Request for Proposal / Demande de Proposition : 100009842

RETURN BIDS TO:

Employment and Social Development Canada (ESDC)

Attention:

Manon Rondeau

nc-solicitations-gd@hrsdc-rhdcc.gc.ca

REQUEST FOR PROPOSAL

Proposal To: Employment and Social Development 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 thereof.

Instructions: See Herein

Vendor/Firm Name and address

Title:		
Evaluation and research project	s on labour marke	et
programming		
Solicitation No.	Date	
File No. – N° de dossier		
100009842		
		Time Zone
Solicitation Closes		Eastern
		Standard
At 02:00 PM / 14 h		Time
March 29, 2018		(EST)
Address Inquiries to :		
nc-solicitations-gd@hrsdc-rh	ndcc.gc.ca	
Size limit – 13MB		
3.23		
Destination		
See Herein		

Vendor/firm Name and address :	
Facsimile No. Telephone No.	
Name and title of person authorized to sign on behalf of Vendor/firm (type or print)	
Signature	Date



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TITLE: Evaluation and research projects on labour market programming

This is a request for proposals for programs of research/evaluation to support ESDC evaluations of current labour market programming. The Request for Proposals is intended to result in the award of two (2) contracts for two (2) programs of research/evaluation. Each contract will be for a duration (approximately) of one hundred and seventy-two weeks (172 weeks) form the date of award or until approximately December 2021.

PART 1 - INFORMATION AND INSTRUCTIONS

1. **Security Requirement**

There is a security requirement associated with the requirement. For additional information, consult Part 1 -Information and Instructions, clause 7.4, Security Requirement, and Part 2 - Resulting Contract Clauses.

2. Statement of Work

See Annex "A".

3. 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 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 (2016-04-04) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation, with the exception of the following:

- 1. Replace references to 'Public Works and Government Services Canada' with 'Employment and Social Development Canada';
- 2. Delete Section 02, Procurement Business Number, in its entirety;
- 3. Revise Subsection 2d. of Section 05, Submission of Bids, to read:

"send its bid only to the physical or e-mail address specified on Page 1".

4. Subsection 5.4 of Section 05 is amended as follows:

Delete: sixty (60) days

Insert: ninety calendar (90) days

- 5. Delete Subsections 1a. and 1b. of Section 12, Rejection of Bid, in their entirety.
- 6. Delete Subsection 2. of Section 20, Further Information, in its entirety.



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Submission of Bids 4.

Bids must be received at the email address nc-solicitations-gd@hrsdc-rhdcc.gc.ca, by the time and date indicated on the cover page of this RFP document.

It is the Bidders responsibility to ensure their proposal and all associated documents are received in full and on time. It is advised that Bidders send the proposal in advance of the closing time to ensure confirmation of receipt. Bidders should ensure e-mails do not exceed 13MB to avoid problems with transmission.

Canada requests that bidders provide their full company name and address, e-mail address, as well as contact name, and telephone number.

Canada requests that bidders provide their bid in separately bound sections, in two separate files, when in soft copy, as follows:

Section I: Technical Bid (1 via e-mail), nc-solicitations-gd@hrsdc-rhdcc.gc.ca

Section II: Financial Bid (1 via e-mail), nc-solicitations-gd@hrsdc-rhdcc.gc.ca

Section III: Certifications (1 via e-mail) nc-solicitations-gd@hrsdc-rhdcc.gc.ca

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

5. **Mandatory Certifications Required Precedent to Contract Award**

The certification(s) listed below should be completed and submitted with the bid but may be submitted afterwards. If any of the(se) required certification(s) is not completed and submitted as requested, 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.

The certifications provided by bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default, if any certification made by the Bidder is found to be untrue whether 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 with this request will also render the bid non-responsive or will constitute a default under the Contract.

5.1 **Declaration of Convicted Offences**

If requested by the Contracting Authority, pursuant to subsection Declaration of Convicted Offences of section 01 of the Standard Instructions, the Bidder must provide a completed Declaration Form (http://www.tpsgc-pwgsc.gc.ca/ci-if/formulaire-form-eng.html), to be given further consideration in the procurement process.



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Integrity Provisions – List of Names

Bidders who are incorporated, including those bidding as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Bidder.

Bidders bidding as sole proprietorship, as well as those bidding as a joint venture, must provide the name of the owner(s).

Bidders bidding as societies, firms or partnerships do not need to provide lists of names.

5.2 Former Public Servant Certification

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. 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;
- an individual who has incorporated; b.
- a partnership made of former public servants; or C.
- 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 e. 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.
- f. "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.



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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 ()

* Bidder (For greater clarity, the "Bidder" means the vendor legal entity (e.g. not a resource of the vendor legal entity).

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

- 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:

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

5.3 Status and Availability of Resources

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



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If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

5.4 **Education and Experience**

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

6. **Enquiries - Bid Solicitation**

All enquiries must be submitted to the Contracting Authority no later than 15 calendar days before the bid closing date. Enquiries received after that time may not be answered.

7. **Evaluation Procedures**

Bids received will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria specified below:

7.1 **Technical Evaluation**

All bids must be completed in full and provide all of the information requested in the bid solicitation to enable full and complete evaluation. All mandatory technical criteria are identified specifically with the words "shall", "must", or "will".

Mandatory and point rated technical evaluation criteria are included in Annex"C".

7.2 **Financial Evaluation**

The price of the bid will be evaluated in Canadian dollars, Applicable Taxes excluded, FOB destination, Canadian customs duties and excise taxes included.

The financial bid MUST submit prices as requested in the Pricing Schedule at ATTACHMENT 1 TO PART 1. The total amount of Goods and Services Tax (GST) or Harmonized Sales Tax (HST), as applicable, must be shown separately, if applicable.



7.3 Basis of Selection -

Highest Combined Rating of Technical and Price

- 1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria; and
 - c. obtain the required minimum of 65 points overall for the technical evaluation criteria which are subject to point rating.

The rating is performed on a scale of **100 points**.

- 2. Bids not meeting (choose "(a) or (b) or (c)" will be declared non-responsive.
- 3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 80% for the technical merit and 20% 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 80%.
- 5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 20%.
- 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.
- Tie Breaker: When two or more responsive proposals achieve the identical score, the proposal with the highest score in the Rated Criteria will be will be recommended for contract award.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 80/20 ratio of technical merit and price, respectively. The total available points for technical score equal 100 and for price, 40 points, based on the lowest evaluated price of \$40,000.

Basis of Selection - Highest Combined Rating Technical Merit (80%) and Price (20%)

Description		Bidder 1	Bidder 2	Bidder 3	
Overall Technical Score		91/100	88/100	80/100	
Bid Evaluated	Bid Evaluated Price		\$40,000.00	\$47,000.00	
	Technical Merit Score	91/100 x 80 = 72.80	88/100 x 80 = 70.40	80/100 x 80 = 64	
Calculations	Pricing Score	40/50 x 20 = 16	40/40 x 20 = 20	40/47 x 20 = 17.20	
Combined Rating		88.80	90.40	81.20	
Overall Rating		2nd	1st	3rd	



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7.4 Security Requirement

- 1. Before award of a contract, the following conditions must be met:
 - (a) the Bidder must hold a valid organization security clearance as indicated in Part 2 Resulting Contract Clauses:
 - (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in Part 2 Resulting Contract Clauses:
 - (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
- 2. In the case of a joint venture bidder, each member of the joint venture must meet the security requirements.
- 3. 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.
- 4. For additional information on security requirements, bidders should refer to the <u>Canadian Industrial Security Directorate (CISD)</u>, <u>Industrial Security Program</u> of Public Works and Government Services Canada (http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html) website.

