

REQUEST FOR PROPOSAL (RFP) – COVER SHEET	
TITLE: Ergonomic assessment and occupational therapy services	
Solicitation Number:	INFC-2024/25-PS4199 AMD2
Date of RFP:	March 27, 2023
Procurement Officer:	Alexander Caro
Address for proposal delivery: Bids must be sent via email only to: E-mail: procurement-approvisionnement@infc.gc.ca	
Bid/solicitation closure:	Monday, May 6, 2024 @ 14:00 (2 PM) E.S.T.
<p>Infrastructure Canada (INFC) is requesting proposals for services as detailed in Part 3. The proposal must set out the means by which the technical, performance, time and other goals and objectives will be met, with regard to all stated requirements. INFC will consider entering into a contract with the supplier that submits the most suitable proposal as determined by the evaluation factors set out in this RFP. One (1) contract will be awarded as a result of the evaluation of the responses to this RFP. Neither the qualifying proposal that scores the highest points nor the one that contains the lowest cost will necessarily be accepted. INFC reserves the right to accept any proposal as submitted without prior negotiations.</p>	
<p>This Request for Proposal consists of the following:</p> <ul style="list-style-type: none"> This cover page; Part 1 - GENERAL INFORMATION; Part 2 - BIDDER INSTRUCTIONS; Part 3 - BID PREPARATION INSTRUCTIONS; Part 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION; Part 5 - CERTIFICATIONS AND ADDITIONAL INFORMATION; Part 6 - RESULTING CONTRACT CLAUSES. 	
Bidder's Name and Address:	
Telephone number:	E-mail:
<p>Bidder's Signature: The Bidder's signature indicates acceptance of the terms and conditions governing this Request for Proposal and certifies that the content of the attached Bidder's proposal is accurate. It also constitutes acknowledgement of receipt and acceptance of all documents listed above. The Bidder also recognizes having read and understood each and all terms and conditions in this RFP contained in the documents or incorporated by reference.</p>	
_____ Signature	_____ Date

Medium Complexity Bid Solicitation and Resulting Contract Template (MC)

Table of Contents

PART 1 - GENERAL INFORMATION	3
1.1 SECURITY REQUIREMENTS	3
1.2 STATEMENT OF WORK	3
1.3 DEBRIEFINGS	3
PART 2 - BIDDER INSTRUCTIONS	4
2.1 STANDARD INSTRUCTIONS, CLAUSES AND CONDITIONS	4
2.2 SUBMISSION OF BIDS	4
2.3 FORMER PUBLIC SERVANT	4
2.4 ENQUIRIES - BID SOLICITATION	5
2.5 APPLICABLE LAWS	5
2.6 BID CHALLENGE AND RECOURSE MECHANISMS	6
PART 3 - BID PREPARATION INSTRUCTIONS	7
3.1 BID PREPARATION INSTRUCTIONS	7
ATTACHMENT 1 TO PART 3 – PRICING SCHEDULE	9
PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION	11
4.1 EVALUATION PROCEDURES	11
4.2 BASIS OF SELECTION	11
ATTACHMENT 1 TO PART 4 - TECHNICAL CRITERIA	13
ATTACHMENT 2 TO PART 4 – CLIENT REFERENCE FORM	20
PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION	21
5.1 CERTIFICATIONS REQUIRED WITH THE BID	22
5.2 CERTIFICATIONS PRECEDENT TO CONTRACT AWARD AND ADDITIONAL INFORMATION	22
PART 6 - RESULTING CONTRACT CLAUSES	24
6.1 SECURITY REQUIREMENTS	25
6.2 STATEMENT OF WORK	25
6.3 STANDARD CLAUSES AND CONDITIONS	25
6.4 TERM OF CONTRACT	25
6.5 AUTHORITIES	26
6.6 PAYMENT	27
6.7 INVOICING INSTRUCTIONS	27
6.8 CERTIFICATIONS AND ADDITIONAL INFORMATION	28
6.9 APPLICABLE LAWS	28
6.10 PRIORITY OF DOCUMENTS	28
6.11 DISPUTE RESOLUTION	28
ANNEX "A"	29
STATEMENT OF WORK	29
ANNEX "B"	35
SECURITY REQUIREMENTS CHECK LIST	35

PART 1 - GENERAL INFORMATION

1.1 Security Requirements

1. Before award of a contract, the following conditions must be met:
 - (a) 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 A, issued by the Contract Security Program (CSP), Public Works and Government Services Canada (PWGSC)
 - (b) 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 CSP, PWGSC
 - (c) The contractor must not utilize its Information Technology systems to electronically process, produce or store protected information until the CSP, PWGSC has issued written approval. After approval has been granted or approved, these tasks may be performed up to the level of protected A
 - (d) Subcontracts which contain security requirements are not to be awarded without the prior written permission of the CSP, PWGSC.
 - (e) The contractor/offeror must comply with the provisions of the:
 - Security Requirements Check List and security guide
2. For additional information on security requirements, Bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

1.2 Statement of Work

This bid solicitation is being issued for the provision of ergonomic assessment and occupational therapy services for Infrastructure Canada for below the CKFTA threshold (including taxes, travel and living, amendments, etc.). The work to be performed is detailed under Annex "A" Statement of Work

1.3 Debriefings

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

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

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

The [2003](#) _____ (2023-06-08) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

2.2 Submission of Bids

Bids must be submitted only to the email address indicated on page 1 of this solicitation by the date, time and place indicated on page 1 of the bid solicitation.

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 FPSs, bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

Definitions

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

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

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

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

Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension? Yes () No ()

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

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

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with Contracting Policy Notice: 2019-01 and the Guidelines on the Proactive Disclosure of Contracts.

