacy Protection
<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12510>
6. *Personal Information Protection and Electronic Documents Act*:
<http://laws-lois.justice.gc.ca/eng/acts/P-8.6/>
7. Ten Privacy Principles
https://www.priv.gc.ca/en/privacy-topics/privacy-laws-in-canada/the-personal-information-protection-and-electronic-documents-act-pipeda/p_principle/
8. Policy on Communications and Federal Identity of the Government of Canada:
<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=30683> and
<https://www.canada.ca/en/treasury-board-secretariat/services/government-communications/federal-identity-program.html>.
9. Policy on Acceptable Network and Device Use:
<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=27122>
10. Canada.ca Content Style Guide:
<https://www.canada.ca/en/treasury-board-secretariat/services/government-communications/canada-content-style-guide.html>
11. Standard on Web Accessibility:
<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=23601>
12. Optimizing Website for Mobile
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=27088>
13. Website Experience Toolkit

- <https://www.canada.ca/en/treasury-board-secretariat/services/government-communications/web-experience-toolkit.html>
14. Enhanced Management Framework:
<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=13765>
 15. Policy on Access to Information:
<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12453>
 16. Policy on Management of Information Technology:
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12755>
 17. Policy on Information Management:
<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12742>
 18. Policy on Government Security:
<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=16578>
 19. Operational Security Standard: Management of Information Technology Security:
<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12328>
 20. Operational Security Standard: Business Continuity Planning Program:
<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12324§ion=HTML>
 21. Disaster recovery
<https://www.publicsafety.gc.ca>
 22. Operational Security Standard on Physical Security:
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12329>
 23. Standard on Security Screening:
<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=28115>
 24. Security and Contracting Management Standard:
<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12332>
 25. Security Organization and Administration Standard:
<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12333>
 26. *Library and Archives of Canada Act*:
<http://laws-lois.justice.gc.ca/eng/acts/L-7.7/>
 27. Directive on Privacy Impact Assessment:
<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=18308>
 28. Baseline Security Requirements for Network Security Zones:
<https://www.cse-cst.gc.ca/en/publication/itsg-22>
 29. *Canadian Forces Members and Veterans Re-establishment and Compensation Act*:
<http://laws-lois.justice.gc.ca/eng/acts/C-16.8/>

30. Mandatory Procedures for Social Media and Web Communications
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=30682#appD>
31. Procedures for Publishing
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=27167>
32. Mandatory Procedures for Advertising
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=30682§ion=procedure&p=B>
33. Mandatory Procedures for Public Opinion Research
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=30682§ion=procedure&p=C>
34. Regulations
To be added once approved
35. Guidance on Securely Configuring Network Protocols
<https://www.cse-cst.gc.ca/en/node/1830/html/26507>
36. User Authentication Guidance for Information Technology Systems
<https://www.cse-cst.gc.ca/en/node/1842/html/26717>
37. Industrial Security Manual
<http://iss-ssi.pwgsc-tpsgc.gc.ca/msi-ism/index-eng.html>
38. Directive on Record Keeping
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=16552>
39. Library and Archive Canada
<http://www.collectionscanada.ca/>
40. Standard on Metadata
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=18909>
41. Standard on Identity and Credential Assurance
<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=26776>
42. Clearing and Declassifying Electronic Data Storage Devices
<https://www.cse-cst.gc.ca/en/node/270/html/10572>
43. Network Security Zoning - Design Considerations for Placement of Services within Zones
<https://www.cse-cst.gc.ca/en/node/266/html/27445>
44. Cryptographic Algorithms for UNCLASSIFIED, PROTECTED A, and PROTECTED B Information
<https://www.cse-cst.gc.ca/en/node/1831/html/26515>

ANNEX D – GLOSSARY OF TERMS AND DEFINITIONS

CAF – Canadian Armed Forces

CTS – Career Transition Services

DSO – Departmental Security Officer

ETB – Education and Training Benefit

MET – Military Employment Transition - The Canada Company Military Employment Transition Program is an initiative developed to assist CAF Members, Reservists, Veterans and Military spouses who are seeking to find jobs in the civilian workforce. The program serves as a bridge between CAF and Canada Company's "Military Friendly Employer Partners".

ESDC – Employment and Social Development Canada

PIA - Privacy Impact Assessment, a document which defines the risks and impacts relating to the utilization of an individual's personal information by government departments

PSO - Personnel Selection Officer - an officer of the Personnel Selection Branch of DND who commands the Base/Wing organization whose responsibilities include the coordination of all CAF programs which support second career preparations.

PSPC - Public Services and Procurement Canada: the main purchasing arm of the GoC.

Regular Force - That element of the CAF whose members serve on a full-time basis.

Reservist - A member of the Reserve Force. Reservists generally serve on a part-time basis, but sometimes serve full-time for a designated period.

Suitable employment (for CTS) - that which is realistic in light of each individual's aspirations, qualifications, experience, education and intended geographic area of residence. It is not tied to a proportion of pre-release salary and may include only part-time or seasonal employment as well as contractual employment of a duration of six months or more.

Survivors - Spouses or common-law partners of deceased CAF members or Veterans.

