



**Workers' Compensation Board of British Columbia**

**Corporate and Health Care Purchasing**

***Request for Information & Qualification (RFIQ)***

**Retirement Planning Workshop Services**

**RFIQ #028-2009**

**Issue Date: July 30, 2009**

WorkSafeBC is seeking submissions of interest and qualifications from service agencies to provide retirement planning workshops.

**WorkSafeBC requests that responses be submitted by:**

**2:00 PM Pacific Time on August 20, 2009**

**Delivery Instructions:**

<b>Mail / Courier / By Hand:</b>
<b>Worker and Employer Services – Main Entrance/Security Desk WorkSafeBC 6951 Westminster Highway Richmond, BC V7C 1C6 Attn: Corporate and Health Care Purchasing</b>
<b>Electronically</b>
Electronic copies of the RFIQ may be submitted in accordance with the BC Bid instructions for e-bidding. Only pre-authorized e-bidders registered on the BC Bid system will be able to submit electronic bids.
<b>Email &amp; Fax responses will NOT be accepted.</b>

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<b>SECTION I - INSTRUCTION TO RESPONDENTS</b>
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<b>1.0 INTRODUCTION</b>
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**Workers' Compensation Board of BC herein referred to as "WorkSafeBC".**

- 1.1 This RFIQ is an inquiry and Request for Information & Qualification only and does not imply a commitment by WorkSafeBC to proceed with the work or to purchase any product(s) and/or solution(s). WorkSafeBC will advise **only** the Respondent(s) it decides to proceed with further, as defined herein.
- 1.2 Until such time as a contract is awarded, WorkSafeBC reserves the right in its sole discretion not to proceed with the work, or purchase any product(s) or solution(s), to proceed by way of a Request for Proposal (RFP), to issue one or more further requests for information by a Request for Information (RFI), Request for Information & Qualification (RFIQ) or Request for Additional Information (RAFI) or otherwise, or to negotiate a contract individually with any Respondent to this RFIQ for all or part of the work, product(s), or solution(s).
- 1.3 WorkSafeBC reserves the right to conclude any or all of the processes relating to this requirement should it be in the best interest of WorkSafeBC as determined by WorkSafeBC. WorkSafeBC is not bound to enter into a contract with any qualified Respondent.
- 1.4 If WorkSafeBC elects to proceed by way of an RFP, or if WorkSafeBC elects to request more information by way of a further RFI, RFIQ, or RAFAI or by any other method, WorkSafeBC may in its sole discretion create a Respondent list using any or all Respondents to this RFIQ; may rank responses based on the evaluation and/or requirements defined herein and select a shortlist of one or more of those which ranked most highly; or if deemed in WorkSafeBC's best interest, it may include additional Respondents.
- 1.5 This RFIQ should not be considered a request for or an authorization to perform any work or to supply any goods or services. Any development work undertaken by the Respondent and any costs and/or expenses involved in the preparation of replying to this RFIQ, and for subsequent presentations and/or demonstrations and/or negotiations will be the sole responsibility of the Respondent, including any travel.
- 1.6 WorkSafeBC is subject to the *Freedom of Information and Protection of Privacy Act (FIPPA)* and as such all submissions to this RFIQ will become the property of WorkSafeBC and as such will be held in confidence by WorkSafeBC subject to the FIPPA disclosure provisions. Any clauses in a document received in response to this procurement process which purports to limit WorkSafeBC's obligations under FIPPA will be considered void and severable from the response. By answering this RFIQ the Respondent will be deemed to have accepted this term.
- 1.7 WorkSafeBC reserves the right to modify this RFIQ at any time and at its sole discretion. This includes the right to cancel this RFIQ at any time without entering into a contract with any Respondent.