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

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

2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than 4 calendar days before the bid closing date. Enquiries received after that time may not be answered.

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

2.5 Applicable Laws

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

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

2.6 Bid Challenge and Recourse Mechanisms

- (a) Several mechanisms are available to potential suppliers to challenge aspects of the procurement process up to and including contract award.
- (b) Canada encourages suppliers to first bring their concerns to the attention of the Contracting Authority. Canada's [Buy and Sell](#) website, under the heading "[Bid Challenge and Recourse Mechanisms](#)" contains information on potential complaint bodies such as:
- Office of the Procurement Ombudsman (OPO)
 - Canadian International Trade Tribunal (CITT)
- (c) Suppliers should note that there are **strict deadlines** for filing complaints, and the time periods vary depending on the complaint body in question. Suppliers should therefore act quickly when they want to challenge any aspect of the procurement process.

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

Canada requests that the Bidder submits its bid in accordance with section 08 of the 2003 standard instructions. Bidders must provide their bid in a single transmission. Canada's email servers have the capacity to receive emails up to 20MB in size with multiple documents, up to 4MB per individual attachment.

Canada requests that the Bidder submits its bid in separately bound sections as follows:

- Section I: Technical Bid
- Section II: Financial Bid
- Section III: Certifications
- Section IV: Additional Information

Due to the nature of the bid solicitation, bids transmitted by CPC Connect service and by facsimile will not be accepted.

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

- Section I: Technical Bid (1 soft copy in PDF format)
- Section II: Financial Bid (1 soft copy in PDF format)
- Section III: Certifications (1 soft copy in PDF format)
- Section IV: Additional Information (1 soft copy in PDF format)

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

Section I: Technical Bid

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

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

Section II: Financial Bid

Bidders must submit their financial bid in Canadian Funds and in accordance with the Pricing Schedule detailed in Attachment 1 to Part 3. The total amount of Applicable Taxes must be shown separately.

Section III: Certifications

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

Section IV: Additional Information

3.1.1 Bidder's Proposed Sites or Premises Requiring Safeguarding Measures

3.1.1.1 As indicated in Part 1 under Security Requirements, the Bidder must provide the full addresses of the Bidder's and proposed individuals sites or premises for which safeguarding measures are required for Work Performance:

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

3.1.1.2 The Company Security Officer must ensure through the Contract Security Program that the Contractor and individuals hold a valid security clearance at the required level, as indicated in Part 1, clause 1.1, Security Requirements.

3.1.2 Payment of Invoices by Direct Deposit

Canada requests that bidders accept the payment of Invoices by Direct Deposit for the payment of invoices.

ATTACHMENT 1 to PART 3 – PRICING SCHEDULE

The Bidder should complete this pricing schedule and include it in its financial bid. As a minimum, the Bidder must respond to this pricing schedule by inserting in its financial bid for each of the periods specified below its quoted all-inclusive fixed per-diem rate (in Can \$) for each of the resource categories identified.

The rates specified below, when quoted by the Bidder, include the total estimated cost of all travel that may need to be incurred for:

- a. Work described in Part 6, Resulting Contract Clauses, of this bid solicitation required to be performed within the National Capital Region (NCR) and the Greater Montreal Area (Montreal). The NCR is defined in the *National Capital Act*, R.S.C. 1985, c. N-4, S.2.

These expenses cannot be charged directly and separately from the professional fees to any contract that may result from the bid solicitation.

The inclusion of volumetric data in this document does not represent a commitment by Canada that Canada's future usage of the services described in the bid solicitation will be consistent with this data.

Occupational Therapy Services		
Period 1 - From the signage of the contract to 31 March 2025		
Deliverables	All inclusive in-person fixed rate per hour	All inclusive virtual fixed rate per hour
Assessment (A)		
Report (B)		
Follow-up support services (C)		
<u>Deliverables Total Price (A+B+C)</u>		
Option Period 2 - 1 April 2025 to 31 March 2026		
Assessment (A)		
Report (B)		
Follow-up support services (C)		
<u>Deliverables Total Price (A+B+C)</u>		
Option Period 3 - 1 April 2026 to 31 March 2027		
Assessment (A)		
Report (B)		
Follow-up support services (C)		
<u>Deliverables Total Price (A+B+C)</u>		

Ergonomic Assessment Services		
Period 1 - From the signage of the contract to 31 March 2025		
Deliverables	All inclusive in-person fixed rate per hour	All inclusive virtual fixed rate per hour
Assessment (A)		
Report (B)		
Follow-up support services (C)		
<u>Deliverables Total Price (A+B+C)</u>		
Option Period 2 - 1 April 2025 to 31 March 2026		
Assessment (A)		
Report (B)		
Follow-up support services (C)		
<u>Deliverables Total Price (A+B+C)</u>		
Option Period 3 - 1 April 2026 to 31 March 2027		
Assessment (A)		
Report (B)		
Follow-up support services (C)		
<u>Deliverables Total Price (A+B+C)</u>		

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- b) An evaluation team composed of representatives of Canada will evaluate the bids.

4.1.1 Technical Evaluation

4.1.1.1 Mandatory Corporate Criteria

Refer to Attachment 1 to Part 4

4.1.1.2 Mandatory Technical Criteria

Refer to Attachment 1 to Part 4

4.1.1.3 Point Rated Technical Criteria

Refer to Attachment 1 to Part 4

4.1.2 Financial Evaluation

SACC Manual Clause [A0220T](#) (2014-06-26), Evaluation of Price

For bid evaluation and contractor(s) selection purposes only, the evaluated price of a bid will be determined in accordance with the Pricing Schedule detailed in Attachment 1 to Part 3.