TRA - Treat and Risk Assessment

VAC - Veterans Affairs Canada

Veteran - A former member of the CAF who successfully underwent basic training and was honourably released.

SOW – Statement of Work

GoC – Government of Canada

CFIS – Canadian Forces Income Support

BCP - Business Continuity Plan

DR - Disaster Recovery

ANNEX E - SERVICE LEVEL AGREEMENT INFORMATION

CTS/ETB System Availability Service Level Measurement Audit

- a. A System Availability service level measurement audit must be conducted on a monthly basis, at VAC's sole discretion.
 - i. The System Availability service level measurement audit will be conducted at the Request level. For the purposes of the service level measurement audit, a Request is defined as each query and/or action to the CTS/ETB System, from the point at which it enters the Contractor's network and/or systems to the point it exits at the same boundary.
- b. All requests within a single month, excluding those issued within maintenance window hours, will be equally eligible for testing in the service level measurement audit. The performance must be measured on a monthly basis.

1. System Availability Incident Reporting:

Reference - SOW 6.5. The Contractor must report CTS/ETB system availability incidents to the VAC Contract Manager. The priority with which Incidents are responded to is initially determined in response to the impact and urgency of the issue. The impact is defined as the measure of the business criticality of an incident or problem, and the urgency is the necessary speed of responding.

Incidents are assigned a priority of critical, high, medium, low or planning. The guidelines for each are defined as follows:

PRIORITY CODE/LEVEL	DESCRIPTION
1. CRITICAL	Causing loss of service or severe usability problems to a larger number of users of the system, or some equally serious problem. Immediate action required. Emergency meetings may need to be convened. Resources may need to be allocated immediately to deploy such authorized changes
2. HIGH	Severely affecting some users, or impacting a large number of users
3. MEDIUM	No severe impact, but rectification cannot be deferred until the next scheduled release or upgrade To be allocated medium priority for resources
4. LOW	A need or change is justified and necessary, but can wait until the next scheduled release or upgrade. To be allocated resources accordingly
5. PLANNING	An operating improvement that would enhance work functions and/or reduce workarounds and also affects a smaller number of system users. It does not reduce client service. Resources to be allocated accordingly. Normally this type of change is a new requirement or adds functions that were not required at the time of implementation

2. System Incident Reporting Service Level Measurement Audit

- a. A System Incident service level measurement audit must be conducted on a monthly basis, at VAC's sole discretion.
 - b. The System Incident service level measurement audit will be conducted at the Notification level. For the purposes of the service level measurement audit, a Notification is defined as each Incident identified. Where the Contractor has provided batch notification (i.e. multiple incidents reported in a single notification), each incident within the batch notification will be equally eligible for selection in VAC's service level measurement audit.
 - c. All Notifications (provided by the Contractor and subject to verification by the VAC Contract Manager must provide clear identification of the Incident by Type, First Notification, Update time(s); and Resolution Time(s).
 - d. Each Incident within a single month will be equally eligible for testing in the System Incident service level measurement audit.
 - e. A random sampling method will be used to select Incidents for testing in the service level measurement audit. All Notifications received within a single month will be equally eligible for selection. The overall service level measurement audit sample size will be dependent upon the total number of Notifications received during the previous month. A random sample consisting of a sufficient number of notifications to allow for a 95% confidence level will be drawn.
3. System Access Controls: The Contractor must provide role based and unique user and administrator access controls.

Related Requirements and Information

- a. To maintain accountability as custodian of the data and to be able to trace any security or privacy breach or suspected breach to a single specific user, every user must be issued a unique User ID, password even if multiple individuals have common roles. User ID's, passwords must not be shared
- b. The Contractor must maintain a systems audit trail for each user granted access and failed attempts to access the system under these terms to ensure accountability on the part of the administrators and users of this and all supporting systems.
- c. Access controls must be developed to enforce usage and reporting of information on a need-to-know and least privilege basis, as well as separation of duties and supervisory review, as determined by the VAC Contract Manager.
- d. The Contractor must provide a system to manage user access and profiles and maintain and document the system at all times as users and/or access levels change or are updated. Any change to a user account must be accompanied by an audit record indicating the changes that were applied, which user account made the change and on what date and time. View only user access to client records and information must create a corresponding audit record.
- e. The Contractor must be responsible for ensuring Contractor user access and controls are kept current with all changes or updates to Contractor staff. The Contractor must apply changes to user access profiles within 1 business day of receipt of information.
- f. The system must have the ability to provide "super-user" access to a very limited number of designated VAC users to access applications and data for operational, financial and technical purposes.
- g. The role-based access controls must be applied to all systems used for CTS/ETB services.

The Contractor must document the access controls. The Contractor must be responsible for developing a Static CTS/ETB Operation report that lists all active and inactive user accounts and the various roles assigned to them. This report must be created monthly, within 5 business days of month end, and made available electronically to authorized VAC staff.

ANNEX F – DIGITIZATION RECOMMENDATIONS

The following recommendations on digitization specifications and quality apply to textual information resources of business value (IRBVs). For **information resources of enduring value (IREVs)**, LAC recommends, at minimum, scanning at 300 ppi (1:1 ratio).