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<b>2.0 RFIQ SUBMISSION AND DELIVERY INSTRUCTIONS</b>
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- 2.1 It is the Respondents' responsibility to ensure that they have received a complete set of documents as listed by the page numbers. By submitting a Response, the Respondent has verified that they have received a complete set of RFIQ documents including any and all addenda.
- 2.2 WorkSafeBC requests that Respondents complete and return all the following by **2:00 PM Pacific Time on August 20, 2009:**
- **Signed WorkSafeBC RFIQ Response Form contained in Section IV of this RFIQ**
  - **RFIQ Response**
  - **Any appendixes and information requested including;**
    - **Appendix A References**
- 2.3 WorkSafeBC requests that responses be delivered by **one** of the following methods:

*Hardcopies:*

- **One (1) original plus two (2) copies of the response in hardcopy, and one (1) copy on CD**
- Please ensure responses are delivered in an envelope identified with the name and address of the Respondent, **addressed to WorkSafeBC, Attn: Corporate and Health Care Purchasing**; with the **RFIQ number and closing date** clearly identified on the outside of the package to the following address:

**Worker and Employer Services – Main Entrance/Security Desk  
WorkSafeBC  
6951 Westminster Highway  
Richmond, BC V7C 1C6  
Attn: Corporate and Health Care Purchasing**

*Electronically through BC Bid:*

- a. An electronic copy of the response will only be accepted in MS Word or Adobe PDF format, Microsoft Office 2003 or earlier.
  - b. 6 MB maximum file size.
  - c. Please ensure that the entire proposal is submitted as a single file, except for the RFIQ Response Form which requires a signature, digital signatures are acceptable.
  - d. ZIP or like files will not be accepted.
  - e. WorkSafeBC will NOT accept any responsibility for failure to receive or the inability to read any submission for any reason including technical issues, data corruption, failure as a result of BC Bid security system, or failure for any other reason.
- 2.4 **Email & Fax responses will NOT be accepted.**

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<b>3.0 REQUESTS FOR ELECTRONIC COPY OF RFIQ</b>
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- 3.1 It is the responsibility of the Respondents who retrieve or download this RFIQ document from the BC Bid website ([www.bcbid.gov.bc.ca](http://www.bcbid.gov.bc.ca)), or the WorkSafeBC website ([www.worksafebc.com](http://www.worksafebc.com)) to ensure they monitor this site for any addendum to the RFIQ document issued up to and including the closing date.
  
- 3.2 For requests of electronic copies of this Request for Information & Qualification, please contact Jason Lin at 604-276-3344 and provide the appropriate RFIQ number, your name, phone number and email address.
  
- 3.3 Respondents who have obtained the RFIQ electronically shall not alter any portion of the document, with the exception of adding the information requested.

<b>4.0 CLARIFICATION</b>
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- 4.1 Please direct any question related to the RFIQ to the Purchasing Officer whose name appears below. Respondents shall not ask questions of the WorkSafeBC department for which the contract is being procured or any other department of WorkSafeBC, unless so directed elsewhere in this document.

<b>RFIQ INQUIRIES:</b>	<b>Cathie Herbert, Senior Purchasing Officer</b> Corporate and Health Care Purchasing Phone #: (604) 214-7413 Fax #: (604) 276-3260 Email: <a href="mailto:purchase@worksafebc.com">purchase@worksafebc.com</a>
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- 4.2 Respondents are asked to submit in writing any questions regarding this RFIQ to the attention of WorkSafeBC not less than three (3) working days before RFIQ Response closing date.
  
- 4.3 The questions will be reviewed, and where information sought is not already clearly indicated, WorkSafeBC shall issue an addendum to all Respondents which shall become part of the RFIQ documents.
  
- 4.4 Other than a member of the Corporate and Health Care Purchasing, no employee or agent of WorkSafeBC is authorized to change the content of this RFIQ and/or any addenda.

<b>5.0 GOVERNING LAW / JURISDICTION</b>
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- 5.1 This Request for Information & Qualification shall be governed by and construed in accordance with the laws of the Province of British Columbia which shall be deemed to be the proper law hereof and in so doing the Courts of British Columbia shall have exclusive jurisdiction to determine all disputes and claims arising out of or in any way connected with this RFIQ.

<b>6.0    AGREEMENT FOR INTERNAL TRADE</b>
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- 6.1    If the value of any response(s) resulting from this Request for Information & Qualification exceeds the cost thresholds stipulated in Annex 502 of the Agreement on Internal Trade then all provisions of Annex 502 of the Agreement on Internal Trade will apply.
  