4.2 Basis of Selection

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
2. Bids not meeting (a) or (b) 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 60% for the technical merit and 40% 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 60%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price* and the ratio of 40%.

**The lowest evaluated price will be determined by the addition of all "Deliverables Total Price" of virtual and in person hourly rates from ATTACHMENT 1 to PART 3 – PRICING SCHEDULE.*

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

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

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

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

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

ATTACHMENT 1 TO PART 4 - TECHNICAL CRITERIA

Mandatory Corporate Criteria

Proposals must meet ALL of the following mandatory criteria for their submissions to be considered for further evaluation. Failure on the part of Bidders to meet these requirements will result in their proposals being deemed non-compliant, with the proposal being given no further consideration.

MANDATORY CORPORATE CRITERIA		MET	NOT MET
MCC1	<p>Bidder Certification Using Attachment 2 to Part 4 Client Reference Form, the Bidder must provide four (4) project summaries describing in detail their experience in successfully providing Occupational Therapy Services (2) and Ergonomic Assessments (2). These projects must have been completed within the last five (5) years.</p> <p>Within each project summary provided, the Bidder must indicate:</p> <ul style="list-style-type: none"> Project title Project manager/team lead name Client name, size and current phone number or email address Scope and intent of the project Dates and duration of the project Summary of the methodology used Names and role of the Bidder's internal resources used Closure. <p>Canada will contact the references to validate the information provided.</p> <p>References that are unable to respond will disqualify the Bidder's submission – please ensure contact information is up to date.</p>		
	Bidder Response:		
MCC2	<p>Delivery Locations The Bidder must demonstrate that it is able to provide occupational therapy services and Ergonomic Assessments, in-person* or virtually, as requested by the project authority</p> <p><i>*in-person at INFC offices in the National Capital Region (180 Kent and 427 Laurier) and in the Greater Montreal Area (800 René- Lévesque West);</i></p>		
	Bidder Response:		
MCC3	<p>Official Languages The Bidder must propose resources able to provide the requested services in both official languages at the advanced level (determined using ATTACHMENT 3 TO PART 4 - LANGUAGE PROFICIENCY GRID).</p>		

	Bidder Response:		
--	-------------------------	--	--

Mandatory Technical Criteria

The bid must meet the mandatory technical criteria specified below. The Bidder must provide the necessary documentation to support compliance with this requirement.

Bids which fail to meet the mandatory technical criteria will be declared non-responsive. Each mandatory technical criterion should be addressed separately.

The bidder must provide at least two (2) versions of the following "RESOURCE EVALUATION" table and two (2) versions of the "POINT-RATED CRITERIA" table. One for the proposed resource for Occupational Therapy Services, and another for Ergonomic Assessments. Additional resources for each type of service will be accepted if they are for different provinces in order to ensure national coverage. In that case, among all additional proposed resources that meet mandatory criteria, only the one with the highest score for Occupational Therapy Services and the one with the highest score for Ergonomic Assessments will be used to evaluate the "POINT-RATED CRITERIA merit result.

RESOURCE EVALUATION	
Resource Category	<i>Insert "Occupational Therapy Services" or "Ergonomic Assessment"</i>
Name of Proposed Resource	<insert name>
MANDATORY CRITERIA	
MC1	<p>The Bidder must demonstrate that the proposed resources have provided the services indicated in the resource category in both official languages at the advanced level per the ATTACHMENT 3 TO PART 4 - LANGUAGE PROFICIENCY GRID</p> <ul style="list-style-type: none"> • Verbal and written communications. • All documentation (individualized assessments, job analysis, ergonomic assessment reports, follow-up recommendations, etc.)
	Bidder Response:
MC2	<p>The Bidder must provide evidence that the proposed resource(s) have a valid Security Clearance at the Reliability status security screening level. Resources must maintain that level for the duration of the contract.</p> <p>The Bidder must adhere to the privacy and security requirements found within the <i>Access to Information Act</i> and the <i>Privacy Act</i>, with proper storage of all data on Canadian servers. This includes, but is not limited to, all personal information, assessments and recommendations (in development, in use, and in storage).</p>
	Bidder Response:
MC3	<p>The Bidder must provide evidence that the proposed resource(s):</p> <ul style="list-style-type: none"> - For the occupational therapy service category: holds a valid certification/accreditation (e.g., certification/accreditation that is recognized by the Association of Canadian

	<p>Occupational Therapy Regulatory Organizations (ACOTRO) or other international certifying bodies).</p> <p>- For the ergonomic assessment service category: holds a university degree, college certificate or diploma in Ergonomics, Kinesiology, Physiotherapy, Occupational Therapy or Occupational Health Nursing from a recognized Canadian Institution or the equivalent as established by a recognized Canadian academic credentials assessment service, if obtained outside Canada.</p>
	<p>Bidder Response:</p>
MC4	<p>The proposed resource(s) must have successfully provided the services:</p> <ul style="list-style-type: none">• in-person in different regions across Canada (E.g.,: National Capital Region (NCR), Greater Montreal Area, etc.)• virtually in other areas across Canada. <p>Using Attachment 2 to Part 4 Client Reference Form, the bidder must provide 2 examples per resource proposed. Canada reserves the right to verify the information provided.</p>
	<p>Bidder Response:</p>

Point Rated Technical Criteria

Bids which meet all the mandatory technical criteria will be evaluated and scored as specified in the tables inserted below.

Bids will be evaluated and scored as specified in the tables inserted below.

Bids which fail to obtain the required minimum number of points specified will be declared non-responsive. Each point rated technical criterion should be addressed separately.

