

## SECTION A

### BIDDER INSTRUCTIONS, INFORMATION AND CONDITIONS

This request for proposal (RFP) is issued by Human Resources and Skills Development Canada (HRSDC).

#### ACCEPTANCE OF TERMS AND CONDITIONS

A proposal indicates that the Bidder agrees to be bound by the instructions, information and conditions in their entirety as they appear in this RFP. No other terms and conditions included in the Bidder's proposal will be applicable to the resulting contract notwithstanding the fact that the Bidder's proposal may become part of the resulting contract.

#### ENQUIRIES REGARDING THE BID SOLICITATION

To ensure the integrity of the competitive bid process, enquiries and other communication regarding this procurement are to be directed **only** to the Contracting Authority. Enquiries and other communication are not to be directed to any other government official(s). Failure to comply with this condition during the solicitation period may (for that reason alone) result in the disqualification of the proposal.

Enquiries **MUST** be received **no later than five calendar days** prior to bid closing date to allow sufficient time to provide a response. Enquiries received after that time may not be answered prior to the bid closing date.

To ensure consistency and quality of information provided to Bidders, provision will be made to provide, simultaneously to all Bidders to which this RFP has been sent, any information with respect to significant inquiries received and the replies to such inquiries without revealing the sources of the enquiries.

#### PROPOSAL COSTS

No payment shall be made for costs incurred in the preparation and submission of a proposal in response to this RFP.

No costs incurred before receipt of a signed contract or specified written authorization from the Contracting Authority can be charged to any resultant contract.

#### REVISIONS

After the RFP closing date, no revisions to the proposal will be accepted. During the evaluation, members of the Evaluation Team may, at their discretion, submit questions or conduct interviews with Bidders to obtain clarifications.

## **APPLICABLE LAWS**

Any resulting contract shall be interpreted and governed, and the relations between the Parties determined, by the laws in force in the Province of Ontario, Canada.

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

## **METHOD OF PAYMENT**

Payment shall be made within thirty (30) days following the date on which an invoice and substantiating documentation are received according to the terms of the contract.

## **INVOICING INSTRUCTIONS**

The invoice **MUST** clearly state the date, contract number and the description of work. Any amount to be levied against Her Majesty in respect of the GST/HST is to be shown separately on all invoices for goods supplied or services provided and will be paid by the Government of Canada. The Bidder agrees to remit any GST/HST paid or due to CRA.

## **SUBMISSION OF PROPOSALS**

All proposals to be submitted by e-mail or facsimile to the following:

Madeleine.breau

e-mail: [madeleine.breau@servicecanada.gc.ca](mailto:madeleine.breau@servicecanada.gc.ca)

or by fax : 819-994-4127

## **TERMS OF REFERENCE / STATEMENT OF WORK**

**1. Research Project Title:** What does PALS 2006 reveal about Canadians with disabilities that need informal and/or formal caregiving? 7614-08-0008

**2. Closing Date:**

This RFP will close on: **February 19, 2009**. Proposals will not be accepted after **16:00 (EST / EDT)**.

**3. Purpose of Research Project:**

The purpose of this RFP is to seek proposals for a research project that focuses on issues surrounding formal and informal care given to, and received by, adults (aged 15 and over) with disabilities in Canada. In particular, this proposed research seeks to update previous research on caregiving using the 2006 Participation and Activity Limitation Survey (PALS) data.

The objective of this research is to update and expand the knowledge on caregiving and care receiving in Canada. This research will demonstrate if caregiving is changing for Canadians with disabilities and point to future concerns in providing care to people with disabilities. The proposed research will analyze disability - and caregiving-related data collected by PALS to inform policies to improve the care of Canadians with disabilities. This research will also serve to inform readers about which aspects of Canadian caregiving and care receiving are not yet well understood and consequently require further research.

**4. Background:**

The Government of Canada places the goal of full social participation at the core of its approach to disability. In emphasizing participation, it recognizes that a disability is often the result of social/environmental barriers, rather than individual characteristics. Through its policies and initiatives, the Government of Canada is continually working to promote the full participation of all its citizens.