8. Applicable Laws

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

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.

9. Debriefings

After contract award, 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 of receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone or in person.





ATTACHMENT 1 TO PART 1

Pricing Schedule

The bidder must complete this pricing schedule and include it in its Financial Bid.

Any estimated level of services specified in this pricing schedule is provided for bid evaluation price determination purposes only. Levels of efforts are provided as estimates only, and must not be construed as a commitment by ESDC to respect those estimates in any resulting contract.

The Contractor will be paid in accordance with the following milestones/deliverables:

Milestone No.	Description or Deliverable	Due Date	Total Firm Price (Customs duties are included and Applicable Taxes are Extra)
1	Preliminary outline of project due	Signature Date + 6 weeks	
2	First draft of paper(s) due	Signature Date + 52 weeks	
3	Participation to first meeting/workshop	Signature Date + 58 weeks	
4	Final paper(s) due for peer review	Signature Date + 100 weeks	
5	Final paper(s) (including revisions based on peer reviews) and executive summary due	Signature Date + 112 weeks	
6	Participation to second workshop	Signature Date + 120 weeks	
7	Version of the paper for publication in Journal	Signature Date + 172 weeks	



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PART 2 - RESULTING CONTRACT CLAUSES

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

- 1. Applicable Laws
- 2. **Priority of Documents**
- 3. Statement of Work
- 4. Standard Clauses and Conditions
- 5. Security Requirement
- Term of Contract 6.
- Authorities 7.
- 8. **Payment**
- Method of Payment 9.
- Invoice Submission 10.
- Proactive Disclosure of Contracts with Former Public Servants 11.

List of Annexes:

Annex "A"	Statement of Work
Annex "B"	The Medium Term Performance Indicators Database
Annex "C"	Evaluation Criteria
Annex "D"	Security Requirements Check List



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1. **Applicable Laws**

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

2. **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.

- the Articles of Agreement; (a)
- (b) the General Conditions 2035 - Higher Complexity Services (2016-04-04)
- (c)
- Annex "A", Statement of Work; Annex "B", The Medium Term Performance Indicators Database (d)
- Annex "D", Security Requirements Check List); (e)
- the Contractor's bid dated , (Fill in at time of contract award.) (f)

3. Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex "A".

Standard Clauses and Conditions 4.

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/standardacquisition-clauses-and-conditions-manual) issued by Public Works and Government Services Canada.

Whenever 'Public Works and Government Services Canada' appears in any of the standard clauses or the General or Supplemental Conditions replace with "Employment and Social Development Canada".

4.1 **General Conditions**

2035 (2016-04-04) General Conditions – Higher Complexity Services, apply to and form part of the Contract, with the following exceptions:

- 4.1.1 Delete reference to 'Client Reference Number (CRN)' and 'Procurement Business Number (PBN)' from Section 06, sub-section 2.a
- 4.1.2 Delete sub-sections 08
- 4.1.3 Delete sub-sections 09
- 4.1.4 Delete sub-sections 10

5. **Security Requirement**

5.1

- (Company name) personnel requiring access to PROTECTED information, assets or work site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by the Canadian Industrial Security Directorate (CISD), PWGSC and have a need to know basis for the information.
- Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD, PWGSC.
- The Contractor/Offeror must comply with the provisions of the:
 - a. Security Requirements Check List and security guide (if applicable), attached at Annex C;
 - b. Industrial Security Manual (Latest Edition).





Employment and Social Development Canada

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6. Period of the Contract

The period of the Contract is from the contract award date to December 31, 2021 inclusive.

7. Authorities

7.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Manon Rondeau

Title: Contract Specialist Expert

Employment and Social Development Canada (ESDC)

Procurement Operations

Address: 140 Promenade du portage, Gatineau, QC K1A 0J9

Telephone: 819 654-2597 Facsimile: 819 953-6859

E-mail address: manon.rondeau@hrsdc-rhdcc.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.

7.2 Project Authority

The Project Authority for the Co	ontract is: (Fill in a	t time of contract award.)
----------------------------------	------------------------	----------------------------

Name:

Title:

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.



Contractor's Representative (Fill in at time of contract award.)

The Contractor's Representative for the Contract is:

7.3

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	Name: Title: Compa Addres	any:
	Teleph Facsin E-mail	
8.	Payme	ent
8.1	Basis	of Payment – Firm Lot Price(s)
		sideration of the Contractor satisfactorily completing all of its obligations under the Contract, the ctor will be paid a firm lot price" of \$ Customs duties are included, and Applicable Taxes tra.
		a will not pay the Contractor for any design changes, modifications or interpretations of the Work, they have been approved, in writing, by the Contracting Authority before their incorporation into the
8.2	Limita	tion of Expenditure
1.		a's total liability to the Contractor under each Contract must not exceed \$125,000.00 . Customs duties lluded and Applicable Taxes are extra.
2.	modific change their ir would	rease in the total liability of Canada or in the price of the Work resulting from any design changes, cations or interpretations of the Work, will be authorized or paid to the Contractor unless these design es, modifications or interpretations have been approved, in writing, by the Contracting Authority before accorporation into the Work. The Contractor must not perform any work or provide any service that result in Canada's total liability being exceeded before obtaining the written approval of the Contracting ity. 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.		notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a estimate for the additional funds required. Provision of such information by the Contractor does not



increase Canada's liability.

Employment and Social Development Canada

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9. Method of Payment

9.1 Milestone Payments

Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract if:

- a. an accurate and complete claim for payment and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

9.2 Schedule of Milestones

The schedule of milestones for which payments will be made in accordance with the Contract is as follows:

Payments for proposals invited to proceed will normally be scheduled as follows:

- 1. upon submission of a preliminary outline for the paper, including planned methodology;
- 2. upon submission of a satisfactory first draft;
- 3. upon participation to the first meeting/workshop;
- 4. upon submission of a satisfactory final paper(s) for peer review;
- 5. upon submission of a satisfactory final paper(s) including revisions based on peer reviews and an executive summary;
- 6. upon participation to the second meeting/workshop; and
- 7. upon submission of a journal version of the paper(s

Reports will be supplied to ESDC in Microsoft Word electronic file format. No tables and charts are to be copied into the reports as pictures.

Payments will be based on the deliverables. Payment will be made within 30 days after receipt of an invoice and upon acceptance of each deliverable by the Project Authority.

Milesto ne No.	Description or Deliverable	Due Date	% of total Contract	Firm Price
1	Preliminary outline of project due	Signature Date + 6 weeks	40%	
2	First draft of paper(s) due	Signature Date + 52 weeks	30%	
3	Participation to first meeting/workshop	Signature Date + 58 weeks	2%	
4	Final paper(s) due for peer review	Signature Date + 100 weeks	10%	
5	Final paper(s) (including revisions based on peer reviews) and executive summary due	Signature Date + 112 weeks	15%	
6	Participation to second workshop	Signature Date + 120 weeks	2%	
7	Version of the paper for publication in Journal	Signature Date + 172 weeks	1%	
Total (Customs duties are included and Applicable Taxes are extra)				



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10. **Invoice Submission**

1. Invoices must be submitted in the Contractor's name, either by mail to the address on the cover page or by e-mail to the Project Authority (see article 7.2). The Contractor must submit invoices for each delivery or shipment; invoices must only apply to the Contract. Each invoice must indicate whether it covers partial or final delivery.