Category				
Textual and illustrated printed matter (book, journals, manuscripts, some maps). Visual-arts elements of limited significance and generally consisting of printed halftones, line art, explanatory tables and drawing, and the like.				
Object or Material	Scanned resolution	Size	Bit Depth	Further Recommendations
<p>Clean, high-contrast documents or book pages with clearly legible type, e.g., evenly printed typeset or laser printed pages without background discolouration. Illustrations limited to monochromatic (one colour) line art. Informational and artifactual value.</p> <p>For example: Printed documents (reports, forms), books (published material), oversized textual materials, legible manuscripts, newspapers.</p>	Between 300 and 600 ppi, depending on operational needs	1:1 Resolution (scan so that the copy will be the same size as the original)	<p>8-bit RGB colour</p> <p>or</p> <p>8-bit greyscale</p> <p>or</p> <p>1-bit b&w</p>	<ul style="list-style-type: none"> 1-bit bitonal mode or 8-bit greyscale - adjust scan resolution to produce a QI of 8 for smallest significant character or 1-bit bitonal mode - 600 ppi for documents with smallest significant character of 1.0 mm or larger (<i>The 600 ppi 1-bit files can be produced via scanning or created/derived from 400 ppi, 8-bit greyscale images</i>) or 8-bit greyscale mode – 400 ppi for documents with smallest significant character of 1.0 mm or larger <p>Alternate</p> <ul style="list-style-type: none"> 1-bit bitonal mode - 300 ppi for documents with smallest significant character of 2.0 mm or larger (<i>The 300 ppi 1-bit files can be produced via scanning or created/derived from 300 ppi, 8-bit greyscale images.</i>) or 8-bit greyscale mode - 300 ppi for documents with smallest significant character of 1.5 mm or larger.

Notes:

PPI can be decreased depending on how the digitized information resources will be used. Generally, 150 ppi is the minimum allowable resolution at which an object remains legible, however **300 ppi is the recommended minimum**.

Greyscale scanning allows for the presence of graphics and other non-textual elements while b&w scanning allows for greater precision when trying to perform Optical Character Recognition (OCR), which allows for full-text searching.

Regardless of approach used, adjust scan resolution to produce a minimum pixel measurement across the long dimension of 6,000 lines for 1-bit files and 4,000 lines for 8-bit files.

Newspapers can either be shot in 8-bit greyscale or RGB depending on importance of contents and intended use. Legibility may be reduced due to small text size if a lesser resolution is used.

Recommended file formats include PDF, PDF/A, JPEG, JP2 and TIFF.

ANNEX “B”

BASIS OF PAYMENT

The Contractor will be paid its costs reasonably and properly incurred in the performance of the work, as detailed below. Applicable taxes are extra.

1.0 Implementation Phase

For the Implementation Period work detailed in section 5.0 of the SOW, the Contractor will be paid firm prices, following delivery and acceptance or performance of the Work as applicable, applicable taxes extra.

1.1 Initial Meeting

The Contractor will be paid an all-inclusive firm price for its costs associated with the Initial Meeting at VAC's offices in Charlottetown, PEI, as described in section 5.1 of the SOW. This fixed price will include the cost for Contractor travel and accommodations.

Firm Price = \$_____

Payment will be made after the initial meeting has been completed.

1.2 IT System

The Contractor will be paid an all-inclusive firm price for the cost associated with the development of a system meeting the requirements as described in section 5.3 of the SOW, including the design and layout of all reports and Data Extract File.

Firm Price = \$_____

Payment will be made upon VAC's acceptance of the Contractor's system and all reports and Data Extract File layouts.

1.3 Travel and Living Expenses – IT System

The Contractor will be paid the travel and living expenses incurred by the Contractor during the Implementation Phase (excluding the Initial Meeting in section 1.1 of this Basis of Payment) to liaise with VAC. The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit or administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the [National Joint Council \(NJC\) Travel Directive](#) and with the other provisions of the directive referring to “travellers”, rather than those referring to “employees”.

All travel must be pre-authorized by VAC.

1.4 Frontend Channel (web-based client internet portal)

The Contractor will be paid an all-inclusive firm price for the cost associated with the development of a frontend channel based on the requirements as described in section 6.5 of the SOW.

Firm Price = \$_____

Payment will be made upon VAC's acceptance of the Contractor's frontend channel

1.5 Website

The Contractor will be paid a firm price for the design, translation, development and implementation of a Website as described in section 5.4.2 of the SOW. This Website will be available in both English and French.

Firm Price = \$_____

Payment will be made upon VAC's acceptance of the Web site.

1.6 Instruction Modules

The Contractor will be paid a firm price for the design, translation, development and implementation of online instruction modules as described in section 6.5.2.4 of the SOW. Instruction modules must be available in both English and French and will be based on industry best practices.

Firm Price = \$_____

Payment will be made upon VAC's acceptance of the instruction modules.

1.7 Training Materials

The Contractor will be paid a firm price for the design, translation and development of training materials to support training of contractor staff as described in section 5.9. Training materials must be available in both English and French.