In order to participate fully in Canadian society, some people with disabilities require assistance in carrying out daily activities. This aid can include, but is not limited to, activities such as helping to prepare meals, helping to manage personal finances, helping with physical mobility and helping with housework. Not all people with disabilities require caregiving in order to further their participation and, even among those who do require assistance, the extent to which caregiving needs are met can vary greatly.

Care provided to people with disabilities can come from a variety of sources. It can be given informally, through family, friends or local community organizations and formally, through a paid caregiver. While formal caregivers are generally compensated for the assistance they provide, informal caregivers may find themselves balancing caregiving with work and other responsibilities. These competing demands and the significant costs that are often associated

with caregiving can create a considerable burden on caregivers' daily lives. The demographic of the Canadian population and their families is changing. Canadians are living longer and as we age, the chance of having a disability increase. The demographic projection presented in the 2005 *Advancing the inclusion of people with disabilities* estimate that seniors could make up to 54.3% of the population with disabilities by 2026<sup>1</sup>. The General Social Survey of 2002 indicates that almost 20% of Canadians over 45 years of age were providing informal care to one or more family members<sup>2</sup>. As the Canadian population grows older, demand for caregiving will rise. With families getting smaller and more dispersed, and the lower levels of acceptance of traditional caregiving roles, the availability of informal care may decline just as the demand for caregiving increases.

The important role of caregiving in the lives of many people with disabilities has meant that the topic of caregiving is fairly well researched. Researchers have used data from PALS 2001 and other surveys to study caregiving in Canada. For example, in *Disability in Canada: a 2001 Profile*, PALS 2001 data indicated that more than two million adult Canadians needed help with daily activities. Of these, more than 30% were not receiving all the help they needed. While still useful and informative, the research based on PALS 2001 data is becoming out-of-date. The release of PALS 2006 data provides the opportunity to update the research on caregiving with more recent data and to potentially provide a comparison of how caregiving has changed from 2001 to 2006.

PALS is an important source of data to the Government of Canada for the furthering of its understanding of disability issues. PALS is a post-censal, national survey that collects information on adults and children who have disabilities. Funded by HRSDC and conducted by Statistics Canada, PALS provides information on the prevalence of various types of disabilities, the availability and use of supports for people with disabilities and the employment profile of people with disabilities. PALS 2006 follows the groundwork laid by PALS 2001. While PALS 2001 and PALS 2006 also have slightly different content, some of the PALS 2006 data can be compared with the PALS 2001 data to identify changes over the previous five years. These comparisons would contribute to the tracking of progress in addressing the federal government's goal of maximizing the inclusion of people with disabilities in Canadian society.

In addition to its inter-year comparability, PALS is the only source of detailed, disability-specific information on many important aspects of the lives of Canadians with disabilities. More specifically, PALS 2006 data on caregiving and care receiving provides information about unmet needs, costs of caregiving and difficulties associated with obtaining and/or providing care. PALS 2001 also includes some questions on caregiving and care receiving, which allows for some comparison between the two survey cycles. The research proposed here will use PALS 2006 data to give an up-to-date portrayal of care for people with disabilities. Where feasible, the proposed research may also undertake comparisons to PALS 2001 data.

Additionally, as a post-censal survey, PALS 2006 allows for the integration of demographic information, including sociocultural information, from the 2006 Census. Accordingly, the proposed research should examine the relationship between PALS data and selected

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<sup>1</sup> Government of Canada, *Advancing the inclusion of people with disabilities: With a special section on seniors*, 2005.

<sup>2</sup> Statistics Canada, *2002 General Social Survey Cycle 16: Aging and Social Support*, 2002.

demographic variables from the Census. For example, the proposed research might examine the relationship between informal/formal caregiving and marital status/family composition, or the relationship between informal/formal caregiving and sociocultural background. It might also examine the relationship between the ageing population and informal/formal caregiving demands. Examining such relationships will produce additional useful information about people who provide and receive formal and informal care.

