

RETURN BIDS TO:

RETOURNER LES SOUMISSIONS À:

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

Cabot Place, Phase II, 2nd Floor

Box 4600

St. John's, NL

A1C 5T2

Bid Fax: (709) 772-4603

Request For a Standing Offer Demande d'offre à commandes

Regional Individual Standing Offer (RISO)

Offre à commandes individuelle régionale (OCIR)

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

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

Comments - Commentaires

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

Issuing Office - Bureau de distribution

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

Title - Sujet SO Vocational Rehabilitation	
Solicitation No. - N° de l'invitation G9292-214643/A	Date 2020-04-22
Client Reference No. - N° de référence du client G9292-214643	GETS Ref. No. - N° de réf. de SEAG PW-\$X AQ-021-7420
File No. - N° de dossier X AQ-9-42128 (021)	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2020-06-04	Time Zone Fuseau horaire Newfoundland Daylight Saving Time NDT
Delivery Required - Livraison exigée See Herein	
Address Enquiries to: - Adresser toutes questions à: Lacey (X AQ), Rhonda	Buyer Id - Id de l'acheteur xaq021
Telephone No. - N° de téléphone (709)730-1597 ()	FAX No. - N° de FAX (709)772-4603
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: EMPLOYMENT AND SOCIAL DEVELOPMENT CANADA PORTAGE IV LVL 1 140 PROMENADE DU PORTAGE GATINEAU Quebec K1A0J9 Canada	
Security - Sécurité This request for a Standing Offer does not include provisions for security. Cette Demande d'offre à commandes ne comprend pas des dispositions en matière de sécurité.	

Instructions: See Herein

Instructions: Voir aux présentes

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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Amd. No. - N° de la modif.
File No. - N° du dossier
Xaq-9-42128

Buyer ID - Id de l'acheteur
xaq021
CCC No./N° CCC - FMS No./N° VME

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PART 1 - GENERAL INFORMATION

1.1 Introduction

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

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

7A, includes the Standing Offer containing the offer from the Offeror and the applicable clauses and conditions;

7B, includes the clauses and conditions which will apply to any contract resulting from a call-up made pursuant to the Standing Offer. |

The Annexes include the Requirement, the Basis of Payment, the Electronic Payment Instruments, the Federal Contractors Program for Employment Equity - Certification and any other annexes.

The Phased Bid Compliance Process applies to this requirement.

1.2 Summary

Public Services and Procurement Canada (PSPC) on behalf of Employment and Social Development Canada, has a requirement to establish Regional Individual Standing Offers for the provision of Vocational Rehabilitation Services in Atlantic, Western and Ontario Regions.

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

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

ONTARIO

Area 1

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

Area 2

- Bruce
- Grey
- Huron

Area 3

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

Area 4

- Halton
- Dufferin
- Wellington
- Waterloo
- Brant

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File No. - N° du dossier
XAQ-9-42128

Buyer ID - Id de l'acheteur
xaq021
CCC No./N° CCC - FMS No./N° VME

- Hamilton
- Niagara
- Haldimand

Area 5

- Peel
- York
- Toronto
- Durham

Area 6

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

Area 7

- Cochrane
- Sudbury
- Greater Sudbury
- Manitoulin
- Algoma

Area 8

- Kenora
- Rainy River
- Thunder Bay

ATLANTIC

Area 9

- Newfoundland (entire Province)

Area 10

- Nova Scotia & Prince Edward Island (entire Province)

Area 11

- New Brunswick (entire Province)

Area 12

- Manitoba (entire Province)

Area 13

- Saskatchewan (entire Province)

Area 14

- Alberta

- 14.1 – Medicine Hat, Lethbridge, Calgary, Lake Louise, Banff, Drumheller, Red Deer, Rocky Mountain House and surrounding areas, as well as, East Kootenays in BC.
- 14.2 – Edmonton, Grande Prairie, Peace River, High Level, Jasper, Edson, Fort McMurray and surrounding area

Area 15

•British Columbia

- 15.1 - Greater Vancouver / Fraser Valley (east to Surrey and Port Coquitlam, north to Sechelt and Pemberton and from Maple Ridge/Langley to Hope)
- 15.1b– additional points will be awarded if the bidder indicates willingness to travel to 7.1b : Caribou / Northern BC (Williams Lake area North)
- 15.2- Vancouver Island (including Powell River and the Gulf Islands)
- 15.3- Okanagan (including Kamloops in the west as well as West Kootenays)

Period of Standing Offer:

The period of the standing offer will be one year from date of issuance to 31 March 2021 and will include two separate and additional one year extension periods.

Overall value: \$ 1,895,200.00 HST included

For additional information, please refer to Annex "A"— Statement of Work. The requirement is limited to Canadian Services.

1.3 Debriefings

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

1.4 Anticipated migration to an e-Procurement Solution (EPS)

Canada is currently developing an online EPS for faster and more convenient ordering of goods and services. In support of the anticipated transition to this system and how it may impact any resulting Standing Offer that is issued under this solicitation, refer to 7.15 Transition to an e-Procurement Solution (EPS).

The Government of Canada's [press release](#) provides additional information.

PART 2 - OFFEROR INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

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

The [2006](#) (2019-03-04) Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the RFSO.

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

Delete: 60 days
Insert: 120 days

2.1.1 SACC Manual Clauses

SACC Manual Clause [M0019T](#) (2007-05-25), Firm Prices and/ or Rates

2.2 Submission of Offers

Offers must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated in the RFSO.

Rhonda Lacey
A/ Senior Supply Officer
Public Services and Procurement Canada
The John Cabot Building
10 Barter's Hill, St. John's, NL A1C 5T2

or

Electronic submissions may be sent to:

PWGSC Bid Receiving Unit in Newfoundland and Labrador:

TPSGC.RAReceptionSoumissionsTNL-ARBidReceivingNL.PWGSC@tpsgc-pwgsc.gc.ca

Note: Offers will not be accepted if emailed directly to this email address. This email address is to be used to open an epost Connect conversation, as detailed in Standard Instructions [2006](#), or to send offers through an epost Connect message if the bidder is using its own licensing agreement for epost Connect.

or

Facsimile submissions may be faxed to :
(709) 772-4603

2.3 Former Public Servant

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

Definitions

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

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

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

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

Former Public Servant in Receipt of a Pension

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

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

- a. name of former public servant;
 - b. date of termination of employment or retirement from the Public Service.
- By providing this information, Offerors agree that the successful Offeror's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with [Contracting Policy Notice: 2012-2](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

Work Force Adjustment Directive

Is the Offeror a FPS who received a lump sum payment pursuant to the terms of the Work Force

Adjustment Directive? **YES () NO ()**

If so, the Offeror must provide the following information:

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

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

2.4 Enquiries - Request for Standing Offers

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

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

2.5 Applicable Laws

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in the location where services are being rendered.

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

PART 3 - OFFER PREPARATION INSTRUCTIONS

3.1 Offer Preparation Instructions

- If the Offeror chooses to submit its offer electronically, Canada requests that the Offeror submits its offer in accordance with section 08 of the 2006 standard instructions. The epost Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation. The offer must be gathered per section and separated as follows:

Section I: Technical Offer

Section II: Financial Offer
Section III: Certifications
Section IV: Additional Information

- If the Offeror chooses to submit its offer in hard copies, Canada requests that the Offeror provides its offer in separately bound sections as follows:

Section I: Technical Offer one (1) hard copy

Section II: Financial Offer one (1) hard copy

Section III: Certifications one (1) hard copy

Section IV: Additional Information one (1) hard copy

If there is a discrepancy between the wording of the soft copy on electronic media and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

- If the Offeror is simultaneously providing copies of its offer using multiple acceptable delivery methods, and if there is a discrepancy between the wording of any of these copies and the electronic copy provided through epost Connect service, the wording of the electronic copy provided through epost Connect service will have priority over the wording of the other copies.

Prices must appear in the financial offer only, located in Annex "C"—Basis of Payment. No prices must be indicated in any other section of the offer.

Canada requests that offerors follow the format instructions described below in the preparation of hard copy of their offer:

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

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](https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573) (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573>). To assist Canada in reaching its objectives, Offerors should:

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

Section I: Technical Offer

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

Section II: Financial Offer

Offerors must submit their financial offer in accordance with Annex "B- Basis of Payment. The total amount of applicable taxes must be shown separately, if applicable.

3.1.1 Electronic Payment of Invoices - Offer

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

If Annex "G" 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.

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

Section IV: Additional Information

3.1.2 Offeror's Proposed Sites or Premises Requiring Safeguarding Measures

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

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

City, Province, Territory / State

Postal Code / Zip Code

Country

3.1.2.2 The Company Security Officer must ensure through the [Contract Security Program](#) that the Offeror and proposed individual(s) hold a valid security clearance at the required level, as indicated in Part 6 – Security, Financial and Other Requirements.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

Canada will use the Phased Bid Compliance Process described below.

4.1.1 Phased Bid Compliance Process

4.1.1.1 (2018-07-19) General

- (a) Canada is conducting the PBCP described below for this requirement.
- (b) Notwithstanding any review by Canada at Phase I or II of the PBCP, 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 PBCP 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) Canada may, in its discretion, request and accept at any time from a Bidder and consider as part of the Bid, any information to correct errors or deficiencies in the Bid that are clerical or administrative, such as, without limitation, failure to sign the Bid or any part or to checkmark a box in a form, or other failure of format or form or failure to acknowledge; failure to provide a procurement business number or contact information such as names, addresses and telephone numbers; inadvertent errors in numbers or calculations that do not change the amount the Bidder has specified as the price or of any component thereof that is subject to evaluation. 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. The Bidder will have the time period specified in writing by Canada to provide the necessary documentation. Failure to meet this deadline will result in the Bid being declared non-responsive.
- (d) The PBCP does not limit Canada's rights under Standard Acquisition Clauses and Conditions (SACC) 2003 (2019-03-04) 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 (2018-03-13) 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 (2018-03-13) 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 PBCP. Mandatory technical criteria that are not identified in the solicitation as being subject to the PBCP, 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 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 (2018-03-13) 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 (2017-07-31) Technical Evaluation

4.1.2.1 Mandatory Technical Criteria

See Annex B—Evaluation

The Phased Bid Compliance Process will apply to all mandatory technical criteria.