Firm Price = \$_____

Payment will be made upon VAC's acceptance of the training materials.

1.8 Communications Materials

The Contractor will be paid a firm price for the design, translation and development of communications material as described in section 5.4.1 of the SOW. Communications materials must be available in both English and French and will be based on industry best practices.

Firm Price = \$_____

Payment will be made upon VAC's acceptance of the instruction modules.

2.0 Operations and Maintenance Phase

NOTE: All quantities in this section are for evaluation purposes only.

Contract Year 1

2.1	Career Transition and Education and Training Benefit Services	Annual Evaluated Quantity*	Unit Firm Price/Hour Rate	Year One Evaluated Total Price
2.1.1	General Counselling and Planning (includes Intake Assessment)	4,581	\$	\$
2.1.2	One-on-one Career Counselling (Veterans)	4,980	\$	\$
2.1.3	One-on-one Counselling (Spouses)	1,246	\$	\$
2.1.4	Job Placement Assistance	1,536	\$	\$
2.1.5	Employment Transition Support (Veterans)	664	\$	\$

Contract Year 2

2.1	Career Transition and Education and Training Benefit Services	Annual Evaluated Quantity*	Unit Firm Price/Hour Rate	Year Two Evaluated Total Price
2.1.1	General Counselling and Planning (includes Intake Assessment)	4,365	\$	\$
2.1.2	One-on-one Career Counselling (Veterans)	8,280	\$	\$
2.1.3	One-on-one Counselling (Spouses)	2,415	\$	\$
2.1.4	Job Placement Assistance	2,556	\$	\$
2.1.5	Employment Transition Support (Veterans)	1,140	\$	\$

Contract Year 3

2.1	Career Transition and Education and Training Benefit Services	Annual Evaluated Quantity*	Unit Firm Price/Hour Rate	Year Three Evaluated Total Price
2.1.1	General Counselling and Planning (includes Intake Assessment)	4,635	\$	\$
2.1.2	One-on-one Career Counselling (Veterans)	10,432.5	\$	\$
2.1.3	One-on-one Counselling (Spouses)	2,443	\$	\$
2.1.4	Job Placement Assistance	3,216	\$	\$
2.1.5	Employment Transition Support (Veterans)	1,391	\$	\$

Option Year

2.1	Career Transition and Education and Training Benefit Services	Annual Evaluated Quantity*	Unit Firm Price/Hour Rate	Option year Evaluated Total Price
2.1.1	General Counselling and Planning (includes Intake Assessment)	4,365	\$	\$
2.1.2	One-on-one Career Counselling (Veterans)	11,842.5	\$	\$
2.1.3	One-on-one Counselling (Spouses)	178	\$	\$
2.1.4	Job Placement Assistance	3,648	\$	\$
2.1.5	Employment Transition Support (Veterans)	1,579	\$	\$

Billing for hourly rates for all Career Transition Services and Education and Training Benefit services will occur in 15 minute increments.

2.2 On-going Contract Operations

These charges are part of the ongoing operational contract costs, including all aspects of contract and service management, regularly scheduled change management process, training and materials, storage of information, on-going systems maintenance, website maintenance, monitoring and reporting, ongoing report production and quality assurance.

On-going Contract Operations – Year One Firm Price = \$ _____
On-going Contract Operations – Year Two Firm Price = \$ _____
On-going Contract Operations – Year Three Firm Price = \$ _____
On-going Contract Operations – Option Year Firm Price = \$ _____

The Contractor shall submit invoices on a monthly basis for 1/12 of the Firm Price.

Payment will be made upon VAC's acceptance of the on-going contract operations.

2.3 Contract Management

The central administration of the Career Transition Services Program and Education and Training Benefit contract must include a position, identified as the Contract Manager, residing in Canada, who will act as the liaison between the Contractor and VAC and PSPC. The Contract Manager will be the single point of contact to oversee all aspects of the activities listed in the SOW and will work with VAC to execute the Contractor's responsibilities to deliver the Career Transition Services and Education and Training Benefit Programs.

Contract Management – Year One Firm Price: \$ _____
Contract Management – Year Two Firm Price: \$ _____
Contract Management – Year Three Firm Price: \$ _____
Contract Management – Option Year Firm Price \$ _____

The Contractor shall submit invoices on a monthly basis for 1/12 of the Firm Price.

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

All Contract Management travel must be at the request of and pre-authorized by VAC. Payments will be made monthly based on eligible expenses incurred in the preceding month.

2.4 As and When

This component allows VAC to authorize and pay for unforeseen changes to the Career Transition Services Program and Education and Training Benefit resulting from changes in legislation, policy or any other requirements that are determined to be within the scope (as determined by the Contract Authority) of this contract as detailed in the SOW. These charges are to be billed as and when incurred. These charges are to be billed monthly as and when incurred, will not be re-occurring and must be pre-approved by the Project Authority as part of the Contract Management Process. As the requirements are unknown,

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VAC has estimated the annual costs. All charges shall be at reimbursed at actual costs without any allowance for profit or overheads.