2. Invoices must show:

- the date, the name and address of the client department, item or reference numbers, a. deliverable/description of the Work, contract number, Procurement Business Number (PBN), if applicable, and financial code(s):
- b. details of expenditures (such as item, quantity, unit of issue, unit price, fixed time labour rates and level of effort, subcontracts, as applicable) in accordance with the Basis of Payment, exclusive of Applicable Taxes;
- deduction for holdback, if applicable; c.
- d. the extension of the totals, if applicable; and
- if applicable, the method of shipment together with date, case numbers and part or reference e. numbers, shipment charges and any other additional charges.
- 3. Applicable Taxes must be specified on all invoices as a separate item along with corresponding registration numbers from the tax authorities. All items that are zero-rated, exempt or to which Applicable Taxes do not apply, must be identified as such on all invoices.
- By submitting an invoice, the Contractor certifies that the invoice is consistent with the Work 4. delivered and is in accordance with the Contract.

10.1. **T1204 Information Reporting by Contractor**

Pursuant to paragraph 221 (1)(d) of the *Income Tax Act*, R.S. 1985, c.1 (5th Supp.), payments made by departments and agencies to contractors under applicable services contracts (including contracts involving a mix of goods and services) must be reported on a T1204 Government Service Contract Payments slip.

11. **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



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12. Certifications

12.1 Compliance

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



ANNEX "A"

STATEMENT OF WORK

1. PROJECT TITLE

Evaluation and research projects on labour market programming.

2. OBJECTIVE

This is a Request for Proposals for programs of research/evaluation to support ESDC evaluations of current labour market programming. The programs of research/evaluation are being commissioned as part of the ESDC Evaluation Plan to provide supplementary evidence to support ESDC evaluations of federally funded labour market programming in Canada and the El Commission annual Employment Insurance Monitoring and Assessment Report (EI part I and II).

BACKGROUND

ESDC Evaluation of labour market programs

ESDC evaluates Ministry programs on the basis of a five-year Evaluation Plan, in accordance with the Treasury Board Secretariat (TBS) Policy on Results. Within this requirement, ESDC creates evaluation reports pertaining to the relevance, effectiveness (i.e., outcomes and impacts) and cost-effectiveness of Labour Market Programs. The studies that make up these reports focus on addressing current knowledge gaps about Labour Market Programs. They provide evidence to support emerging policy needs by identifying what works. Objectives of this activity include conducting:

- Annual quantitative analysis of Labour Market Program short-term incremental impacts (2 years postprogram) using administrative data.
- Quantitative analysis of Labour Market Program outcomes and impacts at the medium term (5 years post-program) using administrative data.
- Assessment of targeted questions about Labour Market Programs' relevance, effectiveness and costeffectiveness.
- Supplementary studies on the effectiveness of the Employment Insurance Program for the Employment Insurance Monitoring and Assessment Report.

The Medium Term Indicators Performance indicators data base

The Medium Term Indicator (MTI) Performance Indicators Project began as a joint federal-provincial project designed to test the feasibility of using administrative data to measure and report on the effectiveness of Labour Market Development Agreements (LMDAs) over the medium- to long-term.



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The main purpose of the MTI Performance Indicators Project is to develop incremental performance indicators for the measurement of the medium- to longer-term effects of Labour Market Program interventions. In terms of the LMDAs, this was successfully examined across all provinces and territories as well as nationally for the second cycle of evaluations (see Evaluation of Labour Market Development Agreements report at: https://www.canada.ca/en/employment-social-development/corporate/reports/evaluations/labour-marketdevelopment-agreements.html). These indicators are developed using a comparison group approach and administrative data from the EI databank and the T1, T4 and Child Tax Benefits files from the CRA updated to the most current data available.

The MTI Performance Indicators database is used to generate labour market indicators in order to measure the following (but without being limited to) program outcomes:

- Earnings and Income (from CRA tax data);
- Employment (from a combination of the EI databank and CRA tax data); and
- Reliance on the Social Safety Net, both in duration and monetary terms:
- Use of EI (determined from the EI administrative databank);
- Use of SA (determined on an annual basis from the CRA T1 tax data).

These indicators can be disaggregated by categories in order to answer policy questions on the effectiveness of Labour Market Programs such as what works for whom and, where sample size permits, disaggregate indicators by the characteristics and status of clients, as determined by the EI databank and CRA tax data, including by age, gender, occupation, industry, province, El claim status (active or former), time since job loss and other various socio-economic and demographic characteristics, such as skills or educational levels, long-term unemployed vs. short-term unemployed, urban vs. rural areas, frequent El users, older workers, long-tenured workers; new entrants/re-entrants, etc. A description of the ESDC MTI Performance Indicators database is presented in Annex B.

Over the next year, ESDC will expand the MTI Performance Indicators database to conduct the evaluations of the Youth Employment Strategy (YES) and the Aboriginal Skills and Employment Training Strategy (ASETS) using the same methodology and indicators used for the evaluation of the LMDAs. The expansion of the MTI Performance Indicators database to include these programs will increase significantly the research and evaluation potential of MTI Performance Indicators database by providing longitudinal information not only on participants to one single program but also on the participation to one or more programs overtime. In the medium term (in the next 3-4 years), additional ESDC Labour Market Programs (e.g., Workforce Development Agreements announced in Budget 2017) will also be added to the MTI Performance Indicators database increasing further its potential for research and evaluation.

By the end of June 2018, we expect that the MTI Performance Indicators database including the three ESDC labour market programs (LMDA, YES, ASETS) will be completed and could be made available to researchers under contracts with ESDC. In the longer term, ESDC's objective is to make the MTI Performance Indicators database available in RDCs. This should facilitate continuation of a collaborative relationship beyond the contract period



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4. PROJECT REQUIREMENTS

ESDC plans to provide funding for two programs of research/evaluation in areas of labour market programing using the MTI Performance Indicators database. Projects under each research/evaluation programs would supplement current research/evaluation activities and/or address an important labour market policy issue and would engage both academic and ESDC evaluators/researchers.

Programs of research/evaluation would be undertaken collaboratively so that policy-relevant researchable questions that need empirical answers are formulated and addressed while taking into account the challenging features of the available data and applying the most appropriate econometric and statistical methods.

To facilitate and ensure engagement, researchers will be expected to participate in two meetings/workshops (inperson or virtually). The purpose will be to review progress, to provide constructive comments in relation to issues that have yet to be resolved and work that has yet to be done, and discuss new issues of research/evaluation that have arisen.

Researchers will have the right to publish their results; indeed, they will be expected to produce papers of publishable quality. The research may also be posted at the ESDC website and used in ESDC Evaluation Reports.

Proposal requirements

Proposals must contain (but not exclusively) new research using the MTI Performance Indicators database.

Proposals need to contribute to better understanding of Canada's labour market programs and/or Canada's labour market dynamics.

Proposals must be national in scope (no provincial/territorial dimension).

All proposals and papers will be peer reviewed. Reviewers will assess the academic excellence of the proposed program of research/evaluation, its potential contribution to knowledge and its policy relevance (broadly defined). Only proposals that meet all three criteria – academic excellence, contribution to knowledge and policy relevance will be funded.