POINT-RATED CRITERIA				
		Points	Bidder Substantiation	Cross Reference to Proposal
R1	<p>The Bidder must provide up to 3 examples of completed reports that include at least the following elements:</p> <p><i>Name of employee,</i> <i>Name of specialist providing services,</i> <i>Type of service (ergonomic assessment or occupational therapy services),</i> <i>Language of service (English or French),</i> <i>Date, time and location of the delivery of the service,</i> <i>Duration of the service delivery,</i> <i>Reason for assessment,</i> <i>Nature of the employee's work,</i> <i>Overview of environmental factors (e.g., lighting, noise, hazards),</i> <i>Findings/observations,</i> <i>Recommendations</i></p> <p>Points will be assigned as follows:</p> <p>The Bidder does not provide an example with the described elements, or elements are missing. 0 points</p> <p>The Bidder provides 1 example with the described elements. 1 points</p> <p>The Bidder provides 2 examples with the described elements. 3 points</p> <p>The Bidder provides 3 examples with the described elements. 5 points</p>	/5		

<p>R2</p>	<p>The bidder must demonstrate that the proposed resource has experience in providing virtual and in-person services for the services indicated in the resource category.</p> <p>Points will be assigned as follows:</p> <p>Criteria not met and/or information not provided or not relevant. 0 point</p> <p>Less than 24 months of experience. 5 points</p> <p>Over 24 months but less than 48 months of experience . 10 points.</p> <p>Over 48 months of experience. 20 points</p>	<p>/20</p>		
<p>R3</p>	<p>The bidder must demonstrate that the proposed resource has worked on minimum two (2) up to a maximum of five (5) similar appraisal services within the past 5 years:</p> <ul style="list-style-type: none"> • to an organization having a minimum of 500 employees; • Service provided in multiple national work locations. <p>Using the “Attachment 2 to part 4 Client Reference Form”, the bidder must provide client reference information. References must have completed and signed the form prior to bid closure.</p> <p>Points will be assigned as follows:</p> <p>One (1) extra point will be awarded for any additional examples of appraisal services for which points are granted according to the criteria below, up to a maximum of three (3) additional points.</p> <p>Criteria not met and/or information not provided or not relevant. 0 point</p> <p>Description(s) demonstrate experience providing services to organizations of 500 employees or less, without national coverage (1 city). 2 points in total</p> <p>Description(s) demonstrate experience providing services to organizations having a minimum of 500 employees at some work</p>	<p>/10</p>		

	<p>locations nationally (at least 2 cities). 4 points in total</p> <p>Description(s) demonstrate experience providing services to organizations having a minimum of 500 employees at multiple national work locations (3+ cities). 7 points in total</p>			
R4	<p>For services indicated in the resource category, the bidder must describe</p> <ol style="list-style-type: none"> 1. how an employee's needs are determined; 2. how its assessments and recommendations are developed; 3. what type of information these assessments and recommendations include; 4. and what processes are recommended to the Project Authority to implement recommendations. <p>Points will be assigned as follows:</p> <p>Description not provided or not relevant. 0 point</p> <p>Description provided and addresses 1 or 2 elements. 5 points</p> <p>Description provided and addresses 3 elements. 10 points</p> <p>Description provided and addresses all of the 4 elements. 15 points</p>	/15		
R5	<p>The Bidder must provide evidence that the proposed resource(s) for ergonomic assessment services holds a recognized designation from a Canadian or international certifying body.</p> <p>Points will be assigned as follows:</p> <p>The resource does not hold any recognized designation 0 point</p>	/5		

	<p>The resource holds the Associate Ergonomist (AE) designation or any other recognized designation from a Canadian or international certifying body. 2 points</p> <p>The resource holds the Canadian Certified Professional Ergonomist (CCPE) designation. 5 points</p>			
	Maximum Score	/55		
	Pass Mark	33/55		
	Bidder's Score			

ATTACHMENT 2 TO PART 4 – CLIENT REFERENCE FORM

The following is the client reference form that will be used to evaluate R3. Projects that cannot be validated by the provided references will not be included in the evaluation and therefore will be deemed not responsive.

Client Reference Form <i>(Please select one of the following: occupational therapy services or ergonomic assessment)</i>			
Bidder Name		Name of Proposed Resource	
Client Identification	Project Title		
	Organization Name		
	Organization Size		
	Client Contact Name		
	Title		
	E-Mail Address		
	Telephone number		
	Contract period		
Brief Project Summary			
Role of the proposed resource and relevant duties performed.			
Questions for the Reference			
1. Did the indicated resource provide <i>(Please select one of the following: ergonomic assessment or occupational therapy services)?</i>		<input type="radio"/> Yes	<input type="radio"/> No
2. In how many number of cities in Canada did the indicated resource provide the services?		Number of cities:	
3. Were your expectations of quality met for the services?		<input type="radio"/> Yes	<input type="radio"/> No
Reference signature			
(Name and title)		(Digital signature including date)	