As and When Requested **Year 1 Estimated Amount: \$20,000.00**
As and When Requested **Year 2 Estimated Amount: \$20,000.00**
As and When Requested **Year 3 Estimated Amount: \$20,000.00**
As and When Requested **Option Year Amount: \$20,000.00**

3.0 Contract Phase Out

The Contractor will be paid the firm, all-inclusive price including but not limited to, materials, labour, overhead and profit for the completion of all work to support complete and seamless transition to a new service provider for the career transition services without interruption of service delivery to VAC or the participants as described in section 7 of the SOW.

The Contract Phase Out period will commence upon VAC's written notification.

Firm Price = \$_____

The Firm Price for the above service will be subject to an annual adjustment commencing with Year Two of the Contract based on the annual EPA Clause (See section 4.0 of this Basis of Payment).

Once the Contract Phase Out has begun, the applicable Firm Price will become fixed and will no longer be subject to the EPA.

Payment will be made upon completion of all work to support complete and seamless transition to a new service provider as described in section 7 of the SOW.

ANNEX "C"

TECHNICAL EVALUATION CRITERIA

MANDATORY REQUIREMENTS

A Bidder's Proposal MUST meet the following Mandatory Requirements

Mandatory Requirement
<p>M1 Corporate Experience ^{PB}</p> <p>The Bidder must, within the last five (5) years (calculated as of the closing date of the RFP), be providing or have provided career transition services.</p> <p>In order to demonstrate this experience:</p> <ul style="list-style-type: none">• The Bidder must provide and describe one (1) project reference where the bidder was/is providing career transition services to a minimum of 250 participants in any one year period.• The project submitted must demonstrate the Bidder's experience in providing career transition services for a minimum of three (3) consecutive years, within the last five (5) years preceding the closing date of the RFP. <p>The referenced project should include, at a minimum, the following information:</p> <ul style="list-style-type: none">• Legal name;• Contact name, title, telephone number and email address for validation purposes;• The number of participants per annum. Minimum of 250 participants to be compliant; and• The start and end dates of the project. <p>The Bidder's corporate experience will be assessed under point-rated criterion in R1.</p>

FAILURE TO MEET THE MANDATORY REQUIREMENT AS STATED ABOVE WILL RESULT IN YOUR BID BEING DECLARED AS NON-COMPLIANT.

PB – THIS CRITERION IS SUBJECT TO THE PHASED BID COMPLIANCE POLICY

1.0 POINT RATED CRITERIA – General Information

EVALUATION OF SOW ELEMENTS – 21,000 Points Maximum (minimum overall pass mark = 14,700)

The evaluation of "point rated" responses will be made using a defined percentile scale as detailed below. In applying this scale, the score for each of the items in the Scoring Breakdown will fall into one of the six defined ratings (below) depending on the extent to which the requirement is met.

Point scores will be agreed on by consensus of the Evaluation Committee. Example: Scoring breakdown: ____/40 - Should consensus be reached to award 80 per cent, the score awarded for the item will be 32/40.

Percentage of possible score	Guide	Description
100%	Excellent	Response fully meets or exceeds the requirement
80%	Good	Response substantially meets the requirement, e.g., relevant response but some requirements not fully addressed or some lack of clarity in the Proposal and exceeds the 65% minimum threshold
65%	Adequate	Response is adequate, e.g., response only partially relevant, partially addressed or partially meets the requirements; however, it is sufficient to meet the 65% minimum threshold
40%	Fair	Response fails to meet the 65% minimum threshold, e.g., minimal relevant response or only minimally meets the requirement
20%	Poor	Response fails to meet the 65% minimum threshold, e.g., limited understanding of requirement, little evidence that requirement has been met
0%	Unacceptable	Response is not responsive, not relevant or not addressed

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Element	Evaluation Criteria	Total
R 1 – Corporate Experience – Total Points 2000 – Pass Mark = 1300 Points		2000
The referenced project provided in response to the Mandatory Requirement will be evaluated on the basis of the cited project's relevance and similarity to the requirements for delivery of career transition services. The referenced project should as a minimum include the following information: a. Description of how similar and relevant it is to the requirements as laid out in the SOW; b. Duration, including start and finish dates (dates should be identified by month and year); and c. Services delivered by the Bidder, within the program.	• Demonstrated experience in operationalizing and managing a contract for career transition services	800
	• Demonstrated experience in the storage, handling, transfer and destruction of participant protected information	400
	• Demonstrated experience in the development and maintenance of an Information Management system	400
	• Demonstrated experience in establishing and conducting performance measures and management reporting	400

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Element	Evaluation Criteria	Total
R2 – National Service Capabilities – Total Points 1000 – Pass Mark = 650 Points		1000
Bidders should provide information that describes how they will ensure that: a. services are provided consistently across all 10 provinces and 3 territories and for individuals who are posted overseas b. services will take into consideration the differences and challenges in the varying Canadian labour markets c. services will be available in the official language of choice of the client	• Demonstrated plan for the delivery of comprehensive, consistent service across all 10 provinces and 3 territories and for individuals who are posted overseas.	250
	• Demonstrated plan to consider the differences and challenges in the varying Canadian labour markets	500
	• Demonstrated plan for delivery of service in both official languages	250