- 6.2    The language used in all responses to this Request for Information & Qualification shall be English.

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<b>SECTION II – BUSINESS OBJECTIVES</b>
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<b>1.0 PURPOSE</b>
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- 1.1 WorkSafeBC is seeking submissions of interest and qualifications from service agencies to provide retirement planning workshops throughout the year that will prepare our employees for retirement in 2 to 3 years. The period of contract is for two years, with the option to renew for an additional third, and fourth year.
- 1.2 The overall objective is to have a service agency organize, coordinate and deliver approximately three (3) to four (4) retirement planning workshops each year that will meet the needs of our employees who are anticipating retirement. WorkSafeBC reserves the right to increase or decrease the number of workshops per year at its discretion.
- 1.3 The service agency is to organize, coordinate and facilitate the workshop which will include arranging for the speakers; booking the facilities/equipment/lunch and refreshments for the workshops; managing the payment of fees for service or honorarium; providing handouts/speakers notes; gathering and providing a program evaluation/feedback for potential changes.
- 1.4 Topics covered are to include, at a minimum, but not limited to, information on transition to and what to expect at retirement (e.g. financial, psychological, emotional, social), legal considerations (e.g. wills, estate planning, power of attorney), and current government sponsored benefits (e.g. Canada Pension Plan, Old Age Security, Employment Insurance). Being able to relate to, understand the nuances of, and customize the topic information accordingly to someone residing and retiring in British Columbia is required.
- 1.5 The service agency is to provide a detailed agenda/itinerary with the duration for each topic and/or subtopic and the name of the presenter, at a minimum of one month prior to the scheduled workshop date(s).
- 1.6 This RFIQ is intended to solicit information and qualification only, WorkSafeBC reserves the right to proceed to additional phases as outlined in Section II 2.1.
- 1.7 All respondents must understand their obligation under the Freedom of Information and Protection of Privacy Act. No work will be permitted to be done outside of Canada.

<b>2.0 PROCESS</b>
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- 2.1 Based on the responses received for the RFIQ, WorkSafeBC may:
  - Decide not to proceed with the project, work, product or solution;
  - Decide to defer the project, work, product or solution;
  - Request further information using an Request For Information (RFI) or Request For Additional Information (RFAI);
  - Develop and issue a formal Request for Proposal (RFP); or

- Shortlist one (1) or several Respondents to formally present their proposed solution and/or approaches to the WorkSafeBC Selection Committee, or negotiate a contract directly with a Respondent.
- 2.2 WorkSafeBC reserves all rights defined herein Section I, Instructions to Respondents, “1.0 Introduction”, as deemed in the best interest of WorkSafeBC.
- 2.3 If WorkSafeBC requests presentations, short-listed Respondent(s) will be notified after the RFIQ closing of the specific time, date and location for a presentation of their submission. All costs incurred in the preparation of the responses and the presentation, including all travel costs, are the responsibility of the Respondent and are not chargeable to WorkSafeBC. WorkSafeBC will try to accommodate the availability of all Respondent(s). However, WorkSafeBC reserves the right not to continue with Respondent(s) who are not available for a presentation.

### **3.0 BUSINESS REQUIREMENTS**

#### **3.1 Workshop Format**

The current workshop is a 2 day event, although WorkSafeBC is exploring options on the timing of various topics to be presented, thus the workshop may be reduced to 1 day or remain 2 days in some or all cases. WorkSafeBC reserves the right to have flexibility to add, delete or edit topic content.

#### **3.2 Facilitator**

The service provider will designate and maintain an Account Rep/manager and Facilitator; of which there will be no changes without prior notification of WorkSafeBC. Ideally, the Facilitator has either experienced the retirement transition firsthand or has proven experience in helping others through the transition. It is important that the workshop Facilitator relates to, understands the nuances of, and customizes the topic information accordingly to, someone residing in British Columbia.

#### **3.3 Speakers**

The service agency is to provide all qualified speakers with expertise in the presented topic. Speakers must have experience in addressing subject matter to a varied array of audience, from a lower pay group to senior management. The successful Respondent may retain a list of speakers, approved by WorkSafeBC, to call upon for workshops.