4.1.2.2 Point Rated Technical Criteria

See Annex B—Technical Criteria

- | | |
|--|-----------|
| 1) Education/training/certification: Vocational Rehabilitation Consultant | 35 points |
| 2) Related Experience of Proposed: Vocational Rehabilitation Consultant(s) | 45 points |
| 3) Demonstrated ability to provide immediate and in person services | 20 points |
| 4) Demonstrated Network for Specialized Assessments | 5 points |

5) Accessibility	5 points
6) Case Study (see Appendix A)	40 points
Total	150 points

4.1.2.2 Point Rated Technical Criteria

4.2 Evaluation Procedures

- (a) Offers will be assessed in accordance with the entire requirement of the Request for Standing Offers including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the offers.

4.2.1 Financial Evaluation

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

4.2.2.1 Firm Price and/or Rates

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

4.2.2.2 Evaluation of Price

SACC Manual Clause [M0220T](#) (2016-01-28), Evaluation of Price-Bid

4.3 Basis of Selection

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

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria; and
 - c. obtain the required minimum of 105 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 150 points.
2. Bids not meeting "(a) or (b) or (c)" will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.

6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.

7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

4.3.2 Number of Offers

It is anticipated that up to 3 offers will be recommended for award in each area.

4.3.3 Issuance of Offers

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

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

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

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

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

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

5.1 Certifications Required with the Offer

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

5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all offerors must provide with their offer, **if applicable**, the declaration form available on 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.

5.1.2.1 Canadian Content Certification

This procurement is limited to Canadian services.

The Offeror certifies that:

() the services offered are Canadian services as defined in paragraph 4 of clause [A3050T](#).

For more information on how to determine the Canadian content for a mix of goods, a mix of services or a mix of goods and services, consult [Annex 3.6](#), Example 2, of the Supply Manual.

5.1.2.1.1 SACC Manual clause [A3050T](#) (2018-12-06) Canadian Content Definition

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

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

5.2.1 Integrity Provisions – Required Documentation

In accordance with the section titled Information to be provided when bidding, contracting or entering into a real property agreement of the [Ineligibility and Suspension Policy](#) (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Offeror must provide the required documentation, as applicable, to be given further consideration in the procurement process.

5.2.2 Federal Contractors Program for Employment Equity - Standing Offer Certification

By submitting an offer, the Offeror certifies that the Offeror, and any of the Offeror's members if the Offeror is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list) available at the bottom of the page of the [Employment and Social Development Canada-Labour's](#) website (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#s4>).

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

5.2.3 Additional Certifications Precedent to Issuance of a Standing Offer

5.2.3.1 Workers Compensation Certification- Letter of Good Standing

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

The Bidder must provide, within five (5) days following a request from the Contracting Authority, a certificate or letter from the applicable Workers' Compensation Board confirming the Bidder's good standing account. Failure to comply with the request may result in the bid being declared non-responsive.

5.2.3.2 Status and Availability of Resources

SACC Manual Clause M3020T (2016-01-28) Status of Availability of Resources

PART 6 - SECURITY, FINANCIAL AND INSURANCE REQUIREMENTS

6.1 Security Requirements

1. Before issuance of a standing offer, the following conditions must be met:
 - (a) the Offeror must hold a valid organization security clearance as indicated in Part 7A - Standing Offer;
 - (b) the Offeror's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 7A - Standing Offer;
 - (c) the Offeror must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
 - (d) the Offeror's proposed location of work performance and document safeguarding must meet the security requirements as indicated in Part 7A - Standing Offer;
 - (e) the Offeror must provide the addresses of proposed sites or premises of work performance and document safeguarding as indicated in Part 3 - Section IV Additional Information.
2. Offerors are reminded to obtain the required security clearance promptly. Any delay in the issuance of a standing offer to allow the successful Offeror to obtain the required clearance will be at the entire discretion of the Standing Offer Authority.
3. For additional information on security requirements, offerors 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 Insurance Requirements

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

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

PART 7 - STANDING OFFER AND RESULTING CONTRACT CLAUSES

A. STANDING OFFER

7.1 Offer

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

7.2 Security Requirements.

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

7.2.2 Offeror's Sites or Premises Requiring Safeguarding

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid Designated Organization Screening (DOS) with approved Document Safeguarding at the level of PROTECTED B, issued by the Canadian Industrial Security Directorate (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.

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 Appendix M (electronic attachment);

(b) Industrial Security Manual (Latest Edition)

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

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

- 7.2.2.2 The Company Security Officer must ensure through the [Contract Security Program](#) that the Offeror and individual(s) hold a valid security clearance at the required level.

7.3 Standard Clauses and Conditions

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

7.3.1 General Conditions

[2005](#) (2017-06-21) General Conditions - Standing Offers - Goods or Services, apply to and form part of the Standing Offer.

7.3.2 Standing Offers Reporting

The Offeror must compile and maintain records on its provision of goods and services to Canada under contracts resulting from the Standing Offer. This data must include all purchases done by Canada, including those acquired and paid for by Canada acquisition cards.

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

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

The quarterly reporting periods are defined as follows:

- first quarter: April 1 to June 30
- second quarter: July 1 to September 30
- third quarter: October 1 to December 31
- fourth quarter: January 1 to March 31

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

7.4 Term of Standing Offer

7.4.1 Period of the Standing Offer

The period for making call-ups against the Standing Offer will be one year from date of issuance to March 31, 2021.

7.4.2 Extension of Standing Offer

If the Standing Offer is authorized for use beyond the initial period, the Offeror offers to extend its offer for an additional two, 1 year periods, at April 1, 2021 and April 1, 2022 under the same conditions and at the rates or prices specified in the Standing Offer, or at the rates or prices calculated in accordance with the formula specified in the Standing Offer.

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

7.4.4 Delivery Points

Delivery of the requirement will be made to delivery point(s) specified in the individual call- up document. Potential points of delivery include those specified under section 1.2 Summary.

7.5 Authorities

7.5.1 Standing Offer Authority

The Standing Offer Authority is:

Rhonda Lacey
A/ Senior Contracting Officer
Public Works and Government Services Canada
Acquisitions Branch
6th Floor, Johns Cabot Building
St. John's NL A1C 5T2

Telephone: 709-730-1597
Facsimile: 709-772-4603
E-mail address: rhonda.lacey@pwgsc-tpsgc.gc.ca

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

7.5.2 Project Authority

The Project Authority for the Standing Offer is identified in the call- up against the Standing Offer.

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

7.5.3 Offeror's Representative (to be completed by the Offeror)

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.

Solicitation No. - N° de l'invitation
G9292-214643/A
Client Ref. No. - N° de réf. du client
G9292-214643

Amd. No. - N° de la modif.
File No. - N° du dossier
XAQ-9-42128

Buyer ID - Id de l'acheteur
xaq021
CCC No./N° CCC - FMS No./N° VME

7.7 Identified Users

The Identified User authorized to make call-ups against the Standing Offer is: Employment and Social Development Canada (ESDC).

7.8 Call-up Procedures

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

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

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

NOTE:

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

Example:

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

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

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

Call-ups will be issued as per proportions above.

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

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

Call-ups will be issued as per proportions above.

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

Example:

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

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

7.9 Call-up Instrument

The Work will be authorized or confirmed by the Identified User(s) using the duly completed forms or their equivalents as identified in paragraphs 2 and 3 below, or by using Canada acquisition cards (Visa or MasterCard) for low dollar value requirements.

1. Call-ups must be made by Identified Users' authorized representatives under the Standing Offer and must be for goods or services or combination of goods and services included in the Standing Offer at the prices and in accordance with the terms and conditions specified in the Standing Offer.
2. Any of the following forms could be used which are available through [PWGSC Forms Catalogue](#) website:
 - PWGSC-TPSGC 942 Call-up Against a Standing Offer
 - PWGSC-TPGSC 942-2 Call-up Against a Standing Offer - Multiple Delivery
 - PWGSC-TPSGC 944 Call-up Against Multiple Standing Offers (English version)
 - PWGSC-TPSGC 945 Commande subséquente à plusieurs offres à commandes (French version)

or

3. An equivalent form or electronic call-up document which contains at a minimum the following information:
 - standing offer number;
 - statement that incorporates the terms and conditions of the Standing Offer;
 - description and unit price for each line item;
 - total value of the call-up;
 - point of delivery;
 - confirmation that funds are available under section 32 of the Financial Administration Act;
 - confirmation that the user is an Identified User under the Standing Offer with authority to enter into a contract.

7.10 Limitation of Call-ups

Individual call-ups against the Standing Offer must not exceed \$40,000.00 (Applicable Taxes included).

7.11 Financial Limitation

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

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

7.12 Priority of Documents

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

- a) the call up against the Standing Offer, including any annexes;
- b) the articles of the Standing Offer;
- c) the general conditions 2005(2017-06-21), General Conditions - Standing Offers - Goods or Services
- d) the general conditions 2010B(2018-06-21), General conditions: Professional services (medium complexity)
- e) Annex A, Statement of Work;
- f) Annex B, Evaluation;
- g) Annex C, Basis of Payment;
- h) Annex D, Security Requirements Check List;
- i) Annex E, Insurance Requirements;
- j) Annex F, Standing Offer Business Volume Report;
- k) the Offeror's offer dated _____ (*insert date of offer*), (*if the offer was clarified or amended, insert at the time of issuance of the offer: "as clarified on _____" or "as amended on _____" and insert date(s) of clarification(s) or amendment(s) if applicable*).

7.13 Certifications and Additional Information

7.13.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Offeror with its offer or precedent to issuance of the Standing Offer (SO), and the ongoing cooperation in providing additional information are conditions of issuance of the SO and failure to comply will constitute the Offeror in default. Certifications are subject to verification by Canada during the entire period of the SO and of any resulting contract that would continue beyond the period of the SO.