## **5. Research Project Requirements:**

This research project is to be divided into four main parts: (a) a review of the Canadian and international literature on caregiving and care receiving issues for adults with disabilities; (b) preparing for and conducting analyses of PALS 2006 data and Census 2006 data (and, where feasible, comparative data analyses of PALS 2006 and PALS 2001 data); (c) authorship of a synthesis paper based upon the data analyses and the literature review; and (d) presentation of research findings. The contractor will undertake the following:

### **a. Literature review:**

This literature review is to examine the existing literature and research on issues of caregiving and care receiving for adults with disabilities. It will concentrate on the Canadian case, but will also extend to international literature and research where appropriate. This review should cover a broad range of caregiving and care receiving issues for a wide population of adults with disabilities. An important consideration of this research will be to examine differences among a variety of groups of adults, in terms of their experiences with caregiving and care receiving issues. For example, certain characteristics (including type of disability, severity of disability and sociocultural background) might be found to be correlated with differences in caregiving and care receiving experiences. Accordingly, this review should include literature and research on ageing population, changing family structure and the effects on formal and informal caregiving that has been conducted on the selected characteristics used for analyses. In addition, this review should explore barriers to access to caregiving, and potential issues which may arise for people who provide care to people with disabilities.

The review should be written as a thematic review approximately 15-20 pages in length and accompanied by a 2-3 page summary of the emerging themes (noting the references that pertain to each theme).

### **b. Data analysis:**

The contractor will complete data analyses examining caregiving and care receiving issues for Canadian adults with disabilities using PALS 2006 data and Census 2006 data, and where feasible PALS 2001 data.

- (A) *Conducting statistical data analyses:* The contractor will conduct univariate, bivariate and/or multivariate data analyses on PALS 2006, PALS 2001 and Census data, as appropriate. The contractor must specify and justify the method of analysis chosen in their proposal.

(B) *PALS sampling*: PALS data is collected and disseminated by Statistics Canada and is therefore reliable in its sampling methods.<sup>3</sup> The 2006 sampling methods differed slightly from those of 2001. The major difference involves a change in coverage resulting from the 2006 inclusion of a number of aboriginal communities, the addition of the three territories, and the modification to the definition of collective dwellings. Therefore, it is crucial for the contractor to be aware that sample adjustments will need to be made before a comparison between the two surveys is possible.

(C) *Census*: As a post-censal survey, PALS data can be directly linked to the 2006 census. The Census is conducted every five years and is disseminated by Statistics Canada. Where relevant, the researcher will use this data when conducting statistical analysis.

### c. **Synthesis paper:**

The contractor will prepare a synthesis paper approximately 35-45 pages in length. This paper will be based on the literature review and data analyses. This paper must not be simply a summary or description of the data. The synthesis paper must be written within a thematic framework and use the literature and data as evidence. This synthesis paper should involve the identification of a wider array of caregiving and care receiving issues than has been previously identified and should, when feasible, address the changes, since 2001, in the state of caregiving and receiving for people with disabilities. This paper should also extend the analysis to a range of disability types and severity. Ultimately, this synthesis paper should provide a discussion of future knowledge/research requirements—what aspects of caregiving and care receiving issues among adults with disabilities in Canada are poorly understood, how might we go about producing future research to learn more about them, and what key factors do we need to better understand in order to support future policy and program development?

More specifically, the following research questions should be addressed:

- What are the key characteristics of adults receiving caregiving in Canada? Who receives formal versus informal care?
- What are the key socioeconomic characteristics of those people providing informal and formal caregiving in Canada? (For example: What is their relationship with the people they are providing care to? How does the role of a caregiver affect other aspects of their work or personal lives?)
- What is the nature of the care being provided? (For example: How frequent is it? How does it vary by type and severity of disability? Are needs for care going unmet?)

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<sup>3</sup> For more information on PALS sampling methods, refer to Participation and Activity Limitation Survey 2006: Technical and methodological report ([89-628-X2007001](#))

- Are there examples of existing gaps/shortcomings in supports and services to people who need care? How do these vary by disability type, severity of the disability, and other personal circumstances (such as gender, income, age groups, etc.)?
- What future research is needed to support the development of policies and programs that might address identified gaps in caregiving-related supports and services? What future research is needed to support the development of larger models for facilitating the caregiving of adults with disabilities?