Element	Evaluation Criteria	Points Assigned
R3 – Program Knowledge – Total Points 2000 – Pass Mark = 1300 Points		2000
Bidders should demonstrate an understanding of: the eligibility determination process and eligibility requirements for the Program/Benefit; the services/benefits available to those eligible; the duration of eligibility for the Program/Benefit for the respective group(s); and, how the services/benefits to those eligible may change over time.	<ul style="list-style-type: none"> Demonstrated understanding of client eligibility/eligibility determination process for CTS, including the plan for updating/confirming eligibility over time. 	100
	<ul style="list-style-type: none"> Demonstrated understanding of client eligibility/eligibility determination processes for the ETB, including the plan for collecting the information required to support ongoing eligibility, over time. 	100
	<ul style="list-style-type: none"> Demonstrated understanding of services/benefits available to those eligible for CTS, including a comprehensive description, supported by examples. Examples should demonstrate the bidder's understanding of how the services/benefits available to those eligible may change over time. 	400
	<ul style="list-style-type: none"> Demonstrated understanding of the services/benefits available to those eligible for the ETB, including a comprehensive description supported by examples. 	400
Bidders should demonstrate an understanding on how the services/benefits available under the Program/Benefit contribute to the achievement of the expected client outcomes and describe their plan for collecting the necessary information.	CTS	
	<ul style="list-style-type: none"> Demonstrated understanding of the expected client outcomes, and a detailed description of the bidder's plans to collect the required information 	200
	<ul style="list-style-type: none"> Explanation of how services delivered in accordance with their plan will contribute to the achievement of the client outcomes 	300
	ETB	
	<ul style="list-style-type: none"> Demonstrated understanding of the expected client outcomes, and a detailed description of the bidder's plans to collect the required information 	200
	<ul style="list-style-type: none"> Explanation of how services delivered in accordance with their plan will contribute to the achievement of the client outcomes 	300

Element	Evaluation Criteria	Points Assigned
R4 – Service Delivery – Total Points 5000 – Pass Mark = 3250 Points		5000
Bidders should provide detailed information and/or a plan that demonstrates their understanding of CTS and the ETB services/benefits and roles and responsibilities in delivering the services/benefits to those eligible.	Provision of detailed information and/or plan which demonstrates an understanding of the following: <ul style="list-style-type: none"> Services and benefits to be provided Contractor Roles and Responsibilities Client Roles and Responsibilities VAC Program Management Roles and Responsibilities VAC Project Authority Roles and Responsibilities 	1500 350 150 150 150
Bidders should provide detailed information/plans on how the services/benefits will be delivered to those eligible.	Provision of detailed information and/or plans which demonstrate an understanding of the following: <ul style="list-style-type: none"> The VAC referral/self-referral process The Intake Assessment and Re-assessment process The process of developing, updating, monitoring, recording progress and closing the CTS/ETB plan 	600 600 1500

Element	Evaluation Criteria	Points Assigned
R5 – Project Phases, General Requirements & Contract Phase Out Total Points 1000 – Pass Mark = 650 Points		1000
Bidders should provide detailed information/plan(s) that demonstrates their understanding of project phases.	Provision of detailed information and/or plans which demonstrate an understanding of the following phases: <ul style="list-style-type: none"> • Implementation phase • Operations and Maintenance phase • Contract Phase-Out 	50 50 50
Bidders should provide detailed information/service delivery plans which demonstrate an understanding of the general requirements.	Provision of detailed information and/or plans which demonstrate an understanding of the following requirements: <ul style="list-style-type: none"> • Access • Language of work • Location of facilities and work • Hours of work • Human resources requirements • Ethics and best practice • Contract manager • Employee security requirements • Service innovation • Revisions/Flexibility 	75 75 75 75 75 75 75 75 75 75
Bidders should demonstrate an understanding of the requirements to be met during contract phase-out.	<ul style="list-style-type: none"> • Provision of detailed information and/or plans which demonstrate an understanding of contract phase-out: Requirement for a comprehensive Contract Phase-Out Plan and follow through • Data conversion requirements 	50 50

Element	Evaluation Criteria	Points Assigned
R6 – Project Implementation Phase – Requirements - Total Points 2000 – Pass Mark = 1300 Points		2000
<p>The bidder is asked to develop and present a Project Implementation Plan and integrated schedule that will clearly demonstrate how and when they will develop, test and successfully implement all aspects of CTS and the ETB.</p> <p>Bidders should include how the VAC CTS & +the ETB will be integrated into their infrastructure and operational environment by the date of completion of the implementation period.</p>	<p>Bidder presents a plan that includes and describes the following components:</p> <ul style="list-style-type: none"> • Project Implementation Plan and Integrated Schedule • System Development/ Customization • Communications Plans and Materials • Reporting Services • Quality Assurance Program • Business Continuity Plan and Disaster Recovery Plan • Financial Requirements • Human Resources Plan • Contractor Staff Training • Privacy Standard Operating Procedures • Initial risk assessment and analysis 	<p>20</p> <p>20</p> <p>20</p> <p>20</p> <p>20</p> <p>20</p> <p>20</p> <p>10</p> <p>10</p> <p>20</p> <p>20</p>
	<p>The Project Implementation Plan and Integrated Schedule demonstrates that all services and systems will be ready for implementation, tested in time to correct deficiencies, and certified and accredited prior to the start date of the Operations and Maintenance Phase</p>	1000
<p>Bidder's plan should demonstrate an understanding of the requirements to be met during the project implementation phase.</p>	<p>Plan details which demonstrate a detailed understanding of the following requirements:</p> <ul style="list-style-type: none"> • System development/customization • Communication plans and materials • Reporting services • Quality assurance • Business continuity and disaster recovery • Financial requirements • Contractor staff training • Privacy standard operating procedures 	<p>100</p> <p>100</p> <p>100</p> <p>100</p> <p>100</p> <p>100</p> <p>100</p> <p>100</p>