Interested parties are invited to submit brief proposals (of up to five pages) for collaborative programs of research/evaluation using the MTI Performance Indicators database. Proposals should include a title, the policyrelevant research/evaluation question(s) to be addressed and an explanation of their relevance for public policy (bearing in mind ESDC mandate), situating it in the relevant literature and indicating the gaps in our knowledge that it proposes to fill, the theoretical underpinnings, a description of the data to be used, the proposed empirical approach, the personnel to be involved, and a budget. The CVs of all co-investigators should be included with the proposal.

Proposals and final papers may be written in English or French. ESDC will work with researchers to establish mutually satisfactory collaborations after decisions have been made about which proposals will be invited to proceed.



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SCHEDULE FOR DELIVERABLES

The timelines for the project proposals are as follows:

An information session/workshop will be organized in late January, 2018 to provide detailed information on the MTI Performance Indicators database and discuss its potential for research/evaluation in the area of labour market programming. The objective of the information session is to provide researchers with sufficient information on the potential of the MTI Performance Indicators database before drafting and submitting their proposals.

Details on the participation to the information session are the following:

Date: January 24, 2018

Time: From 12:30 to 4:30 pm (Gatineau Time) WebEx link: https://pwgsc-nh-fr.webex.com

Meeting ID: 557 722 027

Toll Free Dial In Number (Canada/U.S.): 1 877-413-4790

Conference ID: 9433645

In person: Location: Promenade du Portage, Phase IV, 3rd Floor, Gatineau, Québec, Room 3-1

Closing date: March 30, 2018 at 14h

April, 30, 2018 Researchers are informed of decision and given feedback from peer reviews



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6. USE, RETENTION, DISPOSAL, AND SECURITY REQUIREMENTS

- 1. For the purpose of allowing the Contractor to perform the work under the contract, ESDC shall make available to the Contractor, in accordance with the Department of Human Resources and Skills Development Act, the Department of Social Development Acts and other applicable laws governing the protection of information under its control, the following information:
 - Medium Term Indicators (MTI) Performance Indicator database includes masked data on 100 percent of individuals who participated in the major labour market programs including: Labour Market Development Agreements (LMDAs), Youth Employment Strategy, Aboriginal Human Resources Development Agreements (AHRDAs), Aboriginal Skills and Employment Partnerships (ASEP)) and Indigenous Skills and Employment Strategy (ISET - previously ASETS) from 1996 to the most recent available (2016). MTI database include also information on 20 to 100 percent of individuals who received Regular El benefits, but had no participation under the LMDAs from 1996 to the most recent year for which data is available (2016) which constitute a potential pools of control group.
 - The files containing masked data on participants and non-participants are linked to Employment Insurance (EI) administrative data files such as Status Vector (SV) to include detailed data on claim experience and Record of Employment (ROE) data on job separation. It also includes Canada Revenue Agency (CRA) data on earnings and receipt of social assistance (SA) from 1990 to the most recent year available (2015).

All data will be stored and accessed through an ESDC protected and secure server for the duration of the contract.

- 2. Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, the Contractor shall not use or disclose the information referred to in section 1 above except for the purpose of performing the work under the contract.
- 3. The Contractor shall maintain all information referred to in section 1 above, and make sure it is only accessible, in Canada.
- 4. The Contractor shall segregate all records containing information referred to in section 1 above (whether in electronic format or in hard copy) from its other records, and keep all databases in which such records are to be maintained physically independent from all other database, directly or indirectly, which are located outside Canada.
- 5. The Contractor shall ensure that all aspects of the processing of information referred to in section 1 above are conducted and only accessible in Canada.
- The Contractor shall take all necessary measures to ensure that every person it hires, or the services of whom it retains to fulfill its obligations under this contract, knows and complies with all the terms and conditions of this contract with respect to the protection of information referred to in section 1
- 7. Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, the Contractor will ensure that no information referred to in section 1 above, is disclosed to a third party for a purpose authorised herein, unless there is a written agreement between the Contractor and the third party, imposing upon the third party obligations that are the same as those that are imposed upon the Contractor under this contract with respect to the protection of this information.
- 8. The information referred to in section 1 above remains at all times under the control of ESDC.
- 9. The information referred to in section 1 above is protected by the Privacy Act and any other applicable federal laws governing the protection of personal information held by federal institutions. That information shall be treated as such by the Contractor in accordance with the HRSDC Security Policy and Procedures Manual, the Government of Canada Security Policy or other instructions that ESDC may issue.



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- 10. Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, the Contractor shall not make any copies of the information referred to in section 1 above except with the written consent of ESDC.
- 11. Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, upon expiry or termination of the contract, whichever is earlier, the Contractor shall return to **ESDC** the information referred to in section 1 above and copies thereof, if any.
- 12. The Contractor's premises shall be open for inspection by authorized representatives of ESDC at reasonable times to ensure compliance with the provisions of this contract governing the protection of personal information.
- 13. The Contractor shall notify ESDC immediately after he becomes aware that a breach of any provision of this contract governing the protection of personal information has occurred.
- 14. Any intentional breach by the Contractor of any provision of this contract governing the protection of personal information constitutes a fundamental breach of contract such that the contract may be terminated by ESDC.

7. INTELLECTUAL PROPERTY

The Minister of Employment and Social Development Canada has determined that any intellectual property arising from the performance of the Work under the Contract will vest in and remain the property of the contractor.

The main purpose of the Contract, or of the deliverables contracted for, is to generate knowledge and information for public dissemination. Therefore, the contractor may publish any papers that are generated from this contract.





ANNEX "B"

The Medium Term Performance Indicators Database

1. Introduction

The Medium Term Performance Indicators Database is a vital source of labour market performance indicators that are used to generate estimates of net incremental program impacts. Initially, the primary objective of the panel database developed for the Medium Term Performance Indicators project was to use available administrative data in order to generate performance indicators and to evaluate the Canadian Employment Benefit and Support Measures programs delivered under the Labour Market Development Agreements when survey information is not available. The core methodology of the project is quasi-experimental and it focuses entirely on quantitative impacts, in which the data model enabled a comparative analysis of program participants against a closely matched comparison group.

This database officially replaced other annual surveys at the beginning of 2010, and since then, it has been used as the main source of information to evaluate the effectiveness of the Employment Benefit and Support Measures programs under Labour Market Development Agreements.

The Evaluation Directorate has developed and refined the various processes and methodologies used to generate these indicators progressively by using this informative administrative data.

Recently, Evaluation Directorate extended the database to include all other major labour market programs such as the Youth Employment Strategy, Aboriginal Human Resources Development Agreements, Aboriginal Skills and Employment Partnerships and Indigenous Skills and Employment Strategy. A final updated and refined data dictionary of the extended Medium Term Performance Indicators will be available before data is released to researchers in June 2018.

In the following sections, we summarize the development of the database and provide some concepts, notes, and definitions. We also describe the data sources that were used to create the integrated database, as well as the most important data elements. The last section provides a list of evaluations and studies conducted using this database.

2. Historical Background and MTI Objectives

In the first cycle of Labour Market Development Agreements evaluations in 2000s, most formative and summative evaluations used participant survey data as a primary line of evidence. These surveys, which were undertaken by external consultants, were very costly. Between 2002 and 2012, approximately \$10M was spent on these contracts (about \$1M per year). The surveys did not always have sufficient sample sizes, and evaluation reports were frequently published long after the information they contained were useful for program management. However, during the first cycle of evaluations, the evaluation team successfully tested new methodologies to measure program impacts using exclusively linked administrative data from the Employment Insurance program.