**d. Presentation of preliminary research:**

The contractor is to prepare and deliver a PowerPoint presentation of key research findings at an approved conference or equivalent event, no later than March 31, 2010. The presentation should include a thematic discussion of the literature, an explanation of the methods, and a discussion on the initial findings of the data analysis. The presentation should include 17 – 25 slides and be approximately 20 minutes in length.

**6. Budget:**

The cost of the project shall not exceed the available budget of \$45,957 (including GST, any RDC access fees and any travel and accommodation expenses related to the presentation.

An amount of \$3957.00 will be paid to the contractor to cover the costs of accessing data at a Statistics Canada Research Data Centre (RDC).

An amount of up to \$2,000 (including GST) will be available for any travel and accommodation expenses related to the final presentation deliverable as per Federal Government (Treasury Board) guidelines.

[http://www.tbs-sct.gc.ca/pubs\\_pol/hrpubs/TBM\\_113/menu-travel-voyage\\_e.asp](http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/TBM_113/menu-travel-voyage_e.asp)

**7. Schedule of Deliverables and Payments :**

In undertaking the project, the contractor must produce the following deliverables:

Date	Event/Deliverable	Percent of total contract*
Upon signing	<ul style="list-style-type: none"> <li>• <b>Initial (in-person or telephone) meeting with the Project Authority</b></li> </ul>	
May 4, 2009	<ul style="list-style-type: none"> <li>• <b>Preliminary draft of literature review</b></li> <li>• <b>Proposed data analysis schedule and methodology</b></li> </ul>	5%

August 31, 2009	<ul style="list-style-type: none"> <li>• <b>Completed comparative data analysis</b></li> <li>• <b>Completed literature review</b></li> </ul>	15%
November 2, 2009	<ul style="list-style-type: none"> <li>• <b>Completion of penultimate draft of synthesis paper according to guidelines</b></li> </ul>	20%
January 15, 2010	<ul style="list-style-type: none"> <li>• <b>Completion of final synthesis paper with revisions based on peer review according to guidelines</b></li> </ul>	50%
No later than March, 2010	<ul style="list-style-type: none"> <li>• <b>Power Point presentation at a conference or equivalent event (no later than March 31, 2010)</b></li> </ul>	10%

\* i.e. total of professional service fees in contract

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

## 8. Contract Terms and Conditions:

**Copyright & Intellectual Property:** Intellectual property will remain with the contractor, but no publication based upon this work should be released without notifying HRSDC prior to its release. HRSDC requests the contractor allow HRSDC to publish the document on the internet as part of a series of papers commissioned through HRSDC.

**Language Requirements:** The report should be produced in English or French.

**Work Environment:** HRSDC will **not** provide an office for the completion of this contract.

**Contractor's Role:** The contractor will commence work upon signature of the contract and must complete all deliverables by March 31, 2010. The contractor's role is to perform according to the project requirements and detailed description of work and deliver the acceptable deliverables to the project authority by the specified dates outlined as per the schedule of events.

If a member of the team (including a sub-contractor) is replaced after the contract is signed, the contractor must advise the contract authority immediately in writing and provide the name and CV of the proposed replacement to justify their competence. Failing to do so may result in the termination of the contract.

**Other:** HRSDC reserves the right to withdraw or amend the terms of this RFP at any time.

## 9. Communications:

Prospective bidders may direct questions about this RFP to the contract authority. Any questions must be posed in writing, and all questions and answers will be shared with all known prospective bidders.