#### **3.4 Facilities**

The workshop(s) are to take place in Richmond, B.C. and in close proximity (less than one kilometer) to WorkSafeBC’s Richmond head office. The workshop venue is to be within walking distance of a Hotel, for employees attending from outside of Metro Vancouver. The successful Respondent will manage all aspects of the facilities and equipment rental as well as food and refreshments. Prior to each workshop, WBC will approve:

- Speakers
- Agenda
- Venue selection and cost
- Equipment rental and cost
- Catering menu and cost

The successful Respondent would book and pay for the following, and then bill WorkSafeBC for reimbursement:

- Facilitator
- Speakers
- Venue, equipment ,catering
- Speaker fees or honorarium
- Handouts and speaker notes
- Gathering and summarizing program evaluation.

#### **4.0 FEE SCHEDULE**

To determine the best strategy and for the purpose of this RFIQ, WorkSafeBC is requesting budgetary costs for the following areas:

1. Fees for facilitator/speakers
2. Facilities and equipment rental
3. Other Costs

#### **5.0 EVALUATION**

5.1 Evaluation and short-listing of Respondents shall be based on WorkSafeBC's evaluation of the responses using criteria that include, but are not limited to:

Company Profile	5%
Capabilities and Expertise	35%
Approach and Methodology	25%
Innovation and Value Add	10%
Cost	25%
<b>Total:</b>	<b>100%</b>

- 5.2 WorkSafeBC may invite Respondent(s) to make a presentation to WorkSafeBC. At the discretion of WorkSafeBC, the evaluation for the second phase, if required will only be given to the shortlist respondents.

WorkSafeBC may shortlist one (1) or more Respondents who score the highest in the evaluation to conduct a formal interview and evaluation of their proposal. WorkSafeBC may request that these Respondent(s) bring to the interview samples of print projects and materials as specified by WorkSafeBC as well as the proposed Facilitator to discuss his or her role. The shortlisted Respondents will then be scored for an additional 10% which will become part of the over all evaluation for a total of 110%.

- 5.3 If WorkSafeBC requests presentation(s), the Respondent will be responsible to ensure that staff attending the presentation are able to respond to detailed business and/or technical questions.
- 5.4 Any awarding of a contract will be subject to satisfactory reference checks and protection of privacy assessment, in the sole opinion of WorkSafeBC.
- 5.5 Respondents that score highly in the initial evaluation process will be assessed to determine their ability to comply with the Protection of Information and Personal Privacy. WorkSafeBC reserves the right not to award a contract to Respondents that score unsatisfactory on Appendix B, Protection of Privacy Assessment.

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## SECTION III - RESPONSE FORMAT

Respondents are invited to be creative and address any other approaches and other deliverables that may achieve the goals. WorkSafeBC requests that you include the following minimum information in your response.

- Please enclose the **signed Section IV RFIQ Response Form ON TOP of your submission package.**
- Please provide your response in the same sequence of topics as listed below see 1.0 to 5.0
- Please provide a Table of Contents for your submission.

### 1.0 COMPANY PROFILE

1.1 Please include the following: (Maximum 2 pages).

- Letter of introduction with an overview of your company background and profile.
  - How long you have been in business.
  - What is your core business.
- a. Complete Appendix B –Protection of Privacy Assessment.

### 2.0 CAPABILITY AND EXPERIENCE

2.1 **Capability and Experience – please respond to each question, use Section II for reference:**

- a. Describe your experience in delivering Retirement Planning Workshops (1/2 page maximum)
- b. Provide two references from similar organizations to WorkSafeBC, to whom you delivered similar workshops. Provide firm name, location and contact information.
- c. Indicate if you are able to deliver 3 to 4 workshops each year? Indicate the maximum workshops you'd be capable of delivering?
- d. Indicate if you are able to deliver these workshops in the spring and fall time frame. Indicate any time of the year in which you would not be able to provide service.
- e. Provide the number of people currently employed with your company. Indicate how many are direct employees; how many are currently working for you as contractors and how many contractors you currently have in your data base.
- f. Provide name, credentials and resume with at least two references, for your Account Rep/Mgr and Facilitator, if roles are combined into one person. If roles are split, provide information for each person. For the designated Facilitator, please also mention their knowledge and familiarity with any topics you feel may be specifically relevant to someone from British Columbia.
- g. Provide name, credentials and resume proving relevance and expertise in the subject matter described herein, with at least two references, for your Speaker(s).