ATTACHMENT 3 TO PART 4 LANGUAGE PROFICIENCY GRID

Legend	Oral	Comprehension	Written
Basic	<p>A person speaking at this level can:</p> <ul style="list-style-type: none"> ask and answer simple questions; give simple instructions; and give uncomplicated directions relating to routine work situations. 	<p>A person reading at this level can:</p> <ul style="list-style-type: none"> fully understand very simple texts; grasp the main idea of texts about familiar topics; and read and understand elementary points of information such as dates, numbers, or names from relatively more complex texts to perform routine job-related tasks. 	<p>A person writing at this level can:</p> <ul style="list-style-type: none"> write isolated words, phrases, simple statements or questions on very familiar topics using words of time, place or person.
Intermediate	<p>A person speaking at this level can:</p> <ul style="list-style-type: none"> sustain a conversation on concrete topics; report on actions taken; give straightforward instructions to employees; and provide factual descriptions and explanations. 	<p>A person reading at this level can:</p> <ul style="list-style-type: none"> grasp the main idea of most work-related texts; identify specific details; and distinguish main from subsidiary ideas. 	<p>A person writing at this level can:</p> <ul style="list-style-type: none"> deal with explicit information on work-related topics since they have sufficient mastery of grammar and vocabulary.
Advanced	<p>A person speaking at this level can:</p> <ul style="list-style-type: none"> support opinions; and understand and express hypothetical and conditional ideas 	<p>A person reading at this level can:</p> <ul style="list-style-type: none"> understand most complex details, inferences and fine points of meaning; and have a good comprehension of specialized or less familiar material. 	<p>A person writing at this level can:</p> <ul style="list-style-type: none"> write texts where ideas are developed and presented in a coherent manner.

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

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

5.1 Certifications Required with the Bid

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

5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all bidders must provide with their bid, **if applicable**, the 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.

5.2 Certifications Precedent to Contract Award and Additional Information

The certifications and additional information listed below should be submitted with the bid but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame provided will render the bid 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) (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

5.2.2 Security Requirements – Required Documentation

In accordance with the [requirements of the Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>), the Bidder must provide a completed Contract Security Program Application for Registration (AFR) form to be given further consideration in the procurement process.

Bidders are reminded to obtain the required security clearance and, as applicable, security capabilities promptly. As indicated above, bidders who do not provide all the required information at bid closing will be given the opportunity to complete any missing information from the AFR form within a period set by the Contracting Authority. If that information is not provided within the timeframe established by the Contracting Authority (including any extension granted by the Contracting Authority in its discretion), or if Canada requires further information from the bidder in connection with assessing the request for security clearance (i.e., information not required by the AFR form), the Bidder will be required to submit that information within the time period established by the Contracting Authority, which will not be less than 48

hours. If, at any time, the Bidder fails to provide the required information within the timeframe established by the Contracting Authority, its bid will be declared non-compliant.

5.2.3 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's](#) website.

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

5.2.4 Additional Certifications Precedent to Contract Award

Refer to ATTACHEMENT 1 TO PART 5 - CERTIFICATIONS

5.2.4.1 Status and Availability of Resources

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

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

5.2.4.2 Education and Experience

SACC *Manual* clause [A3010T](#) _____ (2010-08-16) Education and Experience

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

ATTACHMENT 1 TO PART 5 - CERTIFICATIONS

The Bidder must sign the following certifications for EACH proposed resources.

1. CERTIFICATION OF EDUCATION AND EXPERIENCE

The bidder certifies that all the information provided in the résumés and supporting material proposed for completing the subject work, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Contractor to be true and accurate. Furthermore, the Contractor warrants that every individual proposed by the Contractor for the requirement is capable of performing the Work described. Canada reserves the right to verify this information at any time.

Name of the Resource: _____

Print name of authorized individual & sign above

Date

2. CERTIFICATION OF AVAILABILITY OF PERSONNEL

The Contractor certifies that, the persons proposed in the proposal will be available to commence performance of the work within a reasonable time from the date of issuance of the valid contract and will remain available to perform the work in relation to the fulfillment of the requirement.

Print name of authorized individual & sign above

Date

3. CERTIFICATION OF STATUS OF PERSONNEL

If the Contractor has proposed any individual who is not an employee of the Contractor, the Contractor certifies that it has permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. At any time during the Contract Period the Contractor must, upon request from the Contracting Authority, provide the written confirmation, signed by the individual, of the permission that was given to the Contractor of his/her availability. Failure to comply with the request may result in a default under the Contract in accordance with the General Conditions.

Print name of authorized individual & sign above

Date

4. CERTIFICATION OF LANGUAGE - BILINGUAL

The Contractor certifies that the proposed resource(s) in response to this draft Task Authorization is/are fluent in both official languages of Canada (French and English). The individual(s) proposed must be able to communicate orally and in writing in French and English without any assistance and with minimal errors.

Print name of authorized individual & sign above

Date

PART 6 - RESULTING CONTRACT CLAUSES

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

6.1 Security Requirements

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

1. The contractor/offeror must, at all times during the performance of the contract/standing offer, hold a valid designated organization screening (DOS) with approved document safeguarding at the level of **protected A**, issued by the Contract Security Program (CSP), 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 CSP, PWGSC
3. The contractor **must not** utilize its Information Technology systems to electronically process, produce or store **protected** information until the CSP, PWGSC has issued written approval. After approval has been granted or approved, these tasks may be performed up to the level of **protected A**
4. Subcontracts which contain security requirements are **not** to be awarded without the prior written permission of the CSP, PWGSC
5. The contractor/offeror must comply with the provisions of the:
 1. Security Requirements Check List and security guide

6.2 Statement of Work

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

6.3 Standard Clauses and Conditions

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

6.3.1 General Conditions

[2010B](#) _____ (2022-12-01), General Conditions - Professional Services (Medium Complexity) apply to and form part of the Contract.