## **10. Proposal Requirements:**

Proposals considered for contract award will:

- Provide a succinct project description and contextualize the proposed research;
- Present the conceptual/analytical framework or theory to be used in the research (in particular, the bidder should demonstrate a clear understanding of the range of interaction issues to be investigated for a wide range of adults with disabilities who need care and propose an analytical framework for dealing with them);
- Include a description of the research methods to be utilized. This should include a framework outlining the bidder's methods for selecting appropriate literature for the review. This should also include a detailed description of the methodological steps proposed for the data analyses. The bidder should demonstrate a knowledge of and experience with quantitative research methods.
- Provide a detailed statement of the work planned for carrying out this project, including the identification of specific outputs and a schedule for their completion.
- Submit a detailed statement of their estimated costs associated with the proposed work, including professional fees and other incidentals.
- Provide CVs for all members of the research team along with the estimated time to be spent by specific staff on each component of the paper. These activities should be appropriate to the requirements of this RFP.
- Provide details concerning past experience with conducting quantitative analyses and research involving people with disabilities. Bidders should also include details regarding any research they have conducted involving persons with disabilities and/or on caregiving
- Provide samples of at least three documents completed within the past ten years which clearly demonstrate the bidders' ability to write a synthesis paper based upon research that they have conducted. The bidders may provide web-site addresses, machine readable files or hard copies of these documents.

## **11. Selection Criteria:**

### **a) Mandatory requirements**

M-1 The principal analyst(s) must have a minimum of 2 years experience in the area of disability-related research and/or caregiving research.

M-2 The principal analyst(s) must have a minimum of 2 years team experience with quantitative research methods.

M-3 The proposed budget shall not exceed budget constraints.

M-4 The Bidder's proposed personnel, including subcontractors, who require access to PROTECTED information, assets or work site(s) must **be a citizen of Canada** and each hold a valid **RELIABILITY STATUS** at the level of **PROTECTED B** granted and approved by Canadian and International Industrial Security Division (CIISD), Public Works and Government Services Canada **at time of contract award**.

## b) Rated requirements

Proposals will be assessed and awarded points to a maximum of 100 for the technical merit of the proposal and the contractor qualifications. The relative importance of certain criteria is reflected in the selection matrix in Appendix A.

Proposals will also be assessed on their proposed price.

### Basis of Selection:

- A minimum score of seventy (70) percent is required in each rated criteria of the technical sections and the contractor qualifications sections of the proposal ratings. Proposals that do not meet the minimum 70 percent in each rated criteria will not be considered for contract award. **See Appendix A for the Rated Requirements (technical and contractor qualifications sections).**
- The compliant bidder with the highest combined rating of technical merit (combination of technical sections and contractor qualifications sections) (weighted at 80%) and price (weighted at 20%) shall be selected as the preferred researcher(s) to implement the project. See the table below for the methodology to be applied to obtain final ratings.

Example of Best Value Determination			
	Bidder 1	Bidder 2	Bidder 3
Technical Merit Points	91	88	80
Price Quoted	\$50,000	\$40,000	\$47,000

<b>CALCULATION</b>			
	<b>Technical Points</b>	<b>Rated Price Points</b>	<b>Total Points</b>
Bidder 1	$\frac{91}{* 91} \times 80 = 80.00$	$\frac{**40}{50} \times 20 = 16.00$	96.00
Bidder 2	$\frac{88}{* 91} \times 80 = 77.36$	$\frac{**40}{40} \times 20 = 20.00$	97.36
Bidder 3	$\frac{80}{* 91} \times 80 = 70.32$	$\frac{**40}{47} \times 20 = 17.02$	87.34
* Represents the highest technical score ** Represents the lowest priced proposal			

**Assumption:** Three valid bids have been received. The maximum technical score that can be obtained is 100 points. The highest technical score and lowest price proposal received ‘full rated’ percentage and other proposals are pro-rated accordingly.

The winner is the bidder scoring the highest total points established by adding the technical points and the rated price points. Based on the above calculation, a contract would be awarded to Bidder 2, who attained the highest total score taking into consideration the technical merit and proposed price.

- Final awards will be decided by HRSDC upon completion of the review process. All bidders will be informed of the decision.