**3.0 APPROACH AND METHODOLOGY**

- 3.1 Briefly describe your approach to and tools used in delivering the workshop to employees who are 55 and over.
- 3.2 Provide two examples of a workshop preparation package that you would send to a client which include at the minimum: agenda, facilities and equipment, catering provisions, course materials for participants and any additional instructions you would typically include.
- 3.3 Please indicate what the minimum, and also maximum, participant level is for your workshops.

**4.0 INNOVATION & VALUE ADD**

- 4.1 Briefly describe any capabilities that make your firm uniquely qualified to provide the requested services, including any innovative approaches you have successfully used with other clients.

**5.0 COST PROPOSAL**

**5.1 Cost**

- a. Please provide the proposed all-inclusive costs for each of the components listed below, involved in the delivery of each workshop, using a scenario of 35 attendees.

Item	1/2 Day	1 Day	2 Day
Facilitator			
Speakers			
Fees: service or honorarium			
Materials			

- b. Please indicate if there are any other costs of which we are unaware.

**SECTION IV - RFIQ RESPONSE FORM – RFIQ #028-2009**

WORKERS' COMPENSATION BOARD OF BRITISH COLUMBIA (WORKSAFEBC)  
6951 WESTMINSTER HIGHWAY, RICHMOND, BC V7C 1C6

<b><i>Company Name:</i></b>
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I/We hereby offer the information in our response to WorkSafeBC for review. I/We understand that this information is provided in response to a Request for Information & Qualification and that nothing in the RFIQ document should be construed as binding on WorkSafeBC or that a contract need be awarded.

**APPENDIX(ES) TO RFIQ:**

WorkSafeBC requests that any appendixes as called for in the RFIQ be completed and attached to this RFIQ Response form. All appendixes form an integral part of this response. I/We enclose:

<b>Appendix A</b>	References
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**ADDENDA**

I/We acknowledge receipt of the following applicable Addenda to the RFIQ:

<b>ADDENDUM:</b>	<b>DATE OF ADDENDUM</b>	<b>FROM PAGES</b>	<b>TO PAGES</b>
Addendum No. 1			
Addendum No. 2			

***Authorized signing officer***

<b><i>Legal / Business Name:</i></b>	
<b><i>Other names under which your Company operates:</i></b>	
<b><i>Address:</i></b>	<b><i>Telephone Number:</i></b>
<b><i>City, Province, Postal Code:</i></b>	<b><i>Fax Number:</i></b>
<b><i>Signature:</i></b>	<b><i>Title:</i></b>
<b><i>Print Name:</i></b>	<b><i>Date:</i></b>
<b><i>Official Email Address:</i></b>	
<b><i>WorkSafeBC Registration Number:</i></b>	

**Any clauses in a document received in response to this procurement process which purports to limit WorkSafeBC's obligations under FIPPA will be considered void and severable from the response. By answering this RFIQ the Respondent will be deemed to have accepted this term.**

**APPENDIX A - REFERENCES**

<i>Company Name:</i>	
<i>Address:</i>	<i>Telephone Number:</i>
<i>City, Province, Postal Code:</i>	<i>Fax Number:</i>

Provide a minimum of two (2) references your organization has completed in BC in the past three (3) years, and that are similar in scope and value to WorkSafeBC's requirements.

<b>1 COMPANY NAME &amp; ADDRESS</b>	
Contact Name	
Telephone No.	
Brief Description of Project	
<b>2 COMPANY NAME &amp; ADDRESS</b>	
Contact Name	
Telephone No.	
Brief Description of Project	
<b>3 COMPANY NAME &amp; ADDRESS</b>	
Contact Name	
Telephone No.	
Brief Description of Project	

**APPENDIX B – PROTECTION OF PRIVACY ASSESSMENT**

**PROTECTION OF INFORMATION AND PERSONAL PRIVACY**  
 The Freedom of Information and Protection of Privacy Act (FIPPA) requires WorkSafeBC and any Service Provider to it, ensures personal information in its custody or under its control is stored or accessed only in Canada except in limited circumstances. As a condition of contract award, the Contractor must provide evidence of their compliance. Submit the following information as an attachment to your submission.