7.13.3 SACC Manual Clauses

SACC Manual Clause A0285C (2007-05-25) Workers Compensation
SACC Manual Clause M3020T (2016-01-28) Status of Availability of Resources
SACC Manual Clause M3060C (2008-05-12) Canadian Content Certification

7.14 Applicable Laws

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in location where services are being rendered.

7.15 Transition to an e-Procurement Solution (EPS)

During the period of the Standing Offer, Canada may transition to an EPS for more efficient processing and management of individual call-ups for any or all of the SO's applicable goods and services. Canada reserves the right, at its sole discretion, to make the use of the new e-procurement solution mandatory.

Canada agrees to provide the Offeror with at least a three-month notice to allow for any measures necessary for the integration of the Offer into the EPS. The notice will include a detailed information package indicating the requirements, as well as any applicable guidance and support.

If the Offeror chooses not to offer their goods or services through the e-procurement solution, the Standing Offer may be set aside by Canada.

B. RESULTING CONTRACT CLAUSES

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

7.1 Requirement

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

7.2 Standard Clauses and Conditions

7.2.1 General Conditions

2010B (2018-06-21), General Conditions - Professional Services (Medium Complexity) apply to and form part of the Contract.

7.2.2 Supplemental General Conditions

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

7.2.3 SACC Manual Clause **A9122C** (2008-05-12), Protection and Security of Data Stored in Databases

1. The Contractor must ensure that all the databases containing any information related to the Work are located in Canada or, if the Contracting Authority has first consented in writing, in another country where:
 - a. equivalent protections are given to personal information as in Canada under legislation such as the [Privacy Act](#), R.S. 1985, c.P-21, and the [Personal Information Protection and Electronic Documents Act](#), S.C. 2000, c.5, and under any applicable policies of the Government of Canada; and
 - b. the laws do not allow the government of that country or any other entity or person to seek or obtain the right to view or copy any information relating to the Contract without first obtaining the Contracting Authority's written consent.

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

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

3. The Contractor must ensure that all databases on which any data relating to the Contract is stored are physically and logically independent (meaning there is no direct or indirect connection of any kind) from all other databases, unless those databases are located in Canada (or in another country approved by the Contracting authority under subsection 1) and otherwise meet the requirements of this article.
4. The Contractor must ensure that all data relating to the Contract is processed only in Canada or in another country approved by the Contracting Authority under subsection 1.
5. The Contractor must ensure that all domestic network traffic (meaning traffic or transmissions initiated in one part of Canada to a destination or individual located in another part of Canada) is routed exclusively through Canada, unless the Contracting Authority has first consented in writing to an alternate route. The Contracting Authority will only consider requests to route domestic traffic through another country that meets the requirements of subsection 1.
6. Despite any section of the General Conditions relating to subcontracting, the Contractor must not subcontract (including to an affiliate) any function that involves providing a subcontractor with access to any data relating to the Contract unless the Contracting Authority first consents in writing.

7.3 Term of Contract

7.3.1 Period of the Contract

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

7.4 Proactive Disclosure of Contracts with Former Public Servants

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

7.5 Payment

7.5.1 Basis of Payment

The Contractor will be paid firm rates, as per Annex "C" – Basis of Payment, for work performed in accordance with the Contract. Customs duties are included and Applicable Taxes are extra, if applicable.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

7.5.2 Limitation of Expenditure

7.5.2 Limitation of Price

SACC Manual clause [C6000C](#) (2017-08-17), Limitation of Price

7.5.3 Multiple Payments

SACC Manual clause [H1001C](#) (2008-05-12), Multiple Payments

7.5.4 SACC Manual Clauses

SACC Manual clause [A9117C](#) (2007-11-30) - Direct Request by Customer Department

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

7.5.5 Electronic Payment of Invoices – Call-up

(As per the information provided by the Bidder in Annex G- Electronic Payment Instruments. This clause will be revised accordingly upon issuance of a Standing Offer.)

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

- a. Visa Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI);
- e. Wire Transfer (International Only);
- f. Large Value Transfer System (LVTS) (Over \$25M)

7.6 Invoicing Instructions

1. The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed. Each invoice must be supported by:
 - a. a copy of time sheets to support the time claimed;
 - b. a copy of the 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.

7.7 Insurance – Specific Requirements

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

7.8 SACC Manual Clauses

A9068C (2010-01-11) Government Site Regulations.
A0285C (2007-05-25) Workers Compensation
A7017C (2008-05-12) Replacement of Specific Individuals

Specific Person(s)

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

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

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

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

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

OFFEROR CONTACTS:

TECHNICAL:

Name: _____

Phone: _____

Fax: _____

e-mail: _____

INVOICING:

Name: _____

Phone: _____

Fax: _____

e-mail: _____

7.10 Inspection and Acceptance

The Project Authority is the Inspection Authority. All reports, deliverable items, documents, goods and all services rendered under the Contract are subject to inspection by the Inspection Authority or representative. Should any report, document, good or service not be in accordance with the requirements of the Statement of Work and to the satisfaction of the Inspection Authority, as submitted, the Inspection Authority will have the right to reject it or require its correction at the sole expense of the Contractor before recommending payment.

ANNEX "A"

STATEMENT OF WORK

TITLE:

Provision / Coordination of Vocational Rehabilitation Services to Canada Pension Plan Disability (CPPD) Beneficiaries

1.0 OBJECTIVES:

The objectives to be achieved by the service provider are:

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

2.0 BACKGROUND:

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

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

The CPPD VR program was established to provide individualized, reasonable and cost-effective rehabilitation services to beneficiaries with all types of disabilities, whose medical condition is stable and who have a reasonable expectation of successfully returning to work at the substantially gainful level as defined by [section 68.1 of the Canada Pension Plan Regulations \(http://laws-lois.justice.gc.ca/eng/regulations/C.R.C., c. 385/page-11.html?txthl=68#s-68\)](http://laws-lois.justice.gc.ca/eng/regulations/C.R.C., c. 385/page-11.html?txthl=68#s-68).

The two sections of the CPP Regulations that govern the delivery of the vocational rehabilitation program are [Section 69 \(2\) \(http://laws-lois.justice.gc.ca/eng/regulations/C.R.C., c. 385/page-11.html?txthl=69+2#s-69\)](http://laws-lois.justice.gc.ca/eng/regulations/C.R.C., c. 385/page-11.html?txthl=69+2#s-69) and [Section 70 \(http://laws-lois.justice.gc.ca/eng/regulations/C.R.C., c. 385/page-11.html?txthl=70#s-70\)](http://laws-lois.justice.gc.ca/eng/regulations/C.R.C., c. 385/page-11.html?txthl=70#s-70).

3.0 SCOPE:

Services are to be provided and coordinated with the goal of assisting CPPD beneficiaries who are approved to participate in VR, in becoming job ready to seek, obtain and sustain gainful employment. The responsibilities are shared between the participant, service provider and Service Canada's VR Case Manager (VRCM).

4.1 SERVICE PROVIDER RESPONSIBILITIES:

- To participate in an orientation session regarding the CPPD VR program and to adhere to the process as explained;
- To ensure that all staff have a current enhanced reliability status;
- To ensure that if providing services in an identified bilingual region, there are staff with the capacity to provide services in both official languages (i.e. French and English);
- To inform Service Canada of any staffing changes that may impact service delivery;
- To ensure that all proposed new staff (including third party sub-contractors) meet the requirements outlined in section 4.3 and provide proof of staff credentials (e.g. CV) and security screening results to the PWGSC contact listed;
- To ensure quality performance of the service provider's staff and any third party sub-contractors;
- To maintain open communication between all parties;
- To ensure quality services are provided;
- To play an objective role throughout the vocational rehabilitation process;
- To involve the participant in location selection for face to face meetings and to ensure that when meeting with the participant outside of their home, the location is accessible to their disability needs;
- To make a recommendation on the rehabilitation potential based on a comprehensive business case including estimated cost of the program;
- To implement the vocational rehabilitation plan and recommendations approved by the Service Canada VRCM;
- To ensure that the vocational rehabilitation plan does not negatively affect the participant's health and well-being;
- To continually assess the participant's vocational rehabilitation potential, identify barriers to successful completion of the vocational rehabilitation plan, and apply appropriate mitigating factors;
- To obtain an updated medical report only when directed by Service Canada;
- To collaborate with the Service Canada VRCM in exploring any cost sharing potential with co-insurers or non-profit agencies and securing the agreement in writing;
- To ensure that no services are initiated prior to receiving the individual contract from Service Canada;
- To pay all **approved** expenses for the rehabilitation program and submit invoices with receipts to Service Canada for reimbursement a minimum of every 30 calendar days;
- To monitor the financial status of the participant's specific call-up to ensure sufficient funds throughout the fiscal year; and
- To report any additional funds that may be required for the vocational plan as soon as they are identified and await an amended contract (if deemed necessary) before proceeding.
-

4.2 SERVICE PHILOSOPHY:

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

- Qualities such as motivation, reliability and resilience are recognized as fundamental requirements for employment success;
- CPPD Beneficiary participation in vocational rehabilitation is voluntary;
- Access to vocational rehabilitation services is not withheld based solely on the nature of the participant's disability, age, length of time on the benefit or area of residence in Canada;
- Participants are guided toward the most direct route to employment based on existing opportunities in the local, regional, and/or national labour markets. A participant's employment options could include a return to the previous position, a modified position, or alternate employment opportunities. In some instances, participants may need to be re-trained for a new position and the service provider, in collaboration with the VRCM, will ensure quality, timely and cost effective interventions in the development of the vocational plan;
- Services are individualized and tailored to each participant's unique needs;
- Flexibility currently available within CPPD policy and legislation, for example allowable earnings, is used to maximize employment success;
- Services are provided with the highest ethical standards and must be accessible by default, in accordance with the *Accessible Canada Act*, its associated regulations and standards, and *Treasury Board Contracting Policy*;
- Services foster independence and participation, and participants have a responsibility to follow through on their vocational rehabilitation plan;
- Efforts are made to identify and address barriers that impact a participant's ability to attend and successfully perform at work;
- Physicians, health care professionals and employers are key partners in addressing health, workplace and accommodation issues;
- Partnerships with co-insurers and other third party payers are sought to improve return to work outcomes for CPPD beneficiaries; and
- Consistent with broader trends in workforce support, a job development approach to job placement is to be considered when supporting participants with significant employment barriers.