6.3.2 Supplemental General Conditions

[4008](#) _____ (2008-12-12), Personal Information

[4009](#) _____ (2022-12-01), Professional services: Medium complexity

[4013](#) _____ (2022-06-20), Compliance with on-site measures, standing orders, policies, and rules

[4014](#) _____ (2022-06-20), Suspension of the work

6.4 Term of Contract

6.4.1 Period of the Contract

The period of the Contract is from date of Contract to March 31st, 2025 inclusive

6.4.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to 2 additional 1 year period(s) under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

Canada may exercise this option at any time by sending a written notice to the Contractor at least 1 calendar days before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

6.5 Authorities

6.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: _____

Title: _____

Public Works and Government Services Canada

Acquisitions Branch

Directorate: _____

Address: _____

Telephone: ____ _

Facsimile: ____ _

E-mail address: _____

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

6.5.2 Project Authority

The Project Authority for the Contract is:

Name: _____

Title: _____

Organization: _____

Address: _____

Telephone: ____ _

Facsimile: ____ _

E-mail address: _____

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

6.5.3 Contractor's Representative

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

6.6 Payment

6.6.1 Basis of Payment

Canada will pay the Contractor on a monthly basis for work performed during the month covered by the invoice in accordance with the payment provisions of the Contract if:

- a. an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all such documents have been verified by Canada;
- c. the Work performed has been accepted by Canada.

6.6.2 Limitation of Expenditure

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

6.6.3 Electronic Payment of Invoices – Contract

The Contractor accepts to be paid by Direct Deposit (Domestic and International)

6.7 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 the release document and any other documents as specified in the Contract;
 - b. 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 Project Authority of the Contract for certification and payment.

6.8 Certifications and Additional Information

6.8.1 Compliance

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

6.9 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in _____ (*insert the name of the province or territory as specified by the Bidder in its bid, if applicable*).

6.10 Priority of Documents

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

- (a) the Articles of Agreement;
- (b) the supplemental general conditions
 - [4008](#) (2008-12-12), Personal Information
 - [4009](#) (2022-12-01), Professional services: Medium complexity
 - [4013](#) (2022-06-20), Compliance with on-site measures, standing orders, policies, and rules
 - [4014](#) (2022-06-20), Suspension of the work
- (c) the general conditions
 - [2010B](#) (2022-12-01), General Conditions - Professional Services (Medium Complexity)
- (d) Annex A, Statement of Work;
- (e) Annex B, Security Requirements Check List (*if applicable*);
- (h) the Contractor's bid dated _____ (*insert date of bid*) (*If the bid was clarified or amended, insert at the time of contract award: “, as clarified on _____” or “, as amended on _____” and insert date(s) of clarification(s) or amendment(s) including its Inuit Benefits Plan. (if applicable)*).

6.11 Dispute Resolution

- (a) The parties agree to maintain open and honest communication about the Work throughout and after the performance of the contract.
- (b) The parties agree to consult and co-operate with each other in the furtherance of the contract and promptly notify the other party or parties and attempt to resolve problems or differences that may arise.
- (c) If the parties cannot resolve a dispute through consultation and cooperation, the parties agree to consult a neutral third party offering alternative dispute resolution services to attempt to address the dispute.
- (d) Options of alternative dispute resolution services can be found on Canada's Buy and Sell website under the heading "[Dispute Resolution](#)".

ANNEX "A"

STATEMENT OF WORK

REQUIREMENT

1.1 Title

Ergonomic assessment and occupational therapy services

1.2 Objective

INFC is looking for a single contractor that has resources to offer ergonomic assessment and occupational therapy services to its employees.

The selected contractor will assist INFC employees in determining the tools they need to successfully complete their work, especially employees who may have functional limitations (e.g., employees with visible and invisible disabilities, whether temporary, episodic, or permanent).

Interpretation

Ergonomic assessment services

Ergonomic assessment services refer to assessments of the workspace and tools, which include recommendations for workspace setup, equipment use/replacement or alternate solutions to help INFC employees avoid or minimize pain and injuries while working.

An ergonomic assessment may also include:

- Adjustments of ergonomic equipment and required tools to complete work responsibilities.
- ergonomic-related training, such as proper positioning while seated and standing.

Occupational therapy services

Occupational therapy services refer to evaluating employees' aptitudes and functional limitations with regards to work-related tasks through observation, one-on-one interview and formal assessments, with the objective to maximize independency.

Occupational therapy services may be used when other resources and/or services cannot assist employees in determining the tools they need to successfully complete their work.

Services may include developing individualized intervention plans, such as return-to work programs for employees who may require additional support reintegrating into the workplace.

1.3 Background

INFC is committed to offering a barrier-free, inclusive, and accessible workplace. As the department is growing, it is important that it provides the resources needed to help employees do their job, including those with disabilities — whether temporary, episodic, or permanent.

Treasury Board of Canada's Office of Public Service Accessibility and some federal departments are encouraging the use of occupational therapy services to better support employees who may require additional support and guidance to find the necessary tools and strategies to help them succeed in their job.

In order to facilitate coordination and ensure consistency in the delivery of services, the Department is looking for a single contractor that has resources to offer ergonomic assessment and occupational therapy services to its employees.

The following is a summary of the steps of the assessment process after contract confirmation:

- a) The Project Authority sets a kick-off meeting with the selected contractor to set expectations (including estimating the time required for each type of service) and adjust the report template to meet the Project Authority's needs.
- b) INFC employee contacts the Project Authority about the need for service.
- c) The Project Authority meets with the employee to identify their needs to determine the type of service required (ergonomic assessment or occupational therapy services), the method of delivery (in-person or virtual) and agree on a date, time and location for the service to be offered by the selected contractor.
- d) The Project Authority sends the request for service to the selected contractor via email at least 10 business days in advance. The request for service includes information such as the name of the employee, the type of service, the language of service, the reason for assessment, the method of delivery, and the desired date, time and location.
- e) The selected contractor confirms availability to provide the service by replying to the Project Authority's email within maximum 2 business days. In case of a scheduling conflict, the Project Authority and the selected contractor agree on a date, time, and location for the service no later than the end of the 2nd business day following the day on which the selected contractor replied to the Project Authority.
- f) The Project Authority secures a meeting room in INFC offices, if requested by the selected contractor.
- g) The selected contractor completes the requested service at the specified date, time, and location. The Project Authority may accompany the employee during the delivery of service, if requested by the employee.
- h) The selected contractor must produce and send the employee assessment related report to the Project Authority no later than the end of the 7th business day following the completion of the service. The Project Authority acknowledges that some disabilities may be more complex and require more time to assess (for example, in the case of occupational therapy services). In this case, the selected contractor must receive approval from the Project Authority to submit the report later.
- i) The Project Authority acknowledges receipt of the report via email within 2 business days or request additional details if necessary.
- j) If required, after an employee report has been reviewed, the Project Authority may approve a virtual follow up meeting between the selected contractor and the employee. The meeting arrangements will be coordinated by Project Authority with the employee and the selected contractor.
- k) The first week of each month, the selected contractor sends an invoice to the Project Authority for all services completed during the previous month for which the receipt of the report has been acknowledged by the Project Authority.
- l) The Project Authority validates all completed services and approves the invoice for processing. If needed, the Project Authority will seek additional details regarding the invoice.

Note: In this document, "Project Authority" refers to the INFC team responsible for coordinating ergonomic assessment and occupational therapy requests between the selected contractor and employees. The term "services" refers to both ergonomic assessment and occupational therapy services.

1.4 Scope

INFC has approximately 1,500 employees and is growing. The majority of employees are in the National Capital Region (Ottawa) and Greater Montreal Area (Montreal) with some regional presence.

In-person services would be offered to employees working in Ottawa (for example, 180 Kent and 427 Laurier St.) and Montreal (for example, 800 René-Lévesque West). Approximately 75% of INFC employees work in Ottawa, while approximately 10% work in Montreal.

Virtual services should be offered to employees working outside of Ottawa and Montreal (about 15% of INFC employees). Virtual services must also be offered to a minority of employees from Ottawa and Montreal working full-time from home.

Based on current trends, the Project Authority has been receiving an average of 8-10 service requests per month. It is anticipated that ergonomic assessments will constitute the majority of requests. However, occupational therapy services may be required in more complex cases (for example, return to work).

1.5. Tasks

The following are the tasks to be performed by the selected contractor. A description of the Project Authority's tasks are available in Section 1.3 "Background" and Section 1.7 "Client Support".

Upon signature of the Contract (one-time)

The selected contractor must attend a kick-off meeting with the Project Authority to set expectations (including estimating the time required for each type of service) and adjust the report template to meet the Project Authority's needs.

Before the delivery of service

The selected contractor confirms availability to provide the service by replying to the Project Authority's email within a maximum of 2 business days. In case of a scheduling conflict, the Project Authority and the selected contractor agree on a date, time, and location for the service no later than the end of the 2nd business day following the day on which the selected contractor replied to the Project Authority.

Delivery of service

The selected contractor must complete the requested service at the specified date, time, and location.

After the delivery of service

The selected contractor must produce and send the employee assessment related report to the Project Authority no later than the end of the 7th business day following the completion of the service. The Project Authority acknowledges that some disabilities may be more complex and require more time to assess (for example, in the case of occupational therapy services). In this case, the selected contractor must receive approval from the Project Authority to submit the report later.

If required, after an employee report has been reviewed, the Project Authority may approve a virtual follow up meeting between the selected contractor and the employee. The meeting arrangements will be coordinated by Project Authority with the employee and the selected contractor.

1.6 Constraints

The selected contractor will be required to complete the work within the following constraints:

- Services are to be provided from Monday to Friday, between 7 a.m. and 5 p.m. (EST).
- Services are to be offered:
 - In-person at INFC offices in Ottawa (for example, 180 Kent and 427 Laurier) and Montreal (for example, 800 René-Lévesque West); and
 - Virtually in other locations across Canada (please see section 1.5 for further details).
- As indicated in section 1.7 "Client Support", the type of service and the method of delivery (in-person or virtual) is to be determined by the Project Authority.
- **Education/Certification/accreditation:**

- Specialists conducting ergonomic assessments must hold a university degree, college certificate or diploma in Ergonomics, Kinesiology, Physiotherapy, Occupational Therapy or Occupational Health Nursing from a recognized Canadian Institution or the equivalent as established by a recognized Canadian academic credentials assessment service, if obtained outside Canada.
 - Specialists providing occupational therapy services must hold the appropriate certification/accreditation (e.g., certification/accreditation that is recognized by the Association of Canadian Occupational Therapy Regulatory Organizations (ACOTRO) or other international certifying bodies).
- The selected contractor must be able to communicate fluently orally and in writing in the official language (English or French) of the Project Authority and INFC employees receiving services.
 - The service must adhere to the Security Requirements in the *Access to Information Act* and the *Privacy Act*, with proper storage of INFC employee information on Canadian servers.
 - The selected contractor must investigate and address any service related issues raised in the event of a complaint at his own expenses.
 - The selected contractor must agree that a third party (INFC employee trusted person) attends ergonomic assessment or occupational therapy services, as requested by INFC employees, without prior notice.
 - No workspace at the INFC offices will be made available to the selected contractor, except for meeting rooms with the Project Authority and INFC employees.
 - The selected contractor must use its own equipment, software and internet access for the performance of this contract.