**Appendix A  
Selection Criteria Points**

<b>Criteria</b>	<b>Total Points</b>	<b>Min. Pts Awarded</b>
<b>TECHNICAL SECTION</b>		
<p><b>Demonstrated Understanding of Project Requirements &amp; Objectives</b></p> <ul style="list-style-type: none"> <li>The bidders should demonstrate their understanding of the project requirements and objectives while situating the proposal within existing research and literature on the topic. (maximum 10 points)</li> </ul>		7
<p><b>References Illustrative of Research Review</b></p> <ul style="list-style-type: none"> <li>Proposals will be rated on their use of illustrative references in the proposal. Bidders are encouraged to reference all material used to assist in writing the proposal and may choose to add additional titles that will be referenced in the synthesis paper but have not been used for writing the proposal. (maximum 10 points)</li> </ul>		7
<p><b>Completeness &amp; Clarity of the Work Plan</b></p> <ul style="list-style-type: none"> <li>Evaluation of the proposal will be based on whether all project requirements outlined in the RFP have been addressed in the work plan and the overall clarity with which they have been addressed. Points will be awarded for well organized and clearly presented proposals. (maximum 10 points)</li> </ul>		7
<p><b>Proposed Methodological Approach</b></p> <ul style="list-style-type: none"> <li>Bidders should thoroughly describe the methodological approaches to be used in the research and provide an understanding of how such approaches will meet the project objectives. Bidders should elaborate on the steps to be followed within the process of conducting this research. This should include a framework outlining the bidder's methods for selecting appropriate literature for the review. This should also include a detailed description of the methodological steps proposed for the statistical data analysis (for example: securing access to PALS 2006 data and Census 2006 data). (maximum 15 points)</li> </ul>		10.5
<p><b>Level of Effort &amp; Schedule for Deliverables</b></p> <ul style="list-style-type: none"> <li>Proposals will be evaluated on the level of work allocated to each individual project member and on the schedule for completion of all major deliverables. Proposals should provide sufficient detail to assist the evaluators in determining how the tasks and activities necessary to achieve the project objectives will be carried out. The plan should outline the dates scheduled for completion of all major components of the project and the level of work to be dedicated by each project member to each deliverable (literature review, draft report, final report, PowerPoint presentation, etc.). (maximum 5 points)</li> </ul>		3.5
<b>TOTAL TECHNICAL SECTION</b>	50	35

<b>CONTRACTOR QUALIFICATIONS SECTION</b>		
<p><b>Relevant Research Experience</b>            Bidders should provide evidence of expertise in the gathering, analysis &amp; synthesis of information particularly as it pertains to the subject area. A Curriculum Vitae and relevant experience for each research team member, including staff members and/or sub-contractors, who will be participating in the project should be included with the proposal. Assessment will be based on the quality of previous work completed when conducting similar types of projects over the last 10 years. Bidders must demonstrate skill, knowledge, and expertise with and expertise in conducting research in the area of people with disabilities and/or caregiving research. (maximum 25 points)</p>		17.5
<p><b>Relevant Writing Experience</b>            Bidders should provide details of relevant experience and competencies that clearly demonstrate the bidder's experience in conducting, analyzing, and writing up research of this type. Bidders should be able to provide at least 3 documents completed within the past 10 years (with at least 2 documents being completed within the last 5 years) which clearly demonstrate these capacities. The documents should provide a clear indication of the bidder's ability to write a synthesis paper based upon quantitative research they have conducted. The bidder may provide web-site addresses; machine-readable files or hard copies of these documents. Bidders will be rated on the quality of the body of work completed in satisfying goals similar to that of this project as well as their relevance/aptness to the task at hand. (maximum 25 points)</p>		17.5
<b>TOTAL CONTRACTOR QUALIFICATIONS SECTION</b>		35
Total Technical Merit		70

**TECHNICAL SECTION**

**a) Demonstrated Understanding of Project Requirements & Objectives:**

(maximum 10 points)

- Not addressed (0 pts)
- Fair (up to 5 pts)
- Good (up to 7 pts)
- Very good (up to 8.5 pts)
- Excellent (up to 10 pts)

**Subjective Rating Criteria for Requirement**

- **Not addressed**: Information is missing.
- **Fair**: Basic understanding of project requirements and objectives. Some information presented contains a significant error (i.e. inaccurate, outdated and/or irrelevant).
- **Good**: Satisfactory understanding of project requirements and objectives. The majority of the information is accurate and current and only a small amount of information contains an error. Almost all of the information provided is relevant.
- **Very**: A good understanding of the project requirements and objectives is demonstrated. All of the information is accurate and current and contains no significant errors. A small amount of irrelevant information is included in the proposal.