Discussions regarding the development of the Medium Term Performance Indicators project began in 2000 as an Employment and Social Development Canada initiative. It was designed to replace costly annual surveys and to test the feasibility of using only administrative data to measure and report on the post-intervention effectiveness over the Medium Term, i.e. a 5 year period.

The Medium Term Performance Indicators project was initially developed to measure program outcomes using labour market incremental indicators. It has since evolved to address several evaluation challenges such as:

- To create tools so that the Evaluation Directorate staff could conduct in-house evaluations of labour market programs, thereby, reducing the cost related to externally contracted surveys.
- To generate timely and more responsive evaluations by improving efficiency and utility.
- To identify non-participants who can be matched as closely as possible to program participants, thus creating reliable and robust comparison groups.



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- To develop Medium Term performance indicators for Employment Benefits and Support Measures programs delivered under the Labour Market Development Agreements.
- To measure the incremental impact of a program on participants as a key performance indicator for labour market evaluations.

By 2011, a large volume of longitudinal administrative data had been accumulated, making it possible to examine the sustainability of the short-term effects of labour market interventions. It is in this context that the evaluation team started to use state-of-the-art econometric methods and administrative data analyses as tested in cycle I evaluations to measure short- and Medium Term indicators to determine program effects.

By conducting all evaluation activities in-house and relying only on administrative data, Employment and Social Development Canada reduced annual costs to about \$70K per year for cycle II evaluation work which included peer reviews and development of data processing tools. (The costs do not include internal salaries or expenses incurred by participating provinces and territories).

3. Concepts, Notes and Definitions

The Medium Term Performance Indicators database is a longitudinal dataset spanning 20 years of data. It integrates program participants from administrative databases and a large sample of comparison cases generated by linking Employment Insurance and Income Tax data. The size of the database is estimated to be approximately one terabyte containing around 540,000 participants and 2 million potential comparison cases on average per year.

In short, this database contains six main entities (see Table 1) based on different longitudinal administrative microdata sets, linked by masked social insurance numbers, and provides a full sampling frame of Employment Insurance active claimants' participants and comparison group members.

More precisely, the database now includes masked data on 100 percent of individuals who participated in the major labour market programs including the Labour Market Development Agreements. Youth Employment Strategy. Aboriginal Human Resources Development Agreements, Aboriginal Skills and Employment Partnerships and Indigenous Skills and Employment Strategy. Data is available from 1996 to 2016.

It also includes masked information on 20 to 100 percent of individuals who received Regular Employment Insurance benefits but did not participate in labour market programs from 1996 to the most recent year for which data is available (2016). This constitutes a potential pool of control group individuals.

The files containing masked data on participants and non-participants are linked to Employment Insurance administrative data files to include detailed data on claim experience and Record of Employment data on job separation. It also includes Canada Revenue Agency data on earnings and receipt of social assistance from 1990 to the most recent year available (2015).

Table 1 provides the number of observations for the main data sources, their scope, and timeframes. The size of data in each data source depends on the frequency at which individuals are recorded during the data collection. For example, Employment Insurance Part I data contain detailed information on all of the activities of an individual (Employment Insurance claimant).

The files include a large number of characteristics reflecting individual labour market experience such as:

- **Record identifiers**: unique sequence number associated with individual.
- Intervention related information: Start and end date of the intervention, type of interventions, province and intervention outcome codes.
- Socio-demographic characteristics: age, gender, marital status, disability, aboriginal status, visible minority status, dependent children, years since immigration to Canada, new entrance in labour force, region and province.



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- Occupational characteristics: Employment Insurance Claim related information, occupational group, skill levels related to last job before opening their Employment Insurance claim, industry codes, insured hours, reason for separation, Employment Insurance economic region, Client type, unemployment duration,
- Labour market history: Employment/Self-Employment earnings, social assistance income, incidence of employment, net farm income, net fishing income, net commission income, net professional income, total income, other employment income, Employment Insurance benefits and weeks.

Target population:

Labour Market Program Participants:

- 100% of individuals who received Employment Benefits and Support Measures under the Labour Market Development Agreements across Canada from 1996 to the most recent year for which data is available.
- 100% of individuals who received interventions under the Youth Employment Strategy program (including all streams: Skills Link, Career Focus, and Summer Work Experience) from 1996 to the most recent year for which data is available.
- 100% of individuals who received Aboriginal Skills and Employment Training Strategy and Skills and Partnership Fund (including participants from the predecessor programs, the Aboriginal Human Resources Development Agreements and the Aboriginal Skills and Employment Partnerships, from 1996 to the most recent available).

Employment Insurance Beneficiaries with no intervention (Pool of Comparison Cases):

- 20% of individuals who received Regular Employment Insurance benefits, but had no Employment Benefits and Support Measures participation under the Labour Market Development Agreements from 1996 to the most recent year for which data is available for the following jurisdictions: Quebec, Ontario, Manitoba, Saskatchewan, Alberta and British Columbia.
- 50% of individuals who received Regular Employment Insurance benefits but had no Employment Benefits and Support Measures participation under the Labour Market Development Agreements from 1996 to the most recent year for which data is available for the following jurisdictions: Newfoundland, Nova Scotia, and New Brunswick.
- 100% of individuals who received Regular Employment Insurance benefits but had no Employment Benefits and Support Measures participation under the Labour Market Development Agreements from 1996 to the most recent year for which data is available for the following jurisdictions: Prince Edward Island, Yukon, Northwest Territories, and Nunavut.

Reference period:

The reference period depends on the research study or evaluation questions. The data from 1996 up to the most recent year is available for labour market program participants and those from 1990 up to the most recent year is available for Employment Insurance and Canada Revenue Agency administrative files.

Units of the analysis:

- Clients (individuals);
- Interventions:
- Type of intervention (Employment Assistance Services, Skills Development, Targeted Wage Subsidy, etc.);
- Administrative Action plans (associated to the interventions taken by individuals within a certain period);
- Action Plan Equivalents (this concept groups all individual Employment Benefits and Support Measures interventions given to a participant, where the gap between any intervention is no longer than six months);
- Employment Insurance claimants (active, former or uninsured);
- Employment Insurance Claims.

Indicators:

- Employment and unemployment:
- Wages, salaries and other type of earnings;
- Employment Insurance benefits and weeks;
- Social Assistance use.



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Secure Access to Data

Access to the Medium Term Performance Indicator database by approved researchers shall be conducted in accordance with the Department of Human Resources and Skills Development Act, the Department of Social Development Acts and other applicable laws governing the protection of information under its control. Only successful, approved contractors will have access to use the data via secure channels. All personal information is masked and only aggregate findings will be reported. All data will be stored and accessed through ESDC servers.

5. Methodology used for the Net Impact Evaluations

The analytical framework of the Medium Term Performance Indicators is based on an adaptive data processing system developed in-house. This system integrates the previously mentioned administrative databases in order to explore concepts and methodologies that have evolved over the past evaluations. For example, all the analyses in the Labour Market Development Agreements evaluations were conducted using a unit of analysis called Action Plan Equivalent. The Action Plan Equivalent for a participant comprises one or more interventions received with less than six months between the end of one intervention and the start of the next.