4.3 SERVICE PROVIDER STAFF:

Vocational Rehabilitation Consultants

All staff working directly with CPPD beneficiaries require security clearance at an enhanced reliability level, and must meet the minimum work experience and educational attainment as defined in the evaluation criteria. Confirmation of education, experience, valid reliability status, as well as, any asset qualifications of proposed staff must be submitted to the Technical Authority for approval. Proof of Document Safeguarding Capability at the Protected B level and Designated Organization Screening at the Protected B from the Canadian Industrial Security Directorate must be submitted prior to commencing vocational rehabilitation service provider responsibilities.

Mandatory Minimum Criteria

There is a mandatory requirement to provide bilingual services in NB (area 3), and Sudbury, ON (area 7). All proposed staff/consultants must meet the following education requirements and work experience to be eligible for further evaluation:

Vocational Rehabilitation Consultants:

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

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

Proposed staff who do not meet the minimum mandatory requirement (two out of the last three years) will not be considered eligible for the work and will not be evaluated as part of a bidder's proposal. If there is no staff proposed by a bidder that meets the minimum mandatory requirement described above, the bid shall be considered a failed bid.

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

Note: If a contract has been awarded, the service provider is not permitted to add additional staff to the contract; however, they are permitted to replace staff as long as the proposed staff member meets the requirements outlined above. Bidders are instructed to provide a maximum of top five (5) proposed staff for each specific area. If additional CV's are provided by the bidder for a specific area, the first 5 will be evaluated and all others discarded. Bidders should note that by providing less than 5 staff in areas of high demand may result in an overall reduced ranking.

5.0 TASKS:

Upon referral from the Service Canada VRCM, the service provider will deliver vocational rehabilitation services while respecting the agreed to roles of each party as explained in the orientation session. Details of the assessment, planning, and intervention phases will be explained in the orientation session to service

Service Providers will be paid their firm hourly rate only for services provided by approved rehabilitation consultants, up to the maximum hours stipulated within each rehabilitation phase.

Work performed by any other staff member should not be invoiced and will not be paid.

Additional hourly fees for service will only be paid when approval from the Service Canada VRCM is obtained in writing prior to hours worked. Requests for additional hours are performed at no cost.

It must be noted that the assessment, planning, and intervention phases may not always be sequential. If it is determined that a participant may benefit by advancing to a phase without completing the previous phase, this can only be done by receiving approval by the Service Canada VRCM.

The government of Canada strives to ensure that the goods and services it procures are inclusive by design and accessible by default, in accordance with the Accessible Canada Act, its associated regulations and standards and Treasury Board Contracting Policy. Communication with participants and the deliverables produced as part of the scope of work must be in accessible formats. The provision of facilities, tools, and services, and all associated costs to make the components and deliverables accessible will be at the Service Provider's expense.

5.1 ASSESSMENT PHASE:

An initial assessment is required for all CPPD beneficiaries who wish to participate in the Vocational Rehabilitation program. If the necessary information is attainable from a co-insurer or an alternate resource wishing to partner, the Service Canada VRCM may determine that their report may be used.

Initial assessments are conducted in-person at the participant's residence. It is acknowledged that in rare situations:

- In consultation with the participant and with approval of the VRCM, the service provider may conduct the assessment at a different location than the participant's residence. Where applicable, the location must be accessible to the participant and ensure the privacy of the client information.
- Approval must be obtained from the Service Canada VRCM to permit the assessment to be conducted by telephone interview or video conferencing equipment available through the local Service Canada office.

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

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

If further information is required in order to determine the participant's suitability for the VR program or to further determine their needs, specialized assessments may be recommended and conducted by certified professionals.

5.2 PLANNING PHASE:

Upon approval, the service provider, in collaboration with the Service Canada VRCM, will develop a draft IWRP after the completion of the assessment phase.

The final IWRP must be approved by the Service Canada VRCM prior to the implementation of **any** intervention. The plan should be monitored, re-evaluated and adjusted as necessary.

The IWRP must:

- be developed in collaboration with all key stakeholders: participant, Service Canada VRCM, service provider, physician or nurse practitioner, and co-insurer or other partnering agency (as applicable);
- not jeopardize the physical and mental health of the participant;
- identify the total projected cost for each activity, with start dates and expected duration per fiscal year (i.e. April 1st to March 31st);
- include a breakdown of service provider estimated hours of work for each activity paid on an hourly basis;
- include documentation from the training institution that outlines all related training costs;
- include a breakdown of estimated disbursements;
- specify short and long term goals that are specific, measurable, attainable, realistic and timely;
- identify existing and/or potential barriers/problems and ascertain strategies and services needed to reach the goals;
- indicate confirmed dollar amounts of any resources and funding options available to the participant;
- identify the responsibilities of the participant, Service Canada VRCM, the service provider and where applicable, the co-insurer;
- itemize co-insurer/other partnering agency participation including the financial expectations of each party;
- first be approved by the Service Canada VRCM before obtaining signatures of the other stakeholders.

An amended IWRP must be submitted by the service provider when there is a significant change in the participant's health status or a significant change to the original plan is recommended, such as a marked change in occupational direction, training and/or cost. Contact the Service Canada VRCM to discuss the need to amend the IWRP prior to commencing an amended IWRP. Requests for additional hours are performed at no cost.

Additional fees may be paid only where pre-approved by the VRCM and where the amendment is not the result of an error or omission on the part of the service provider. No fees are paid for minor adjustments or amended IWRPs completed without VRCM pre-approval.

5.3 INTERVENTION PHASE:

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

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

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

Case management and service coordination will include:

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

5.4 FINANCIAL SERVICES ONLY:

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

6.0. CONSTRAINTS:

- No activity should be initiated beyond the initial assessment without the authorization from the Service Canada VRCM;
- The IWRP cannot be implemented without the authorization of the Service Canada VRCM and concurrence from the participant and treating physician or nurse practitioner;
- The Service Canada VRCM is responsible for all decisions regarding the participant's vocational rehabilitation program and will decide whether the program should continue after the review of each report;
- The Service Canada VRCM will determine the frequency of monitoring in consultation with the service provider, the phase of the rehabilitation plan and the need of the participant, unless otherwise specified in the contract;
- All correspondence and documents (electronic or otherwise) generated on the case are the property of the Crown and subject to the Privacy Act;
- All requests for copies of information from participant are subject to the Privacy Act and must be forwarded to the Service Canada VRCM who will then respond to the participant; and
- No "Skyping", "Face Time" or other video chat applications are allowed.

6.1 USE, RETENTION, DISPOSAL AND SECURITY OF INFORMATION:

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

- For the purposes of allowing the service provider to perform the work under the contract, Service Canada shall make available to the service provider, in accordance with the section 69 and 70 of the *CPP* Regulations and other applicable laws governing the protection of information under its control, information required to assist the participant in their return to work, which is stored in ESDC's Personal Information Bank (PPU 146).
- For the purpose of performing the work under the contract, the service provider shall collect, on behalf of Service Canada, any required information as discussed with the Service Canada VRCM.
- The service provider shall:
 - inform the individual (i.e. vocational rehabilitation participant) of the purpose of the collection, including any statutory authority for the collection, of their right to refuse to provide any or all of the requested information and any possible consequence of such refusal, and of their right of access and correction.
 - make every effort to ensure the accuracy of the information collected.
 - not collect, use or disclose the information respectively referred to in sections 1 and 2 except for the purpose of performing the work under the contract.
 - maintain all information referred to in bullets 1 and 2 above, and make sure it is only accessible, in Canada.
 - segregate all records containing information referred to in bullets 1 and 2 above (whether in electronic formation or in hard copy) from its other records, and keep all databases in which such records are to be maintained physically independent from all other database, directly or indirectly, which is located outside Canada.
 - ensure that all aspects of the processing of information referred to in bullets 1 and 2 above are conducted and only accessible in Canada.
 - ensure that every person of whom it retains to fulfil its obligations under this contract, knows and complies with all the terms and conditions of this contract with respect to the protection of information referred to in bullets 1 and 2 above.
- Unless otherwise required by law or authorized in writing by the individuals to whom that information relates, the service provider will ensure that no information referred to in bullets 1 and 2 above, is disclosed to a third party for a purpose authorised herein, unless there is a written agreement between the service provider and the third party, imposing upon the third party obligations that are the same as those that are imposed upon the service provider under this contract with respect to the protection of this information.

- The information referred to in bullets 1 and 2 above remains at all times under the control of Service Canada.
- The information referred to in bullets 1 and 2 above is protected by the *Privacy Act* (<http://laws-lois.justice.gc.ca/eng/acts/p-21/>) and any other applicable federal laws governing the protection of personal information held by federal institutions.
- The Service Provider personnel (employees, contractors, sub-contractors) requiring access to PROTECTED information, assets or work site(s) must each hold a valid reliability status, granted or approved by the CISC, PWGSC, and are given access to VR participants' information on a need to know basis.
- Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, upon expiry or termination of the contract, whichever is earlier, the service provider shall (return to Service Canada) the information (paper or electronic) referred to in bullets 1 and 2 above copies thereof, if any. All paper files are to be sent back to the department following Protected B security (via mail: double enveloped, gum-sealed, with no security marking on the outer envelope). If electronic files exist, they are to be sent back to the department following Protected B security (as indicated above) by encrypted email or CD. When returning records, information must be segregated by participant. This will be arranged in consultation with the Service Canada VRCM.