**Further information is available regarding this requirement at: <http://www.msers.gov.bc.ca/privacaccess>.**

<p>1.1 Is your company a subsidiary and/or has any affiliation of any type with any entity outside of Canada?  If yes, state their names and relationships:</p>	<p><input type="checkbox"/> Yes or <input type="checkbox"/> No</p>
<p>1.2 State the legal status of the business. E.g. Sole proprietor, partnership or limited company.                  1.2.1 If the business is a partnership, state the countries where the partners reside;                  1.2.2 If the business is a limited company, state the countries where the directors reside.</p>	
<p>1.3 Is your company wholly owned by a Canadian entity?  If no, state the nature of the foreign ownership:</p>	<p><input type="checkbox"/> Yes or <input type="checkbox"/> No</p>
<p>1.4 Is your company controlled and operated by a Canadian entity?  If no, state the nature of the foreign control and operations:</p>	<p><input type="checkbox"/> Yes or <input type="checkbox"/> No</p>
<p>1.5 State the location where personal information is currently stored, by whom and who would have access to this information.</p>	

<p>1.6 State how and the location where you propose to store and access personal information you obtain from WorkSafeBC, if successful.</p>
<p>1.7 State who provides systems &amp; equipment maintenance and data recovery services for your data systems and state their location. If it is not an employee, answer 1.1 to 2.0 in relation to the proposed subcontractor.</p>
<p>1.8 Provide a description of current employee procedures and rules relating to disclosure, access and control of personal information (e.g. levels of access, circumstances, frequency and familiarity with FIPPA, security clearance requirements).</p>
<p>1.9 Provide a description of an existing operational privacy plan in the event of a security or privacy breach relating to personal information (eg. email breach, home invasion, theft).</p>
<p>2.0 If you propose to subcontract any portion or all of the work under the contract, if you are successful, state where and to whom you intend to subcontract with, and answer 1.1 to 2.0 in relation to the proposed subcontractor.</p>

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<b>APPENDIX C – WORKSAFEBC OVERVIEW CORPORATE PROFILE</b>
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WorkSafeBC (the Workers' Compensation Board) is an independent statutory agency that serves nearly 2.3 million workers and about 197,000 employers throughout British Columbia. It is funded through insurance premiums paid by registered employers and through investment returns. The *Workers Compensation Act* empowers WorkSafeBC to enforce occupational health and safety standards, provide legislated compensation and rehabilitation benefits to injured workers or their dependents, and collect funds from businesses to operate the workers' compensation system. In administering the Workers Compensation Act, WorkSafeBC remains separate and distinct from government. However, WorkSafeBC is accountable to the public through the provincial government, which is responsible for protecting and maintaining the overall well-being of the workers' compensation system.

WorkSafeBC is dedicated to:

- Working with our partners to achieve our vision: keeping workers and workplaces safe and secure from injuries, disease and fatalities.
- Rehabilitating injured workers and returning them to productive, safe employment.
- Providing sound financial management for a viable workers' compensation system.
- Protecting the public interest.

Most of WorkSafeBC's head office operations are located at 6951 Westminster Highway, in Richmond, B.C.

Major regions throughout B.C. are represented by area offices in Abbotsford, Courtenay, Kamloops, Kelowna, Nanaimo, Nelson, Prince George, Terrace, and Victoria. Four Lower Mainland offices are located in Burnaby, Coquitlam, North Vancouver, and Surrey.

WorkSafeBC currently employs in excess of 2,500 people; approximately 2,000 work in the head office facilities, with the balance located in regional centres.

Our mandate to provide insurance coverage to employers and rehabilitation/compensation to injured workers and their families is just the beginning of our commitment. Our mission is to assist the workers and employers of BC to create and sustain a culture of health and safety in the workplace through our compassionate and supportive services, sound decisions and advice, and solid financial stewardship.

Our commitment is to make a difference one human being at a time.