The Medium Term Performance Indicators processes generate comprehensive analytical files for non-experimental evaluations of program impacts or other statistical analyses such as participant profiles. The data processing system consists of numerous integrated programs that can be updated with new concepts, econometric techniques, and automated data cleaning processes. The result is a tailored, fully integrated and autonomous system that renders evaluation of the impact of participation over a period of years using econometric techniques such as Difference in Difference and Kernel Matching.

Disaggregating analytical files can potentially provide up to 75 variables. The analytical framework of the project is based on key labour market indicators to provide estimates of incremental program impacts. The estimated labour market indicators include:

- The amount of Employment Insurance benefit received.
- Number of weeks in receipt of Employment Insurance.
- The amount of Social Assistance received.
- Participant earnings from employment.
- Incidence of employment (i.e., incidence of having earnings from employment).
- Level of dependence on income support (i.e., proportion of total income that is from government transfers.

The central limitations of the methodology are:

- Limited number of outcomes for which impacts can be assessed.
- Limited number of control variables to control for participant-comparison group differences.
- Canada Revenue Agency data on earnings that is available only on an annual basis. The Record of Employment might allow breakdowns of data within a year but only for the people who have left jobs.

6. Conclusion

The Medium Term Indicator project is currently used to support evaluation of Employment Benefits and Support Measures delivered under the labour market development agreements. However, the scope of the project has now been expanded to evaluate the relevance and the performance of all other labour market programs.

The Medium Term indicators can also be used to address specific issues and questions selected in consultation with the Skills and Employment Branch, and Provinces and Territories to monitor program design and support program development.



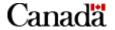
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For example, an analytical file can be created annually to measure incremental program impacts for a specific group of participants and different reference periods, with the results from the national-level analysis reported annually in the Employment Insurance Monitoring and Assessment Reports. The findings from incremental impact studies are useful for policy discussions related to Employment Benefits and Support Measures. Additionally, provinces and territories find the results valuable for their information needs and long-term understanding of the programs. Reporting results also meet the Treasury Board Policy on Results requirements.

The project reduced evaluation costs significantly and improved the responsiveness of evaluations to policy and program needs. It also produces evidence on the effectiveness of Employment Benefits and Support Measures as the methodology enables the attribution of observed effects to program participation.

7. List of examples of completed evaluation projects, technical studies and publications using Medium **Term Performance Indicators database**

- 1. Canadian Journal of Program Evaluation, Volume 32, Fall 2017, Making Evaluation More Responsive to Policy Needs: The Case of the Labour Market Development Agreements. Retrieved from https://evaluationcanada.ca/canadian-journal-program-evaluation/volume-32-2017/fall (English version); https://evaluationcanada.ca/fr/canadian-journal-program-evaluation/volume-32-2017/fall (French version)
- 2. Employment and Social Development Canada. (2017). Effects of the timing of participation in employment assistance services (technical study prepared under the second cycle for the evaluation of the labour market development agreements). Retrieved from http://publications.gc.ca/pub?id=9.834560&sl=0 (English version); http://publications.gc.ca/pub?id=9.834562&sl=0 (French version)
- 3. Statistics Canada Symposium 2016 Growth in Statistical Information: Challenges and Benefits. A Case Study in Administrative Data Informing Policy Development. Retrieved from https://www.statcan.gc.ca/eng/conferences/symposium2016/program/14714-eng.pdf
- 4. Statistics Canada Symposium 2016 Growth in Statistical Information: Challenges and Benefits. Estimating the Impact of Active Labour Market Programs using Administrative Data and Matching Methods. Retrieved from https://www.statcan.gc.ca/eng/conferences/symposium2016/program/14740-eng.pdf
- 5. Statistics Canada Symposium 2016 Growth in Statistical Information: Challenges and Benefits. Estimating the effects related to the timing of participation in employment assistance services using rich administrative data. Retrieved from http://www.statcan.gc.ca/eng/conferences/symposium2016/program/14718-eng.pdf
- 6. Employment and Social Development Canada. (2016). Cost-Benefit Analysis of Employment Benefits and Support Measures (Internal report). Presented at the Annual Conference of the Société Canadienne de Science Economique in Ottawa in May 2017.
- 7. Employment and Social Development Canada. (2015). Analysis of National Employment Benefits and Support Measures Profile, Outcomes and Incremental Impacts for 2007-2008 Participants (Internal report).
- 8. Employment and Social Development Canada. (2017). Gender Based Analysis for 2007-2008 Participants at National level (Internal report).
- 9. Employment and Social Development Canada. (2012). Analysis of National Employment Benefits and Support Measures Profile, Outcomes and Incremental Impacts for 2002-2005 Participants (Internal report).
- 10. Employment and Social Development Canada. (2015). Analysis of National Employment Benefits and Support Measures Profile, Outcomes and Incremental Impacts for the El Claimant Category Long-Tenured Workers (Internal report).



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- 11. Employment and Social Development Canada. (2013). Employment Insurance Monitoring and Assessment Report 2012/13: Incremental impacts over five years post-program for all active and former El claimants who started their EBSM participation between 2002 and 2005. Section III (http://www.esdc.gc.ca/en/reports/ei/monitoring2013/chapter3.page#h2.3)
- 12. Employment and Social Development Canada. (2014). Employment Insurance Monitoring and Assessment Report 2013/14: Incremental impacts over three years post-program for all active and former claimants who started participation in 2007-2008. Section III (http://www.esdc.gc.ca/en/reports/ei/monitoring2014/chapter3.page#h2.30)
- 13. Employment and Social Development Canada. (2015). Employment Insurance Monitoring and Assessment Report 2014/15 National evaluation of Employment Benefits and Support Measures: incremental impacts for the "long-tenured workers" El claimant category and cost-benefit analysis of Employment Benefits and Support Measures. Section III (https://www.canada.ca/en/employment-social-development/programs/ei/eilist/reports/monitoring2015/chapter3.html)
- 14. Employment and Social Development Canada. (2016). Employment Insurance Monitoring and Assessment Report 2013/14: Incremental impacts for 2002-2005 and 2007-2008 Employment Benefits and Support Measures participants at the National level, by age and gender. Section III (https://www.canada.ca/en/employment-social-development/programs/ei/eilist/reports/monitoring2016/chapter3.html)

In addition to the list mentioned above, this database has supported the evaluation work that has been communicated at many forums in 2016, including Statistics Canada's International Methodology Symposium, the Canadian Economic Association annual conference, the Canadian Evaluation Society, the Forum of Labour Market Ministers, the Canadian Research Data Centre Network, and at the Annual Conference of the Société Canadienne de Science Economique in Ottawa in May 2017.