6.2 VALIDATION FOR PHYSICAL SECURITY:

- The Service Provider must comply with the provisions of the Public Works and Government Services Canada Common Professional Services Security Requirements Check List (SRCL) #9 and Industrial Security Manual (Latest Edition).
- The Service Provider must, at all times during the performance of the Contract/Standing Offer, hold a valid Designated Organization Screening (DOS) with approved Document Safeguarding and Production Capabilities at the level of PROTECTED B, issued by the Canadian Industrial Security Directorate (CISC), Public Works and Government Services Canada (PWGSC). Subcontracts which contain security requirements are not to be awarded without the prior written permission of CISC/PWGSC
- In following the 'principle of least-privilege', ESDC must only provide the service provider and its staff (contractors and sub-contractors) the minimum access required for individuals to perform their duties.

6.3 NETWORK SERVICES:

The Service Provider must not utilize its Information Technology systems to electronically process, produce or store protected information until the CISC/PWGSC has issued written approval. After approval has been granted or approved, these tasks may be performed up to the level of Protected B. The Service Provider must use a standalone desktop or notebook computer that is not connected to the Internet while processing sensitive documents.

7.0 OUTCOMES / DELIVERABLES:

All reports must include required outcomes and deliverables as described below. Service providers may seek an extension from the VRCM in advance of the expiry of the timeframes indicated below.

7.0.1 Assessment Phase:

Initial Assessment Reports: Must be submitted within 30 calendar days of referral. If 30 calendar days is not attainable the service provider may ask for an extension up to a maximum of 60 calendar days, before the 30-day maximum is reached. All correspondence and documentation obtained and/or generated for the assessment must be attached to the report (See Appendix "B").

7.0.2 Vocational Confirmation/Exploration Activity Reports: must include an analysis of the participant's vocational potential, results of specialized assessments, recommended occupational options and a decision as to whether or not to proceed at this time. All original correspondence and documentation obtained and/or generated during this activity-must be submitted within 30 calendar days.

7.0.3 Labour Market Analysis Report: Submitted as part of the Vocational Confirmation/Exploration and prior to initiating the IWRP. If requested by the Service Canada VRCM, a copy of the participant's labour market research must be submitted with the Labour Market Analysis Report (LMA). Note: In certain circumstances dependent on the participant situation, the Service Canada VRCM may indicate that the LMA Report is not necessary. (See Appendix "C")

7.0.4 Specialized Assessment Reports: will only be supported by the Service Canada VRCM when more specific information is needed to further determine a participant's rehabilitation potential and/or suitability to continue in the CPPD VR program. All original correspondence, documentation and interpretation, must be submitted 14 calendar days after completion of the assessment.

7.0.5 Planning Phase:

Individual Written Rehabilitation Plan (IWRP): A draft IWRP must be submitted within 14 calendar days of completion of the vocational exploration/confirmation phase and must be approved by the Service Canada VRCM prior to obtaining stake-holder signatures. The IWRP must be signed by all stake-holders prior to the implementation of any intervention (See Appendix "D").

7.0.6 Cost Sharing Agreement: An agreement between Service Canada and other vested stakeholders regarding the disbursements associated with the IWRP. Where applicable, the cost-sharing agreement must be submitted with the IWRP. The agreement is to be signed by the SC VRCM and the stakeholder(s) to ensure the parties paying for the disbursements clearly understand their financial obligation.

7.0.7 Amended Individual Written Rehabilitation Plan (AIWRP): must be submitted as directed by the Service Canada VRCM when there is a significant change in the participant's

health status or a significant change to the original IWRP. The amended return to work plan must be submitted within 14 days of VRCM approval to amend the IWRP.

7.0.8 Intervention Phase:

Progress Report: must be submitted a minimum of every 90 calendar days or at a greater frequency as negotiated with the Service Canada VRCM, normally only when activity justifies an update, and should follow the content outlined herein. All correspondence and documentation generated and/or obtained during the reporting period must be attached to the report. In addition to reporting all relevant activities within the period covered, the report should provide a summary of contacts including the dates, participant observations, emerging barriers, evidence of capacity or incapacity for work, specific recommendations (and justifications for significant changes), assessment on successful outcome(s), future outcomes and requested actions to the Service Canada VRCM (See Appendix "E").

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

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

7.0.9 (a) Job Search Agreement: must be submitted to Service Canada prior to starting an approved job search period. The agreement must be signed by the participant and the service provider to confirm participant readiness to commence the job search. In consultation with the Service Canada VRCM, the agreement will identify:

1. the duration of the job search period (if after three months it is determined that the job search period should be extended, prior approval from the VRCM is required);
2. the number of required weekly employer contacts as confirmed by the Service Canada VRCM; and
3. the number of hours required for one-on-one job search assistance to be provided directly by the service provider.

Any extensions to the job search period and or changes to the volumes defined above require approval from the VRCM. Additionally, evidence of the weekly employer contacts (See Appendix "F": Employer Contact Sheet Template) may be requested on a regular basis.

If the participant is successful in their job search, the service provider is to notify the Service Canada VRCM with the employment details (job title, start date, salary, hours of work, etc.) and any accommodations in place to support the Return to Work (See Appendix "G": Job Search Agreement).

7.0.9 (b) Return to Work Follow-up Report: a minimum of one report must be submitted at the end of the sixth week of each three-month work trial period (additional reports may be

required by the Service Canada VRCM). The report must include details of the job (title/type/earnings and amount of hours worked on a weekly basis), an evaluation of performance by the supervisor (if appropriate) and participant, identification of problems/issues, recommendations for workplace accommodations or specialized equipment, record of attendance at work (can be provided by the participant if not self-disclosed to the service provider), **copies of the pay stubs** and recommendations (See Appendix "H": Return to Work Follow-up Report).

7.0.9 (c) Closure Report: must be submitted within 14 calendar days from the termination of vocational rehabilitation services. Content must include an overview of complete IWRP activities and outcomes, evidence of participant capacity or incapacity to return to a substantially gainful occupation (SGO), and total invoiced costs. If the participant is not successful with the IWRP, recommendations for next steps as discussed in collaboration with the VRCM are to be included. **All outstanding invoicing must be submitted with the final report** (See Appendix "I": Closure Report).

7.1 INVOICING METHOD:

All itemized invoices are carefully reviewed to ensure the integrity of the CPP fund. Invoices must be submitted a minimum of every 30 calendar days using the General Invoicing template (see Appendix "J").

Invoices with accompanying receipts along with each disbursement and progress report unless otherwise negotiated with the Service Canada VRCM.

Service providers must send in original invoices or certified copies of invoices as per the Treasury Board guidelines of Directive on Delegation of Financial Authorities for Disbursements: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=17060§ion=text>. Payments will not be processed using "uncertified" copies.

A certified copy is one that is: stamped by the service provider indicating that: "this is a true copy of the original", signed, and dated by the service provider. If the service provider is submitting "certified copies", the original must be retained for a minimum of one (1) year beyond the end of the contract.

No services are to be initiated prior to receiving the individual call up from Service Canada's procurement department. Service Canada will **not** pay for services which have not been pre-approved by the Service Canada VRCM and/or are not within the scope of the IWRP.

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

8.0 RATES:

Service Providers will be paid their firm hourly professional rate up to the maximum hours stipulated within each rehabilitation phase as per the basis of payment. **No services are to be initiated prior to** receiving the individual call up from Service Canada's procurement department. No services are to go

beyond the initial assessment prior to having confirmation from the SC VRCM. Of note: the participant's call up **may** indicate additional hours to cover unexpected requirements, **however, the service provider is to contact the SC VRCM prior to accessing any of the additional hours.**

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

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

8.1 PARTICIPANT DISBURSEMENT AND TRAVEL EXPENSES:

Disbursements will be reimbursed at cost with no mark-up. Invoices must be itemized and must be submitted a minimum of every 30 calendar days. Disbursements and any charges must be approved in advance by the Service Canada VRCM and deemed eligible in the statement of work. **All** disbursements submitted for reimbursement require receipts.

Disbursements may include but are not limited to the following:

- ◆ Training/Tuition on a semester basis;
- ◆ Transportation for the participant (parking, bus passes, program assessments, appointments, travel to work settings and/or educational institutions, etc.);
- ◆ Books/software for training;
- ◆ Laptops/computers;
- ◆ Physician or Nurse Practitioner reports;
- ◆ Specialized assessments;
- ◆ Licensing, certification costs;
- ◆ Checks required by a participant employer (criminal record checks etc.)
- ◆ Cost of examination;
- ◆ Cost of assistive devices;
- ◆ Work hardening programs, job coaching;
- ◆ Postage, faxing and long distance calls as per the RWP; and
- ◆ Other items, as per the discretion of the VRCM.

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

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

8.2 SERVICE PROVIDER DISBURSEMENT AND TRAVEL EXPENSES:

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

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

Service Provider travel costs will be reimbursed only where pre-authorized by Service Canada.

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

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

9.0. PERFORMANCE OUTCOMES:

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

ANNEX B - EVALUATION

TECHNICAL BID EVALUATION- Suppliers need to submit a separate technical proposal for each area along with a separate financial proposal.

1. MANDATORY EVALUATION CRITERIA:

- The bidder is required to provide services in both official languages for (Area 3) New Brunswick and (Area 7) Sudbury, ON.

MET: ____ YES MET: ____ NO OR NOT APPLICABLE

____ Not bidding on Area 3 or ____ Not bidding on Area 7

- Vocational Rehabilitation Consultants

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

- University degree or a diploma in Social Sciences, Health Sciences, Human Services AND;
MET: ____ YES MET: ____ NO
- Two of the last three years experience* in the provision of Vocational Rehabilitation services is the minimum requirement .
MET: ____ YES MET: ____ NO

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

Proposed staff who do not meet the minimum mandatory requirement will not be considered eligible for the work and will not be evaluated as part of a bidder's proposal. If there is no staff proposed by a bidder that meets the minimum mandatory requirement described above, the bid shall be considered a failed bid.