1.7 Client Support

The Project Authority will provide the following support to the selected contractor:

Upon signature of the Contract (one-time)

The Project Authority will attend a kick-off meeting with the selected contractor to set expectations (including estimating the time required for each type of service) and adjust the report template to meet the Project Authority's needs

Before the delivery of service

The Project Authority will receive service requests from INFC employees. The Project Authority will then meet with the employee to identify their needs to determine the type of service required (ergonomic assessment or occupational therapy services), the method of delivery (in-person or virtual) and agree on a date, time and location for the service to be offered by the selected contractor.

At least 10 business days in advance, the Project Authority will notify the selected contractor via email of the need for service, including:

- the name of the employee
- the type of service (ergonomic assessment or occupational therapy);
- the language of service (English or French);
- the reason for assessment; and
- the method of delivery:
 - for in-person services: desired date, time, and location (address of INFC office);
 - for virtual services: desired date, time, city and province or territory from which INFC employee receives virtual service.

Delivery of service

The Project Authority will secure meeting rooms in INFC offices at the request of the selected contractor.

The Project Authority will accompany the employee during the delivery of service, if requested by the employee.

After the delivery of service

The Project Authority will acknowledge receipt of the report via email within 2 business days or request additional details if necessary.

If required, after an employee report has been reviewed, the Project Authority may approve a virtual follow up meeting between the selected contractor and the employee. The meeting arrangements will be coordinated by Project Authority with the employee and the selected contractor.

The Project Authority validates all completed services and approves the invoice for processing. If needed, the project authority could demand additional details regarding the invoice.

1.8 Deliverables

- Assessments
 - a. Ergonomic
 - b. Occupational therapy services.
- Provide a detailed report including recommendations. Reports must include at least the following elements:
 - Name of employee
 - Name of specialist providing services
 - Type of service (ergonomic assessment or occupational therapy services)
 - Language of service (English or French)
 - Date, time and location of the delivery of the service
 - Duration of the service delivery
 - Reason for assessment
 - Nature of the employee's work
 - Overview of environmental factors (e.g., lighting, noise, hazards)
 - Findings/observations
 - Recommendations
- Virtual support services as and when required.

1.9 Travel

The Project Authority will not pay for any travel or living expenses (including parking) for the selected contractor to complete the work.

1.10 Security Requirements

- For in-person services, security escort will be provided by the INFC employee or the Project Authority.
- The selected contractor must store all data related to the work on servers located within Canada. This includes but is not limited to reports (in development, in use, and in storage).

- The selected contractor personnel requiring access to protected information, assets or work site(s) must each hold a valid reliability status, granted or approved by Public Services and Procurement Canada's (PSPC) Contract Security Program (CSP).

1.11 Meetings

As part of this Contract, the selected contractor and the Project Authority will take part in the following meetings:

- Kick-off meeting within one week of the contract confirmation the selected contractor to set expectations (including estimating the time required for each type of service) and adjust the report template to meet the Project Authority's needs.
- Meetings with the INFC employees to offer the services.
- If required, follow-up meetings after the provision of the report may be arranged with INFC employees only by approval of the Project Authority.
- Meetings related to complaints about the services performed as part of this Contract, if any.
- Other meetings between the selected contractor and the Project Authority will be on an on-demand basis and as required throughout the length of the contract.

1.12 Official Languages

The Department is under the obligation to respect the spirit and the letter of the *Official Languages Act*. It is therefore imperative that the selected contractor offers services in both official languages (English and French) to communicate verbally and in writing (all material including reports and recommendations) in the preferred official language of the Project Authority and INFC employees receiving the service.

ANNEX "B"

SECURITY REQUIREMENTS CHECK LIST



Government of Canada
Gouvernement du Canada

Contract Number / Numéro du contrat PS-4199
Security Classification / Classification de sécurité Unclassified

SECURITY REQUIREMENTS CHECK LIST (SRCL)

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

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE		
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine Infrastructure Canada	2. Branch or Directorate / Direction générale ou Direction Transformation - Accessibility Hub	
3. a) Subcontract Number / Numéro du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail Contractor to provide occupational therapy and ergonomic assessment services on an on demand basis to INFC employees (virtually and in-person).		
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?	<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?	<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
6. Indicate the type of access required / Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)	<input type="checkbox"/> No Non	<input checked="" type="checkbox"/> Yes Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.	<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?	<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable À ne pas diffuser <input type="checkbox"/>		
Restricted to: / Limité à: <input type="checkbox"/> Specify country(ies): / Préciser le(s) pays:	Restricted to: / Limité à: <input type="checkbox"/> Specify country(ies): / Préciser le(s) pays:	Restricted to: / Limité à: <input type="checkbox"/> 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 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/GCT 350-103(2004/12)

Security Classification / Classification de sécurité
Unclassified





Government of Canada
Gouvernement du Canada

Contract Number / Numéro du contrat PS-4199
Security Classification / Classification de sécurité Unclassified

PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS?
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité: No / Non 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 : No / Non Yes / Oui

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

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

<input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITE	<input type="checkbox"/> CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/> SECRET SECRET	<input type="checkbox"/> TOP SECRET TRES SECRET
<input type="checkbox"/> TOP SECRET - SIGINT TRES SECRET - SIGINT	<input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/> NATO SECRET NATO SECRET	<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRES SECRET
<input type="checkbox"/> SITE ACCESS ACCES AUX EMPLACEMENTS			

Special comments:
Commentaires spéciaux : _____

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.
REMARQUE: Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

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

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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



Government of Canada
Gouvernement du Canada

Contract Number / Numéro du contrat PS-4199
Security Classification / Classification de sécurité Unclassified

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

For users completing the form manually use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.
Les utilisateurs qui remplissent le formulaire manuellement doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form online (via the Internet), the summary chart is automatically populated by your responses to previous questions.
Dans le cas des utilisateurs qui remplissent le formulaire en ligne (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

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

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).