Table 1: Medium Term Indicators data model

Entity name	Population covered	Main data elements	Period covered	Number of observations
Participant's data file. Generated data from participating in different Labour Market Programs	Consists of 100% records of labour market assigned interventions. For each individual, there are as many records as it includes the number of labour market interventions to which he/she was assigned during the observation period.	Sequence number (masked); Intervention start date; Intervention end date; Intervention type; Human Resource Responsibility Centre (HRCC) code; Disability Status; Aboriginal Status; Visible minority; Gender; Birth year; Province; Intervention duration; Intervention outcome code; Education level	1996- 2015	20,259,436
Employment Insurance benefits file - El part I generated data	Provides detailed weekly EI activities for each individual (EI claimant) over the observation period. As the data spans an observation period of 25 years, each individual is monitored for up to 1,300 weeks. Contains information on EI claimants and their benefits (including labour market program participants and non-participants). The EI part I detailed information is available for 100% of EI claimants who are labour market program participants and for 20 to 100% who are non-participants.	Sequence number (masked); Benefit period commencement week; Benefit vector termination week; Claim sequence number; Source File Indicator (indicates whether the EI claim was active or dormant); Weekly benefit amount (amount (\$) of the weekly benefit received by the claimant); Provinces; Aboriginal Indicator; Disabled indicator; Aboriginal Type; Visible Minority Indicator; Gender; Dependents; Age (i.e. the Age of the claimant at the benefit period commencement week); Employment Insurance (EI) economic regions; Occupation code/ National Occupational Classification (NOC); North American Industry Classification System (NAICS) Code; Weekly benefit amount; Insured weeks; Insured Hours; Insured Earnings; Most recent claim status; Most recent claim type (i.e. regular, sickness, maternity, retirement, fishing, paternity); Work sharing weekly hours (indicates the number of work sharing hours that would have been worked in a normal work week); Termination code (This field indicates whether the benefit period has terminated and the reason for the termination.); Earnings period commencement week; Earnings period termination week; Total Benefit Weeks Payable; Total Benefit Paid; Entitlement weeks; New	1990- 2015	240,816,540



Entity name	Population covered	Main data elements	Period covered	Number of observations
		entrant/re-entrant (indicates whether a claimant is a new entrant or re-entrant to the labour force); Weeks paid part II (EI Part II Benefits are intended to assist unemployed Canadians prepare for, obtain and maintain employment); Benefit paid part II (amount of (\$) income support benefits paid under Part II); Reason for Separation (e.g. striker /lockout, return to school, illness, quit etc); Benefit type (indicates the type of benefits received by the claimant); Reason-partial/nil Benefits (In the case of multiple reasons for loss of benefit, the reason for which the greatest reduction was made is given); Benefit amount (Amount of benefits paid, including federal and provincial taxes); Week earnings reported (EI week code for which earnings were reported); Amount earnings (contains the sum of this week's earnings and this weeks' Adult Occupational Training Act (AOTA) Payment); Found work code (indicates whether the claimant has found work); Education level		
Records of Employment (ROE)	Contains longitudinal information on individuals' job separations. It contains 100% ROE for labour market program participants and 20 to 100% ROE for non-participants. Each individual has as many records as the number of times an ROE was issued during the observation period.	Sequence number (masked); Record type; Benefit period commencement; First date worked; First week work; Last date worked; Last week worked; Reason for Separation; Insured earnings; Insured Earnings; Insured Hours; Standard Industrial Classification (SIC) Code; North American Industry Classification System (NAICS) Code	1990- 2015	104,826,220
Tax data file - Income-T1	A T1 tax return record is available for each individual and for each year in which he/she filed an income tax return. It contains detailed income source information for 100% of participants	Sequence number (masked); Marital status; Date of birth; Taxation Year; Province; Postal Code; Immigrant's Date of Entry into Canada; Total employment earnings; Employment Insurance	1990- 2013	161,407,977



Entity name	Population covered	Main data elements	Period covered	Number of observations
	and for 20 to 100% of non-participants.	(EI) income; Employment Insurance (EI); premiums from all T4 slip; Net business income; Net farm income; Net fishing income; Net commission income; Net professional income; Net professional income; Other employment income; Social assistance income; Total income; Pension income; Net spousal income; Net provincial tax reported; Net Federal tax reported		
Tax data file - Income-T4	A T4 supplementary record is issued to an individual for each year in which he/she had a job with a particular employer. Contain earnings data that may or may not be consistent with data from T1 tax returns. T4 detailed information is available for 100% of participants and for 20 to 100% of non-participants.	Sequence number (masked); Tax year; Standard Industrial Classification (SIC) Code; Province; Business number; North American Industry Classification System (NAICS) Code; Canadian Pension earnings; Employment income; Employment Insurance (EI) premiums; Gross earnings; Insured earnings; Postal code	1999- 2013	149,086,238
Canadian Child Tax Benefit file	The Canada Child Tax Benefit (CCTB) is a tax-free monthly payment made to eligible families to help them with the cost of raising children under 18 years of age.	Sequence number (Masked); Children under 7; Children under 18 eligible (Child tax CR); Children under 18; Tax Year; Sex code; Eligible Child Count - Month 1 to Month 12; Universal Child Care Benefit (UCCB) Amount - Month 1 to Month 12; National child Benefit Supplement (NCBS) Monthly Portion - Month 1 to Month 12; Disability Supplement Amount (CDB) - Month 1 to Month 12; Entitlement Amount - Month 1 to Month 12; Payment Amount - Month 1 to Month	1999- 2013	13,121,805





ANNEX "C"

Evaluation Criteria

Mandatory Requirement										
Requirement Number	Description (s)	Page No. / Paragraph no.	Compliant / Not Compliant							
M-1	The bidder MUST submit a Curriculum Vitæ for each proposed personnel.									
M-2	The bidder's proposal MUST be national in scope (no provincial/territorial dimension)									
M-3	The bidder's proposal MUST not exceed the maximum allocated budget of \$ 125,000 (excluding all applicable taxes).									



	Technical Merit		
	Description	Minimum Points Required	Maximum Points
1.Understanding of objectives	and issues		
points available) o Demonstrates litt Demonstrates m Demonstrates su Demonstrates ex Demonstrate understand available) Demonstrates litt	tle understanding (0-5 pts) oderate understanding (6-10)pts ufficient understanding (11-15 pts) occellent understanding (16-20 pts) ing of administrative data to be used (10 points alle understanding (0-3 pts) ufficient understanding (4-7 pts)	21	30
o Demonstrates ex	ccellent understanding (8-10 pts)		
Little reference to Sufficient reference to Sufficient reference to Excellent description Excellent description Describes proposed emporal Extellent description Sufficient description	elevant literature (5 points available) o relevant literature (0-2 pts) nce to relevant literature (3-4 pts) nce to relevant literature (5 pts) derpinning (5 points available) of theoretical underpinning (0-2 pts) otion of theoretical underpinning (3-4 pts) otion of theoretical underpinning (5 pts) orical approach (10 points available) of empirical approach (0-3 pts) otion of empirical approach (4-7 pts) otion of empirical approach (8-10 pts)	13	20
available) O Proposal fills little O Proposal fills suffice Indicates the proposed leavailable) O Proposal provide and staff member O Proposal provide task and staff member ask and staff member as	s moderate information on proposed level of effort by ember (4-6 pts) s sufficient information on proposed level of effort by ember (7-8 pts) s detailed information on proposed level of effort by	14	20



	Total (Technical Merit)	65	100
0	Proposal demonstrates excellent relevance to labour market policy (25-30 pts)		
0	Proposal demonstrates sufficient relevance to labour market policy (17-24pts)		
0		17	30
• Demoi	nstrates relevance for labour market program policy (30) Proposal demonstrates little relevance to labour market policy (0-8 pts)		



ANNEX "D"

Security Requirements Check List

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113	1	Œ

Government of Canada

Gouvernement du Canada

Contract Number / Numbro du contrat
Security Classification / Classification de sécurité