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

2. POINT RATED EVALUATION CRITERIA:

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

Criteria	Maximum Points
1) Education/training/certification: VR Consultant	35 points
2) Related Experience of Proposed: VR Consultant(s)	45 points
3) Demonstrated ability to provide immediate and in person services And number of curriculum vitae submitted	20 points
4) Demonstrated Network for Specialized Assessments	5 points
5) Accessibility	5 points

6) Case Study (see Appendix A)

40 points

Total

150 points

In order to be considered for contract award technical proposal must score a minimum of 70% of the maximum points available (ie minimum points required = 105). Proposals which fail to score the minimum 70% will be declared non-responsive and not considered further. Two of the last three years of experience in the provision of Vocational Rehabilitation services is a minimum requirement for evaluation. Bidders are instructed to provide a maximum of top five (5) proposed staff for each specific area. If additional CV's are provided by the bidder for a specific area, the first 5 will be evaluated and all others discarded. Bidders should not that providing less than 5 staff in areas of high demand may result in an overall reduced ranking.

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

TECHNICAL PROPOSAL:

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

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

3) To address Evaluation Criteria #3: Demonstrated ability to provide immediate and in-person service to clients. The bidder must include the address of each office location that they intend to use to provide services to clients within a specified area. This criterion is assessed on proximity and potential costs that may be incurred for travel. It is understood that difficult commutes requiring overnight stays may be required in remote areas, but generally office locations within an area or within close proximity receive higher points. It is up to the bidder as to what additional information to include, and the particular format to be used. The information should however be detailed enough so as to allow a complete evaluation. Bidders should also note that all office locations are subject to Physical Security Validation as stated in Annex A section 6.2.

4) To address Evaluation Criteria # 4: For Demonstrated Network for Specialized assessments (6.3), provide details on the network of services you have, either within your organization or available through subcontracting, to supply the specialized assessment services e.g.:detail who will perform the Neuro-psychological assessments and detail their experience and expertise etc. Provide the qualifications of the assessment providers. For your ease, please complete Appendix L with your bid.

5) To address Evaluation Criteria #5: For accessibility requirements (4.2), provide details regarding how you will ensure services are accessible when providing services for persons with disabilities for in-person sessions and the accessible technology and formats that will be used for ongoing communication with the participant and Service Canada when producing deliverables.

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

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

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

2. FINANCIAL BID EVALUATION

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

ANNEX "C"

BASIS OF PAYMENT / FINANCIAL EVALUATION

MANDATORY REQUIREMENTS FOR THE FINANCIAL BID:

- The Offeror must **complete the attached pricing schedule and include it in its financial offer** once completed.
- The Offeror **must** include **SEPARATE SCHEDULES FOR EACH AREA** where they propose to offer Vocational Rehabilitation services.
- The Offeror **must** submit rates for **ALL** categories of service and **ALL** periods.
- The rates specified in the pricing schedule, when quoted by the Offeror, exclude travel and living expenses.

INITIAL PERIOD: April 1, 2020 to March 31, 2021,
OPTION PERIOD I: April 1, 2021 to March 31, 2022
OPTION PERIOD II: April 1, 2022 to March 31, 2023

FOR THE PURPOSE OF EVALUATION, ALL RATES ARE EXCLUSIVE OF GST/HST AS APPLICABLE
Geographic Service Area being bid on: _____
Please refer to the list of Areas attached and specify the Area for which you are bidding.
Work Location from which services in Geographic AREA will be offered:

CATEGORY OF SERVICE Identified in Statement of Work	FIRM HOURLY RATE			
	Initial Period (A)	Option Period I (B)	Option Period II (C)	AGGREGATE TOTAL (A+B+C)=D
7.0.1 Initial Assessment				
7.0.2 Vocational Confirmation				
7.0.5 Individual Return to Work Plan (IRWP)				
7.0.7 Revised IRWP				
7.0.8 Client Development and Skills Training Report				
7.0.9.(a) Job Search Activity-preparation				
- assistance				
-placement				
Follow up on the job evaluation activity				
7.0.9 (b) Reports				
- progress				
- return to work				
7.0.9 (c) closure				
7.1 Financial Services (hourly rate)				

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CATEGORY OF SERVICE Identified in Statement of Work	FIRM HOURLY RATE			
	Initial Period (A)	Option Period I (B)	Option Period II (C)	AGGREGATE TOTAL (A+B+C)=D
8.1 Travel Time Only (hourly rate)				
AGGREGATE TOTAL (D):				

FOR THE PURPOSE OF FINANCIAL EVALUATION: THE AGGREGATE TOTAL (D) WILL BE UTILIZED AS THE DOLLAR VALUE TO DETERMINE OFFEROR RANKINGS.

Specialized assessments:

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

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

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

Type: _____ Rate: _____
Type: _____ Rate: _____
Type: _____ Rate: _____

Financial Services and Travel Time:

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

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ANNEX "D"

SECURITY REQUIREMENTS CHECK LIST

SEE ATTACHED

ANNEX "E"

Insurance Requirements

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 below.

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.

1.1 Commercial General Liability Insurance

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.

The Commercial General Liability policy must include the following:

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

k. If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.

l. Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.

m. Non-Owned Automobile Liability - Coverage for suits against the Contractor resulting from the use of hired or non-owned vehicles.

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

For 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.

ANNEX "F"
REGIONAL INDIVIDUAL STANDING OFFER BUSINESS VOLUME REPORT

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

If some data is not available, the reason must be indicated. If no goods or services are provided during a given period, the Offeror must still provide a "nil" report.

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

The quarterly reporting periods are defined as follows:

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

The data must be submitted to the Standing Offer Authority no later than ten (10) calendar days after the end of the reporting period. ***Failure to provide fully completed reports in accordance with the above instructions may result in the setting aside of the Standing Offer and the application of a vendor performance corrective measure.***

Supplier's Name					
Standing Offer Title and Description					
Standing Offer Number					
Reporting Period (Fiscal Year and Quarter)					
Total \$ Value of Order for the Reporting Period (including HST)					
Total \$ Value of Order for the Fiscal Year to Date (including HST)					
Date	Call-up / Contract Number	ITEM DESCRIPTION	QTY	UNIT	TOTAL

The required information for this Standing Offer must be e-mailed to the following addresses:
marie.hollylafortune@hrsdcc-rhdcc.gc.ca with a cc to rhonda.lacey@pwgsc-tpsgc.gc.ca

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ANNEX "G"

ELECTRONIC PAYMENT INSTRUMENTS

As indicated in Part 3, clause 3.1.2, the Offeror must complete the information requested below, to identify which electronic payment instruments are accepted for the payment of invoices.

The Offeror 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 "H"

INTEGRITY PROVISIONS - REQUIRED DOCUMENTATION

List of Names

(a) Offerors who are incorporated, including joint ventures, must provide a complete list of names of all individuals who are currently directors. Offerors bidding as sole proprietorship, as well as those bidding as a joint venture, must provide the name of the owner(s). Offerors bidding as societies, firms, or partnerships do not need to provide lists of names.

(b) If the required list of names has not been received by the time the evaluation of offers is completed, Canada will inform the Offeror of a time frame within which to provide the information. Failure to provide the names within the time frame specified will render the offer non-responsive. Providing the required names is a mandatory requirement for award.

(c) The Offeror must immediately inform Canada in writing of any changes affecting the list of names during this procurement process.

Complete Legal Name of Company _____

PBN _____

List of names of the current Board of Directors or Owners:

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APPENDICES

A-L Attached

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APPENDICES

A-L Attached



CANADA PENSION PLAN DISABILITY VOCATIONAL REHABILITATION PROGRAM HYPOTHETICAL CASE STUDY

Referral Source: 1-800 call: Self-referral

Age: 48

Sex: Female

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

Education: Completed grade 12, 3 courses completed towards Business Administration Certificate

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

Occupational History: Most recently employed from February 2014 to September 2017 as a full-time Pharmaceutical call center representative. Previous work history includes employment as Administrative Assistant from October 2010 to January 2014. Counter sales at Tim Horton's and waitressing jobs on and off over several years.

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

Financial History: Beneficiary has been in receipt of CPP-Disability benefits since March 2018. Beneficiary is receiving \$1,335.83 per month in CPP-D benefits, plus Disabled Contributor Child Benefits of \$244.64.

Medical History/Information: Medical information dated July 2017 from Family Physician indicates: has experienced daily pain related symptoms dating back to early 2010. Diagnosed with Fibromyalgia in 2010/hospitalized from November 3 to November 27, 2014. Hospitalization July 2017, relating to Major Depressive disorder, eventually diagnosed with bi-polar disorder, with anxiety.

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



Canada Pension Plan Disability Vocational Rehabilitation Program Initial Assessment Report

Client Name:	Name of Service Provider:
Client Identifier Number:	Name of Consultant:
Client Address:	Consultant Telephone Number:
Client Telephone Number:	Date of Referral (YYYY-MM-DD):
Service Canada VR Case Manager:	Date of Report (YYYY-MM-DD):

Date of Interview with the Client (YYYY-MM-DD):
Date of Interview with the Physician/Nurse Practitioner (if applicable) (YYYY-MM-DD):
Date of Interview with Employer (if applicable) (YYYY-MM-DD):

Diagnosis(es):
Specific Reason(s) for Referral:

PSYCHOSOCIAL PROFILE**Subjective:**

Please ensure your report addresses the areas identified below:

- General impression of the client;
- General attitude of the client;
- Motivation: What are the incentives, disincentives to return to work (RTW);
- Cognitive Status;
- Emotional Status.

Objective:

Please ensure your report addresses the areas identified below:

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

Description of Client's Home Environment:

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

Medical and Rehabilitation Interventions:

Please ensure your report addresses the areas identified below:

- Primary and secondary diagnosis(es);
- Recent medical interventions including client's compliance and response;
- Past and current rehabilitation including client's compliance and response;
- Change in medical status since benefits granted;
- Prognosis: Indicate if there is a potential for "medical instability";
- Signed letter by client's physician, or summary of consultant's meeting and/or telephone conversation with client's physician;
- Special consideration, restriction to Return to Work;
- List of current medications;
- Need/use of assistive devices.