- **Excellent:** Sophisticated, knowledgeable and insightful understanding of project requirements and objectives. All information presented is accurate, current and relevant.

**b) References Illustrative of Research Review:**

**(maximum 15 points)**

Not addressed	(0 pts)
Fair	(up to 5 pts)
Good	(up to 7 pts)
Very good	(up to 8.5 pts)
Excellent	(up to 10 pts)

**Subjective Rating Criteria for Requirement**

- Points will be awarded based on the breadths, depth and relevance of reference material provided, up to a maximum of 15 points. Bibliographic references must be related to the subject area in order to be awarded credit.

**c) Completeness and Clarity of the Project Plan:**

**(maximum 10 points)**

Not addressed	(0 pts)
Fair	(up to 5 pts)
Good	(up to 7 pts)
Very Good	(up to 8.5 pts)
Excellent	(up to 10 pts)

**Subjective Rating Criteria for Completeness**

- **Not addressed:** Information is missing.
- **Fair:** Limited understanding of analysis required. Some information presented contains a significant error (i.e. inaccurate, outdated and/or irrelevant).
- **Good:** Satisfactory understanding of analysis required for each research questions. None of the information presented contains a significant error (i.e. inaccurate, outdated and/or irrelevant).
- **Very Good:** Comprehensive understanding of analysis demands demonstrated for each research question. The majority of information is accurate and current, and does not contain significant errors.
- **Excellent:** Sophisticated understanding of analysis required for each research question. The plan provides a thorough and in depth description of how to meet the objectives. All information presented is accurate, current and relevant.

**d) Proposed Methodological Approach:**

**(maximum 15 points):**

Not addressed	(0 pts)
Fair	(up to 6 pts)
Good	(up to 9 pts)
Very Good	(up to 12 pts)

Excellent

(up to 15 pts)

**Subjective Rating Criteria for Proposed Methodological Approach:**

- **Not addressed**: No information on the methodological approach to be used is provided in the proposal.
- **Fair**: Proposed methods are significantly lacking in its description. Multiple major questions remain around the methods. The proposal lacks details around important steps in the process.
- **Good**: The description of the methods is adequate; however, at least two significant questions remain around the methods to be employed.
- **Very Good**: The description of the methods is good; however, there may be some details regarding some important steps in the process that are missing or weak and/or there may be a number of small questions remaining around the methods to be employed.
- **Excellent**: The description of the methods is clearly articulated with all important steps being addressed with significant detail.

**e) Level of Effort & Schedule for Deliverables:**

(maximum 5 points):

Not addressed	(0 pts)
Fair	(up to 2 pts)
Good	(up to 3 pts)
Very Good	(up to 4 pts)
Excellent	(up to 5 pts)

**Subjective Rating Criteria for Level of Effort & Schedule for Deliverables:**

- **Not addressed**: No information on level of effort and/or deliverable dates provided in the proposal.
- **Fair**: The level of effort outline is unrealistic for project completion. More than one major deliverable is missing from the plan or the timeframe allotted for completion of deliverables is unrealistic.
- **Good**: A satisfactory level of effort is allocated for project completion. Either one major deliverable is missing from the plan or allotted a somewhat unrealistic amount of time.
- **Very Good**: A realistic and reliable level of effort is allocated to each section of the project. No major deliverables are missing from the plan.
- **Excellent**: The level of effort allocated to project completion exceeds expectations. No deliverables are missing from the plan. Time and resources allocated to each section of the project are realistic. Either additional minor milestones may have been included in the plan and/or there is some allowance built into the schedule and work plan for possible difficulties that may arise during data analyses.

**CONTRACTOR QUALIFICATIONS SECTION**

**a) Relevant Research Experience:**

(maximum 25 points)

Relevant experience and proven capability as evidenced by similar and/or related work performed by the contractor. Assessment is based on the quality of examples provided.