ð	ART A/Continue (IVARTIE A/Sullo) Will the supplier eig or access to Price ted end/or CLASSIFIED COMSEC Information or essets? Le fournisseur aura-t-il accès à des ranselgnements ou à des blens COMSEC désignés PROTÈGÉS et/ou CLASSIFIÉS? If Yes, indicate the level of sensitivity: Dans l'affi; utyradig uerte niveau de sensibilité :	No Yes Non Ou
F	9. Will the supplier require access to extramely sensitive: Le fournisseur aura-1-11 accès à des renseignements ou à des blens INFOSEC de nature extrêmement délicate?	No Yes
	Short Tillo(s) of material / Titre(s) abrégé(s) du matériol ; Document Number / Numéro du document :	
1	PARTIE - RECONNEL (SUPPLIER) / PARTIE - B - PERSONNEL (FOURSEUR): 10. a) Personnal security screening level required / Niveau de contrôle de la sécurité du personnel requis	
	RELIABILITY STATUS CONFIDENTIAL SECRET TOP SECRET TRÈS SEC	
		TOP SECRET
	SITE ACCESS ACCES AUX EMPLACEMENTS	
	Special comments Communicires spéciaux :	
	NOTE: Il multiple tovois di screening are identified, a Security Classification Guida must be provided REMARQUE : St eurs niveaux de contrôte de sécurité scaphuls was de de classification de la sécurité delli étre	fourni
	10. b) May unscreened personnel is used for portions of the work? Ou personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? If Yes, will unscreened personnel be escorted?	V Nen Ou No Yes
	Dans l'affirmativo, le porsonnet en question sera-t-il escorté?	Non LOU
	PART C=SAFEGUARDS (SUPPLIER) / PARTIE C= MESURES DE PROTECTION (FOURMSSELVE 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-it tenu de recevoir et d'antreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS?	No Yes
	11 b) Will the supplier to required to safeguard COMSEC information or assets? Le fournisseur sera-t-it tenu de proléger des renselgnements ou des blens COMSEC?	No Yes
	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 sits or premises? Les installations du formisseur serviront-alles à la production (fabrication at/ou réparation at/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?	Non Yes
_	INFORMATION TECHNOLOGY (IT) MEDIA / BUPPORT RELATIF A 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-I-II fenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des	No Yes
	ransolgnemants ou des données PROTÉGÉS eVou CLASSIFIÉS?	
	11 e) Will there be an electronic link between the supplier's IT systems and the government department or agency? Disposers-t-on d'un iten électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale?	Non Yes
	TDS/SCT 350-103(2004/12) Security ClassMication / Classification de sécurité	-

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Government Gouvernement of Canada du Canada

Contract Number / Numéro du contrat	
ocurity Classification / Classification de sécurité	

SECURITY REQUIREMENTS CHECK LIST (SRCL)

A PARTICIPATION DE PLANTAGE IN ANTI-ONE PLANTAGE MATERIAL PROCESSA	LISTE DE VERIF	ICATION DES EXIGENCES	RELATIVES A LA SE	CURITE (LVERS)	-
Ministative ou organishme gouvernemental diretifies associated and substitution of the control o	PART/ATCONTRACT/INFORMATION / PARTIE	AT INFORMATION CUNTRACT	2 Reanch e	r Directorale / Direction pénér	rate ou Direction
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Brief Description of Work / Brave description du travail Conducting labour market research/envisuation work safe masked program administrative data. Access to data will be only be via access to an ESDC protected secure server within or possibility to copy or shows the data netated the serve environment. It is within the supplier require access to Controlled Goods? Le fournisseur aumy-til acces à des marchandises contrôlées? Le fournisseur aumy-til accès à des marchandises contrôlées? Le fournisseur aumy-til accès à des marchandises contrôlées? Le fournisseur aumy-til accès à des données techniques militaires non classifiéos qui sont assujeilles au dispositions du Règlement sur la contrôle des données techniques? Le fournisseur aumy-til accès à des données techniques militaires non classifiéos qui sont assujeilles au dispositions du Règlement sur la contrôle des données techniques? Le fournisseur aumy-til accès des contrôles access to PROTECTED andor CLASSIFIÉD Information or assets? Non Ves Le fournisseur ainsi que les employés auronités access to PROTECTED andor CLASSIFIÉS? (Specif y the fevel of access us ingigle duch aft in Custation 7, c) (Précisar la nivane d'accès en utilisant le tableau qui se trouve à la question 7, c) (Précisar la nivane d'accès en utilisant le tableau qui se trouve à la question 7, c) (Précisar la nivane d'accès en utilisant le tableau qui se trouve à la question 7, c) (Précisar la nivane d'accès en utilisant le tableau qui se trouve à la question 7, c) (Précisar la nivane d'accès en utilisant le tableau qui se trouve à la question 7, c) (Précisar la nivane d'accès en utilisant le tableau qui se trouve à la question 7, c) (Précisar la nivane d'accès en utilisant le tableau qui se trouve à la question 7, c) (Précisar la nivane d'accès en utilisant le tableau qui se trouve à la question 7, c) (Précisar la nivane d'accès en utilisant le tableau qui se trouve à la question 7, c) (Précisar la nivane d'accès en utilisant le tableau qui se trouve à la question 7, c) (Précisar la nivane d'a			n and Address of Subcor	iractor / Nom al adressa du se	misdeallani
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b) Will the supplier equire access to unclassified military technical data subject to the provisions of the Technical Data Centrol	5. a) was the supplier require access to Constitue	lises contrôlées?		1	
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i. a) Will the supplior and its employee's require accass to PROTECTED and/or CLASSIFIED Information or assets? Le fournisseur ainsi que les employés auront-les accès à des renseignements ou à dos biens PROTEGES ellou CLASSIFIÉS? (Specify the level of accoss using the chart in Cuestion 7. c.) (Prictiser la niveau d'accès an utilisent le tableau qui se trouve à la question 7. c.) (Prictiser la niveau d'accès an utilisent le tableau qui se trouve à la question 7. c.) (Prictiser la niveau d'accès an utilisent le tableau qui se trouve à la question 7. c.) (Prictiser la niveau d'accès an utilisent le tableau qui se trouve à la question 7. c.) (Prictiser la niveau d'accès an utilisent le tableau qui se trouve à la question 7. c.) (Prictiser la niveau d'accès an utilisent le tableau qui se trouve à la question 7. c.) (Prictiser la niveau d'accès an utilisent le tableau qui se trouve à la question 7. c.) (Prictiser la niveau d'accès an utilisent le tableau qui se trouve à la question 7. c.) (Prictiser la niveau d'accès an utilisent le tableau qui se trouve à la question 2. c.) (Prictiser la niveau d'accès an utilisent le tableau qui se trouve à la question 7. c.) (Prictiser la niveau d'accès an utilisent le tableau qui se trouve à la question 7. c.) (Prictiser la niveau d'accès an utilisent le tableau qui se trouve à la que d'accès an utilisent le tableau qui se trouve à la que d'accès an utilisent le tableau qui se trouve à la que d'accès an utilisent le tableau qui se trouve à la que d'accès an utilisent le tableau qui se trouve à la que d'accès an utilisent le tableau qui se trouve d'accès an utilisent le tableau qui se trouve à la que d'accès restriction accès le des parties à la que d'accès an utilisent le tableau qui se trouve à la que d'accès arestriction accès de la que d'accès arestriction accès à des zanes d'accès restrictions au que la faccès arestriction accès à des zanes d'accès restriction accès à des zanes d'accès arestriction accès d'accès arestriction accès d'accès accès à des zanes d'accès arestricti	sur le contrôle des données techniques?				
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14. Organization Security Authority /	Responsable de la séc	urité de l'orga	nisma		2011-12-01	
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