Education Profile:

Please ensure your report addresses the areas identified below:

- Formal and Informal education;
- Certificate(s), dates of completion.

Vocational Profile:

Please ensure your report addresses the areas identified below:

- Previous Testing (aptitude, interest, vocational, etc.) results and/or interpretation (if available);
- Previous Vocational Rehabilitation activities and programs;
- All previous work experience(s) (occupations, duration, salary, job description);
- Transferable skills;
- Client vocational goals, expectations of a return to work program;
- Employability profile: academic skills, personal management skills, teamwork skills;
- Interests, hobbies and volunteer work.

Financial Profile:

Please ensure your report addresses the areas identified below:

- Client expenses;
- Coverage under other Third Party Provider Programs (Student Loan, EI Program, WCB, Long-Term Disability Insurer, Auto Insurer, Social Assistance, etc.).

Employer Interview (if applicable):

Please ensure your report addresses the areas identified below:

- Brief description of the activities performed in the client's own job and whether it is still available;
- Accommodations the employer is willing to make, if necessary;
- Availability of alternate work;
- Client's work attitude and attendance;
- Employer's willingness to accommodate the client, provide alternative work, proposed schedule and salary (if applicable).

Third Party Provider Interview (if applicable):

Please ensure your report addresses the areas identified below:

- Overview of planning and/or assessment(s) completed to date;
- Cost sharing opportunity;
- Type of resource(s) available;
- Information sharing.

Client Identifier Number:

PROTECTED B (when completed)

Functional Status:

Please ensure your report addresses the areas identified below:

- Provide a description of the client's past and current functional level based on the client, physician and employer (if applicable) interviews (report of employer interview to be attached) clarifying the type of impairment affecting the client and how it affects current activities: self-care work and leisure, transportation, family life, etc.;
- List positive and negative barriers to employment and identify those that can be decreased/minimized;
- Identify whether or not the client's goals are realistic;
- Explore potential for job development.

Recommendations:

Prior to making any recommendations for further service or intervention, please choose the applicable client rehabilitation potential statement.

Client's Rehabilitation Potential:

Rationale:

- Explanation for your recommendation.

Next Steps:

Choose an item:

Comments:



Canada Pension Plan Disability Vocational Rehabilitation Program LABOUR MARKET ANALYSIS

Client Name:	Service Provider:
Client Identifier Number:	Consultant:
Client Address:	Consultant Telephone Number:
Client Telephone Number:	Date of Report: (YYYY-MM-DD)
Service Canada VR Case Manager:	

A Labour Market Survey for

was completed between _____ and _____.

Job Description
Job title:
National Occupational Classification (NOC):
Education/Training:
Credentials:
Skills and Abilities:
Duties:
Wages:
Outlook/Employment Potential:
Work Conditions and Physical Capabilities:
Additional Comments:

Client Identifier Number:

PROTECTED B (when completed)

Potential Position - it is expected that at least two companies will be contacted by the Service Provider **AND** two companies by the Client unless otherwise directed by the Service Canada VRCM.

POTENTIAL POSITION - 1 Choose an item

Position:	
Company:	
Contact:	
Location:	
Qualifications and Responsibilities:	
Physical Requirements:	
Tools and Equipment Utilized:	
Travel Requirements: Choose an item	Security Clearance Required: Choose an item
Salary Range:	
Company Benefits:	
Hours:	
Available Training through Employer: Choose an item	
Additional Comments:	

Client Identifier Number:

PROTECTED B (when completed)

POTENTIAL POSITION - 2 Choose an item

Position:	
Company:	
Contact:	
Location:	
Qualifications and Responsibilities:	
Physical Requirements:	
Tools and Equipment Utilized:	
Travel Requirements: Choose an item	Security Clearance Required: Choose an item
Salary Range:	
Company Benefits:	
Hours:	
Available Training through Employer: Choose an item	
Additional Comments:	

Client Identifier Number:

PROTECTED B (when completed)

POTENTIAL POSITION - 3 Choose an item

Position:	
Company:	
Contact:	
Location:	
Qualifications and Responsibilities:	
Physical Requirements:	
Tools and Equipment Utilized:	
Travel Requirements: Choose an item	Security Clearance Required: Choose an item
Salary Range:	
Company Benefits:	
Hours:	
Available Training through Employer: Choose an item	
Additional Comments:	

Client Identifier Number:

PROTECTED B (when completed)

POTENTIAL POSITION - 4 Choose an item

Position:	
Company:	
Contact:	
Location:	
Qualifications and Responsibilities:	
Physical Requirements:	
Tools and Equipment Utilized:	
Travel Requirements: Choose an item	Security Clearance Required: Choose an item
Salary Range:	
Company Benefits:	
Hours:	
Available Training through Employer: Choose an item	
Additional Comments:	

Summary:
Choose an item
Rationale:
Enclosures:
Choose an item



**Canada Pension Plan Disability Vocational Rehabilitation Program
INDIVIDUAL WRITTEN REHABILITATION PLAN (IWRP)**

Client Name:	Service Provider:
Client Identifier Number:	Consultant:
Client Address:	Consultant Telephone Number:
Client Telephone Number:	Date (YYYY-MM-DD)
Service Canada VR Case Manager:	Original/Revised: (Choose an Item)

Client Profile

Current Education/Training:
Current Skills and Abilities:
Previous Occupation(s):
Current Certification(s):
Education Goal(s):
Future Job Expectation(s):

Employment Goals

Choose an Item:	Choose an Item:
List Vocational Rehabilitation short & long term goals:	

Service Canada delivers Employment and Social Development Canada
programs and services for the Government of Canada

Client Identifier Number:

PROTECTED B (when completed)

Projected Costs

Intervention Phase (provide a brief description)

	Service / Goods / Strategies required	Provider (funding source)	Start Date	End Date	Cost
Fiscal Year 1					
Fiscal Year 2					
Fiscal Year 3					

Financial Services (provide a brief description)

	Service / Goods / Strategies required	Provider (funding source)	Start Date	End Date	Cost
Fiscal Year 1					
Fiscal Year 2					
Fiscal Year 3					

Client Disbursement and Travel Expenses (provide a brief description)

	Service / Goods / Strategies required	Provider (funding source)	Start Date	End Date	Cost
Fiscal Year 1					
Fiscal Year 2					
Fiscal Year 3					

Service Provider Disbursement and Travel Expenses (provide a brief description)

	Service / Goods / Strategies required	Provider (funding source)	Start Date	End Date	Cost
Fiscal Year 1					
Fiscal Year 2					
Fiscal Year 3					

Total costs

Fiscal Year 1:	\$0.00
Fiscal Year 2:	\$0.00
Fiscal Year 3:	\$0.00
Total:	\$0.00

Breakdown of Costs

Service Canada:		Client (if applicable):	
Third Party Partner:		Other:	

Client Identifier Number:

PROTECTED B (when completed)

The information you provide is collected under the authority of the *Canada Pension Plan (CPP) Act* and the *Canada Pension Plan Regulations (CPPR)* for the purpose of administration of the Canada Pension Plan Disability Vocational Rehabilitation program.

Participation in the CPP Disability Vocational Rehabilitation program is voluntary. Refusal to provide personal information will result in you not being considered for the Vocational Rehabilitation program.

The information you provide may be used and/or disclosed for policy analysis, research and/or evaluation purposes. However, these additional uses and/or disclosures of your personal information will never result in an administrative decision being made about you.

Your personal information is administered in accordance with the *Department of Employment and Social Development Act* the *Privacy Act* and other applicable laws. You have the right to the protection of, access to, and correction of your personal information, which is described in Personal Information Bank ESDC PPU 146, Canada Pension Plan Program. Instructions for obtaining this information are outlined in the government publication entitled **Info Source**, at: www.canada.ca/infosource-ESDC. *Info Source* may also be accessed on-line at any Service Canada Centre.

You have the right to file a complaint with the **Privacy Commissioner of Canada** regarding the institution's handling of your personal information at: www.priv.gc.ca/en/report-a-concern/.

Client Signature

☐ I accept this plan and agree to the following:

- Service Canada agrees to pay for the costs outlined in this plan;
- It is my job to look for work as part of my plan;
- I will inform the service provider of any changes which could affect my plan; and
- Approval is needed if my plan changes.

☐ I do not accept this plan. Please see my comments.

Client Signature:

X

Date (YYYY-MM-DD)

Additional Comments:

Client Identifier Number:

PROTECTED B (when completed)

Physician/Nurse Practitioner signature

☐ I agree with the rehabilitation plan as outlined. I have no medical concerns with the client's active participation in this rehabilitation plan.

☐ I do not agree with the rehabilitation plan as outlined. Please see my comments.