Not addressed	(0 pts)
Fair	(up to 8.5 pts)
Good	(up to 14.5 pts)
Very Good	(up to 20.5 pts)
Excellent	(up to 25 pts)

### **Subjective Rating Criteria for Research Experience**

- **Not addressed**: Information is missing.
- **Fair**: Body of research is mostly irrelevant or unrelated to the topic.
- **Good**: Body of research is important and has a few irrelevant or unrelated pieces.
- **Very Good**: Body of research is important and has no irrelevant or unrelated pieces of work but most work is indirectly related to research topic.
- **Excellent**: Body of research is extensive and has no irrelevant or unrelated pieces of work and most work is directly relevant to research project.

### **b) Relevant Writing Experience:**

**(maximum 25 points)**

Not addressed	(0 pts)
Fair	(up to 8.5 pts)
Good	(up to 14.5 pts)
Very Good	(up to 20.5 pts)
Excellent	(up to 25 pts)

### **Subjective Rating Criteria for Writing Experience**

- **Not addressed**: No information on experience writing research papers and synthesizing quantitative research projects is provided in the proposal.
- **Fair**: Examples provided demonstrate little quality experience in writing research papers in the areas of people with disabilities or rural/urban issues
- **Good**: Examples provided demonstrate some quality experience in writing research papers in the areas of people with disabilities or rural/urban issues. Examples demonstrate a good ability to write final research papers.
- **Very Good**: Examples provided demonstrate good quality experience in writing research papers in areas of people with disabilities or rural/urban issues for various audiences. Examples provided demonstrate good ability to write research papers based upon quantitative research.
- **Excellent**: Examples provided demonstrate significant quality experience writing research papers in the areas of people with disabilities or rural/urban issues for various audiences and demonstrate excellent ability to write research papers based upon quantitative research.

## **Appendix B Presentation of Research Findings**

The final report must be provided in the following formats:

- Two electronic versions of the report - one in MS Word and one in Adobe portable document format (pdf), including the source files of all electronic images, e.g. graphs, photographs, tables and images, included in the document (minimum 4X5, 300 dpi);
- a .pdf file of the completed document, and;
- a .doc source file for the text source files for all graphics.

The final report must include:

- An abstract (of no more than 200 words outlining the most significant information contained in the report);
- An executive summary (1-5 pages in length describing the purpose and scope of the document, research methods and data sources, results, conclusions and key research gaps);
- A table of contents;
- A list of figures;
- A list of tables, and;
- A bibliography, proper citations, and explanatory footnotes if required.
- The final report is to be of between 35 and 45 pages in length.

The author must also provide with the final report:

- Ten subject keywords for registering the publication with internet search engines. Without these keywords, the document will not be found on the HRSDC website. The keywords must be found in the Government of Canada Core Subject Thesaurus. The Thesaurus can be found on the Internet at:  
[http://en.thesaurus.gc.ca/these/thes\\_e.html](http://en.thesaurus.gc.ca/these/thes_e.html);
- A two-sentence description of the paper for use as an Internet summary, and;
- A short paragraph of Key Findings.

**In order to avoid the necessity for extensive changes, the contractor should follow the style guidelines provided when preparing the report, abstract and executive summary.**

*The Canadian Style*, published by Dundurn Press Ltd. in cooperation with Public Works and Government Services Canada Translation Bureau, can also be helpful in matters of punctuation, capitalization, and usage. *The Gage Canadian Dictionary* is the official standard for federal government spelling, but any reputable Canadian dictionary may be used as a reference. In matters of spelling, capitalization, and graphics, consistency is key.

Contractors will receive a manual entitled “*Publication Guidelines for Research Contractors*”. This manual offers a step-by-step guide to the preparation of all reports that will be published by the Department of Human Resources and Skills Development Canada (HRSDC). Its aim is to ensure that all essential information is included and to promote uniformity of format. Contractors are advised to follow the format described in this manual and to adhere to the report requirements stipulated in the contract.