Element	Evaluation Criteria	Points Assigned
R7 – Operations and Maintenance Phase Requirements - Total Points 8000 – Pass Mark = 5200 Points		8000
Bidders should demonstrate an understanding of the requirements to be met related to the contract manager and the contract administration office.	Detailed information which demonstrates understanding of the requirements related to the: <ul style="list-style-type: none"> Contract manager Contract administration office 	25 25
Bidders should demonstrate an understanding of the on-going staff training requirements.	Detailed information/training plan which demonstrates understanding of training requirements for staff	25
Bidders should demonstrate an understanding of and the ability to deliver the technical requirements.	Detailed information and/or plans which demonstrates understanding of and the ability to deliver the technical requirements: <ul style="list-style-type: none"> Security requirements Frontend channel Cross-domain automatic sign on Graphical user interface Communications between Contractor and VAC systems VAC supplied data Network acquisition and set-up Service provision Technical evaluation System enhancements during the life of the contract Network maintenance Operations infrastructure Systems management and maintenance 	300 400 300 300 500 300 300 300 800 400 300 400 400
Bidders should demonstrate an understanding of the business continuity and disaster recovery requirements.	Detailed information and/or plans which demonstrate understanding of business continuity and disaster recovery requirements	50
Bidders should demonstrate an understanding of the financial requirements.	Detailed information and/or plans/processes which demonstrate understanding of: <ul style="list-style-type: none"> Invoicing/payment for services Financial Control Framework Financial services/contract administration On-going contract operations Reporting requirements 	50 50 50 50 50
Bidders should demonstrate an understanding of the requirements for the data extract.	Detailed information and/or plans/processes which demonstrate understanding of the requirements for the data extract	50

Bidders should demonstrate an understanding of the performance and service standards.	Detailed information demonstrating the Bidder's understanding of the performance and service standards. The Bidder should describe the proposed performance measurement system and how performance will be tested against performance standards	300
Bidders should demonstrate an understanding of the management and performance reporting requirements.	Detailed information and/or plans/processes which demonstrate understanding of the management and performance reporting requirements	300
Bidders should demonstrate an understanding of file management requirements.	Detailed information demonstrating understanding of and ability to deliver the following file management requirements: <ul style="list-style-type: none"> Client database Inquiry function 	50 50
Bidders should demonstrate an understanding of records management requirements.	The Bidder demonstrates an electronic documents /records management system that has the ability to: <ul style="list-style-type: none"> Set retention and disposition periods Determine the last action date for all records Produce static, scheduled reports in addition to the ability to conduct pre-defined and ad hoc inquiries Run reports regarding record type, age of record, and last action date Group all information by specific client or subject Search the system for specific information Attach meta-data to stored records in accordance with the requirements of the SOW Provide a readable format to ensure records can easily be transferred back to and usable by the project authority at contract close-out. Store CTS and ETB information separately from all other information systems that the bidder may have in place 	50 50 50 50 50 50 50 50
	The proposed records management system demonstrates that information and data will be stored in accordance with the requirements of the SOW	75
	The proposed records management system demonstrates that any scanners/digital imaging used will be in	75

	accordance with/ follow the requirements of the SOW	
Bidders should demonstrate, by providing a comprehensive strategy, their understanding of the Access to Information and Privacy (ATIP) requirements.	<p>The ATIP strategy includes the overall plan for conforming to the applicable privacy policies, procedures, and guidelines in accordance with the <i>Access to Information Act</i> and the <i>Privacy Act</i>. The plan must include:</p> <ul style="list-style-type: none"> • Provisions on collection, use and disclosure of personal information • Detailed description on the privacy breach process. • Process regarding request for information. • Provision on providing the elements required for the completion of the Privacy Impact Assessment. 	<p>275</p> <p>150</p> <p>100</p> <p>75</p>
Bidders should demonstrate an understanding of security requirements.	<p>Detailed information and/or plans/processes which demonstrate understanding of:</p> <ul style="list-style-type: none"> • Identification and authentication management • Access management • IT configuration management security • Secure data storage management • Physical and environmental protection • System and communications protection • System and information integrity management • IT project management security • Security – information system life cycle and IT supply chain integrity • Monitoring and corrective actions • Information system audit requirements 	<p>100</p> <p>100</p> <p>25</p> <p>50</p> <p>50</p> <p>75</p> <p>75</p> <p>25</p> <p>25</p> <p>50</p> <p>25</p>
Bidders should demonstrate an understanding of the user support requirements.	<p>Detailed information and/or plans/processes which demonstrate understanding of user support requirements:</p> <ul style="list-style-type: none"> • Scope • Client user support • Contract user support to VAC 	<p>25</p> <p>25</p> <p>25</p>