Physician/Nurse Practitioner signature:

X

Date (YYYY-MM-DD)

Additional Comments:

Consultant signature:

X

Date (YYYY-MM-DD)

Service Canada VR Case Manager signature:

X

Date (YYYY-MM-DD)

Additional Comments:



Canada Pension Plan Disability Vocational Rehabilitation Program Progress Report

Client name:	Service provider:
Client identifier number:	Consultant:
Client address:	Consultant telephone number:
	Date of last report: (YYYY-MM-DD)
Client telephone number:	Current phase:
Service Canada VR Case Manager:	Date of current report: (YYYY-MM-DD)

**Note: Do not repeat or "copy and paste" information contained
in previous reports or in the referral information.**

1. Summary of activities				
Start Date (YYYY-MM-DD)	End Date (YYYY-MM-DD)	Length of time	Type	Contact
1.				
Summary of activity				
2.				
Summary of activity				
3.				
Summary of activity				
4.				
Summary of activity				
5.				
Summary of activity				
6.				
Summary of activity				
7.				
Summary of activity				
8.				
Summary of activity				

Service Canada delivers Employment and Social Development Canada
programs and services for the Government of Canada

Start Date (YYYY-MM-DD)	End Date (YYYY-MM-DD)	Length of time	Type	Contact
9.				
Summary of activity				
10.				
Summary of activity				

2. Current status of plan

(Degree of client's follow through and cooperation comment on the interest, motivation and specific efforts initiated by the client, barriers emerging which may delay the rehabilitation process and actions taken/recommendations, evidence of capacity, incapacity to return to work, next significant milestones, assessment on successful outcome)

3. Job development/placement activities (if applicable)

(List specific employers contacted, job and salary information; and employer response/outcome)

4. Community resources

(List any specific community resources accessed during this reporting period including the names of specific contacts and organizations and the purpose for the use)

5. Projected costs

Outline:
 (Original cost of IWRP, remaining costs to complete the case, any potential costs not currently committed)
 (Justification for change in vocational rehabilitation cost, or request for more funds)

6. Requested actions

(Service Canada Vocational Rehabilitation Case Manager action requested)

7. Additional comments

(Anything not commented in the previous sections)



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

Client Name _____ Identification Number: _____

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



Canada Pension Plan Disability Vocational Rehabilitation Program Job Search Agreement

Service Provider: Select a Service Provider	
Client Name:	Type:
Client Identification Number:	Version:
Client Address:	Consultant Name:
	Consultant Telephone Number:
Client Telephone Number:	Date:
Service Canada Vocational Rehabilitation Case Manager:	

As part of your participation in Canada Pension Plan's (CPP) Disability Vocational Rehabilitation Program, CPP has agreed to sponsor you in a **month job search** facilitated by _____ from _____ to _____.

You will be provided an Employer Contact Sheet by _____ in order to document job search efforts on a bi-weekly basis. You are expected to contact a **minimum of employers per week** and to submit these to _____ every two weeks.

- You agree to focus job search efforts in the following occupation(s):

will provide ongoing regular weekly communication with you to assist with the Job Search process. This assistance may include:

- the provision of additional copies of résumés and cover letters,
- the identification of potential employers and job opportunities (and/or sources where these can be obtained) and/or
- on-going job search support.

With the support of _____ and Canada Pension Plan Vocational Rehabilitation Program, you agree to:

- comply with the conditions outlined above;
- take responsibility for carrying out your job search;
- inform _____ of all employment;
- inform _____ of all employment-related earnings obtained during the job search and work trial period and
- provide copies of paystubs if requested.

If you are successful in your efforts to secure substantially gainful employment within the job search period, your CPP Disability benefits will be extended during a work trial for a minimum of three months.

X _____
Client Signature **Date** (YYYY-MM-DD)

X _____
Select Service Provider **Date** (YYYY-MM-DD)

Canada Pension Plan Disability Vocational Rehabilitation Program RETURN TO WORK FOLLOW UP REPORT

Client Name:	Service Provider:
Client Identifier:	Consultant:
Client Address:	Consultant Telephone:
Client Telephone:	Date of Report: (YYYY-MM-DD)
Service Canada VR Case Manager:	

Employment Details:	
Employer Name:	Start Date: (YYYY-MM-DD)
Employer Address:	Type of Work:
Employer Telephone:	Nature of Employment: Choose an item
Hours of Work: Insert number of hours Choose an item	Reason for Part-Time Employment (if applicable): Client Choice
Rate of Pay: Insert \$ amount Choose an item	Date Stopped Work (if applicable): (YYYY-MM-DD)
Total Monthly Earnings:	Reason Stopped Work (if applicable):

Comments:	
Has there been any time lost due to illness? (If yes, provide details below)	<input type="radio"/> Yes <input type="radio"/> No
Is the beneficiary tolerating the demands of the job? (If no, provide details below)	<input type="radio"/> Yes <input type="radio"/> No
Details:	
<i>(Describe any special arrangements made by the employer to accommodate the beneficiary, barriers identified, service provider supports/services, client's capacity to return-to-work, an evaluation of performance by the supervisor and/or client and any further recommendations that will support the client with his/her return-to-work to ensure success.)</i>	
Has allowable earnings been reached? (If No, explain)	<input type="radio"/> Yes <input type="radio"/> No

Enclosures (if applicable):	Choose an item
------------------------------------	----------------



Canada Pension Plan Disability Vocational Rehabilitation Program CLOSURE REPORT

Client Name:	Service Provider:
Client Identifier:	Consultant:
Client Address:	Consultant Telephone:
Client Telephone:	Phase at time of Closure Report: Choose an item
Service Canada VR Case Manager:	Date of Report: (YYYY-MM-DD)

Synopsis of all interventions over course of the Vocational Rehabilitation Plan:

--

Total Invoiced Cost:

--

Reasons for Closure:

Choose an item

Comments: (Mandatory)

Provide a detailed rationale to support the reason for closure.

--



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Canada

Canada Pension Plan Disability Vocational Rehabilitation Program
APPENDIX “J” – REQUESTED CONTENT
General Invoice Template

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

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

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

Client Information

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

Service Information

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

Disbursement Information (at cost, no mark-up)

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

B:

Invoice Total A + B	
---------------------------	--



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**Canada Pension Plan Disability Vocational Rehabilitation Program
APPENDIX "K" – REQUESTED CONTENT
TRAVEL EXPENSE CLAIM**

To Be Completed by the Traveller (Service Provider)

Organization:

Invoice #:

Name:

Telephone:

Address:

City:

Postal Code:

START DATE OF TRAVEL: _____ END DATE OF TRAVEL: _____

DESTINATION: _____

TIME OF DEPARTURE: _____ TIME OF RETURN: _____

TOTAL DAYS TRAVELED FOR THIS INVOICE: _____

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

Traveller's Signature: _____ Date: _____

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

Appendix L: Demonstrated Network for Specialized Assessments

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

AREA: _____

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



Government of Canada
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Contract Number / Numéro du contrat

G9282-214643

Security Classification / Classification de sécurité
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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 ESDC Service Canada	2. Branch or Directorate / Direction générale ou Direction Transportation and Integrated Service Management -B09g	
3. a) Subcontract Number / Numéro du contrat de sous-traitance G9282-19048800409157-190488	b) Name and Address of Subcontractor / Nom et adresse du sous-traitant CWE Carter and Vocational Examinations Inc. 1500 Markham	
4. Brief Description of Work / Brève description du travail Initiation of a Request For Proposal process to establish contracts for the provision of Vocational Rehabilitation Services to CPPD Beneficiaries residing in the CN region.		
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 <input type="checkbox"/> Yes Non Oui		
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 <input type="checkbox"/> Yes Non Oui		
6. Indicate the type of access required / Indiquer le type d'accès requis		
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? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes Non Oui (Specify the level of access using the chart in Question 7, c) (Préciser le niveau d'accès en utilisant le tableau de la question 7, c)		
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 <input type="checkbox"/> Yes Non Oui		
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 <input type="checkbox"/> Yes Non 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"/>
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 checked="" 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"/>

TBS/SC 350-103(2004/12)

Security Classification / Classification de sécurité
Protected B

Canada



Government of Canada
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Contract Number / Numéro d'achat

G9292 1906891 214643

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PART A / PARTIE A (Fournisseur)	
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? If Yes, indicate the level of sensitivity. Dans l'affirmative, indiquer le niveau de sensibilité.	<input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes Oui
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? Short Title(s) of material / Titre(s) abrégé(s) du matériel Document Number / Numéro du document.	<input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes Oui
PART D - PERSONNEL FOURNISSEUR / PARTIE D - 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"/> TOP SECRET - SIGHT TRÈS SECRET - SIGHT	<input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL
<input type="checkbox"/> SITE ACCESS ACCÈS AUX EMPLACEMENTS	<input type="checkbox"/> SECRET SECRET
	<input type="checkbox"/> NATO SECRET NATO SECRET
	<input type="checkbox"/> TOP SECRET TRÈS SECRET
	<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET
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 unescorted personnel be used for portions of the work? Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? If Yes, will unescorted personnel be escorted? Dans l'affirmative, le personnel en question sera-t-il escorté?	<input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes Oui
PART E - GUARDIANSHIP / SUPPLIER / PARTIE E - MESURES DE PROTECTION (FURNISSEUR)	
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?	<input type="checkbox"/> No Non <input checked="" type="checkbox"/> Yes 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?	<input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes 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?	<input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes 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?	<input type="checkbox"/> No Non <input checked="" type="checkbox"/> Yes 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?	<input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes Oui

TBS/SC1 350-103(2004/12)

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PART C / PARTIE C

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 RESTRICTED	NATO CONFIDENTIAL / NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET / COSMIC TRÈS SECRET	PROTECTED / PROTÉGÉ			TOP SECRET / TRÈS SECRET
											A	B	C	
Information / Informations		✓												
IT Media / Support IT / Média Informatique		✓												
IT Data / Données Informatiques														

- 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 / Numéro du contrat

09292 014643

Security Classification / Classification de sécurité
Protected B

PART 3 AUTHORIZATION PART 3 AUTORISATION			
13 Organization Project Authority / Champ de projet de l'organisme		Titre - Titre	
Name (print) - Nom (en lettres majuscules) Nathalie Châteaux		Director BDS Ops TISMS	
Telephone No. - N° de téléphone 1-819-654-4561	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel Nathalie.H.Chateaux [NC] [nath@au.cha]	Date 15 September 2019
14 Organization Security Authority / Responsable de la sécurité de l'organisme		Signature	
Name (print) - Nom (en lettres majuscules) Yvon Garneau		Security Agent RSO	
Telephone No. - N° de téléphone 1-819-654-4561	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel yvon.garneau@service.aur.ca	Date 16 September 2019
15 Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached? Des instructions supplémentaires (p.e. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?			<input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes Oui
16 Procurement Officer / Agent d'approvisionnement		Signature	
Name (print) - Nom (en lettres majuscules)		Title - Titre	
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
17 Contracting Security Authority / Autorité contractante en matière de sécurité		Signature	
Name (print) - Nom (en lettres majuscules)		Title - Titre	
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date

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