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ANNEX “D”

SECURITY REQUIREMENTS CHECK LIST



Government
of Canada

Gouvernement
du Canada

RECEIVED
AUG 23 2017

Contract Number / Numéro du contrat

51019-17-6003

Security Classification / Classification de sécurité
UNCLASSIFIED

SECURITY REQUIREMENTS CHECK LIST (SRCL)

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

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE

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



Government
of Canada

Gouvernement
du Canada

Contract Number / Numéro du contrat

51019-17-6003

Security Classification / Classification de sécurité
UNCLASSIFIED

PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? ☒ No ☐ Yes
Non Oui

If Yes, indicate the level of sensitivity:

Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? ☒ No ☐ Yes
Non Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel :

Document Number / Numéro du document :

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

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

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

Special comments:

Commentaires spéciaux :

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.

REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

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

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?
Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ? ☒ No ☐ Yes
Non Oui

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

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? ☐ No ☒ Yes
Non Oui
11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? ☐ No ☒ Yes
Non Oui



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

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

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

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category Catégorie	PROTECTED PROTÉGÉ			CLASSIFIED CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET TRÈS SECRET	NATO RESTRICTED NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET COSMIC TRÈS SECRET	PROTECTED PROTÉGÉ			CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET TRÈS SECRET
											A	B	C			
Information / Assets Renseignements / Biens Production		✓														
IT Media / Support TI		✓														
IT Link / Lien électronique		✓														

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

☒ No
Non ☐ Yes
Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".

Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

☒ No
Non ☐ Yes
Oui

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

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



Government of Canada
Gouvernement du Canada

Contract number
51019-17-6003

Security Classification
unclassified

PART D - AUTHORIZATION

13. Organization Project Authority

Name (print)

Mary Nicholson

Title

Director, HCRIS

Signature

Telephone No.

902-566-8758

Facsimile No.

907-370-4827

E-mail address

Mary.nicholson@vac-acc.gc.ca

Date

Aug. 14/17

14. Organization Security Authority

Name (print)

Heather MacInnis

Personnel Security Officer / Agent secur pers
VAC / ACC

Signature

Heather MacInnis

Telephone No.

902-566-7167

Facsimile No.

902-368-0722

E-mail address

Heather.MacInnis@vac-acc.gc.ca

Date

AUG 18 2017

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

☒ No ☐ Yes

16. Procurement Officer

Name (print)

Monique Mader

Title

Procurement & Contracting

Signature

Telephone No.

902-626-2771

Facsimile No.

902-368-0397

E-mail address

Monique.Mader@vac-acc.gc.ca

Date

Aug 21, 2017

Linda Daly

Agente à la Sécurité des contrats | Contract Security Officer

Programme de la Sécurité industrielle | Industrial Security Program

Linda.Daly@tpsgc-pwgsc.gc.ca

Téléphone : 613-957-9337

Fax: 613-948-1712

Signature

Linda Daly

E-mail address

Date

Aug 29/17

Solicitation No. - N° de l'invitation
51019-176003/A
Client Ref. No. - N° de réf. du client
51019-176003

Amd. No. - N° de la modif.
File No. - N° du dossier
STJ-7-40063

Buyer ID - Id de l'acheteur
stj002
CCC No./N° CCC - FMS No./N° VME

ANNEX “E” to PART 3 OF THE BID SOLICITATION

ELECTRONIC PAYMENT INSTRUMENTS

The Bidder accepts to be paid by any of the following Electronic Payment Instrument(s):

- ☐ () VISA Acquisition Card;
- ☐ () MasterCard Acquisition Card;
- ☐ () Direct Deposit (Domestic and International);
- ☐ () Electronic Data Interchange (EDI);
- ☐ () Wire Transfer (International Only);
- ☐ () Large Value Transfer System (LVTS) (Over \$25M)

ANNEX "F" to PART 5 OF THE BID SOLICITATION

FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY – CERTIFICATION

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

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

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

Complete both A and B.

A. Check only one of the following:

- ☐ A1. The Bidder certifies having no work force in Canada.
- ☐ A2. The Bidder certifies being a public sector employer.
- ☐ A3. The Bidder certifies being a [federally regulated employer](#) being subject to the [Employment Equity Act](#).
- ☐ A4. The Bidder certifies having a combined work force in Canada of less than 100 permanent full-time and/or permanent part-time employees.

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

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

OR

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

B. Check only one of the following:

- ☐ B1. The Bidder is not a Joint Venture.

OR

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

Buyer ID - Id de l'acheteur
stj002
CCC No./N° CCC - FMS No./N° VME