

RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:
Bid Receiving - PWGSC / Réception des soumissions -
TPSGC
Place du Portage, Phase III
Core OA1\noyau OA1
11 Laurier St.\11, rue Laurier
Gatineau, Québec K1A 0S5
Bid Fax: (613) 997-9776

SOLICITATION AMENDMENT
MODIFICATION DE L'INVITATION

The referenced document is hereby revised; unless otherwise indicated, all other terms and conditions of the Solicitation remain the same.

Ce document est par la présente révisé; sauf indication contraire, les modalités de l'invitation demeurent les mêmes.

Comments - Commentaires

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

Issuing Office - Bureau de distribution
Health Services Project Division (XF)/Division des
projets de services de santé (XF)
Place du Portage, Phase III, 12C1
11 Laurier St./11 rue, Laurier
Gatineau
Gatineau
K1A 0S5

Title - Sujet DSLMM PROJECT	
Solicitation No. - N° de l'invitation 24062-140104/A	Amendment No. - N° modif. 006
Client Reference No. - N° de référence du client 24062-140104	Date 2014-01-14
GETS Reference No. - N° de référence de SEAG PW-\$\$XF-005-26490	
File No. - N° de dossier 005xf.24062-140104	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2014-06-30	
Time Zone Fuseau horaire Eastern Standard Time EST	
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Maheson, Vaanee	Buyer Id - Id de l'acheteur 005xf
Telephone No. - N° de téléphone (819) 956-1770 ()	FAX No. - N° de FAX (819) 956-8303
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: See herein.	

Instructions: See Herein

Instructions: Voir aux présentes

Delivery Required - Livraison exigée	Delivery Offered - Livraison proposée
Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Telephone No. - N° de téléphone Facsimile No. - N° de télécopieur	
Name and title of person authorized to sign on behalf of Vendor/Firm (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)	
Signature	Date

Solicitation No. - N° de l'invitation

24062-140104/A

Client Ref. No. - N° de réf. du client

24062-140104

Amd. No. - N° de la modif.

006

File No. - N° du dossier

005xf24062-140104

Buyer ID - Id de l'acheteur

005xf

CCC No./N° CCC - FMS No/ N° VME

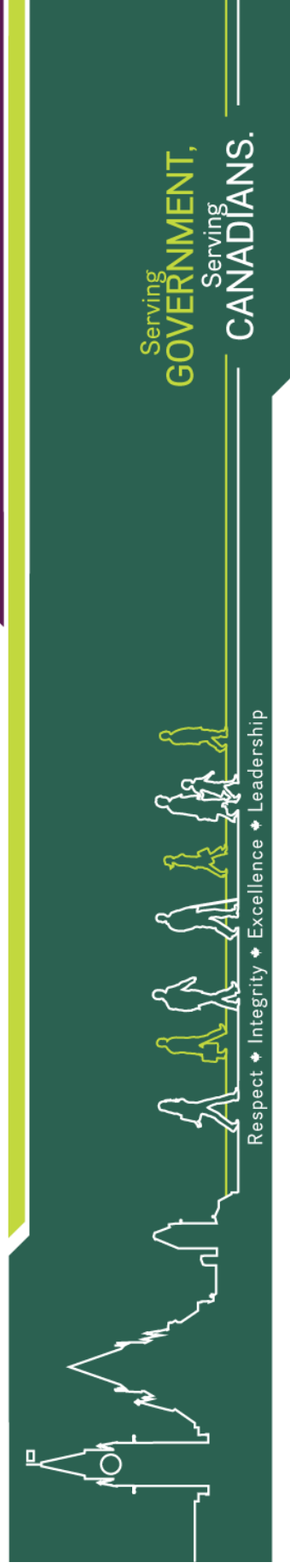
The documents listed below were presented at the Industry Day on December 9, 2013.

- **Transforming the Way We Do Business**
- **Industry Engagement Process**
- **Modernizing Disability and Sick Leave Management in the Federal Public Service**
- **Workplace Wellness and Productivity Strategy**

The first three documents are joined to this notice for more ample information.

The Workplace Wellness and Productivity Strategy can be found at the following site:

[Http://www.tbs-sct.gc.ca/hr-rh/bp-rasp/benefits-avantages/wwps-smtp-eng.asp](http://www.tbs-sct.gc.ca/hr-rh/bp-rasp/benefits-avantages/wwps-smtp-eng.asp)



Disability and Sick Leave Management (DSL) Transformation Project

Industry Day

December 9, 2013



Public Works and
Government Services
Canada

Travaux publics et
Services gouvernementaux
Canada

Canada

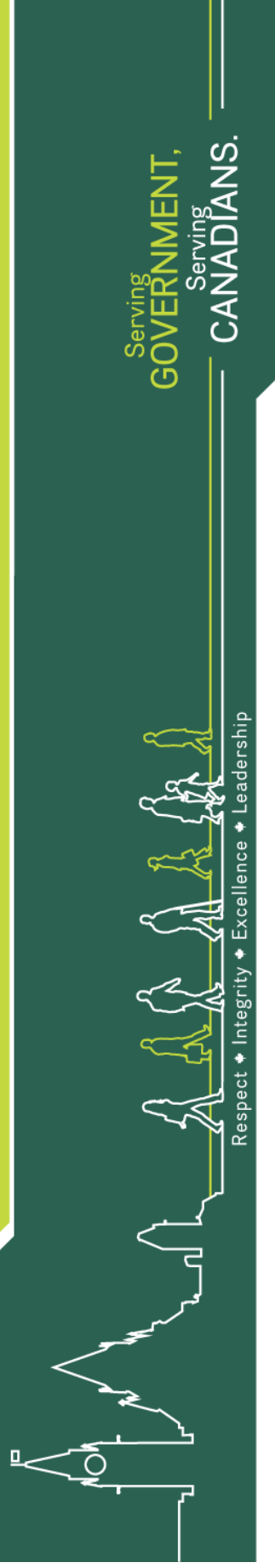


Agenda

- Welcoming remarks
- Transforming the Way We Do Business
- Introduction of the Disability and Sick Leave Management Transformation Project
- Industry Engagement Process
- Questions and Answers
- Health Break
- Modernizing Disability and Sick Leave Management in the Federal Public Service
- Questions and Answers
- Closing Remarks

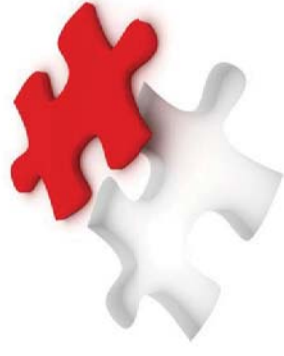
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Transforming the Way We Do Business

December 9, 2013



Pablo Sobrino
AADM, Acquisitions Branch
Public Works and Government Services Canada

Change Drivers

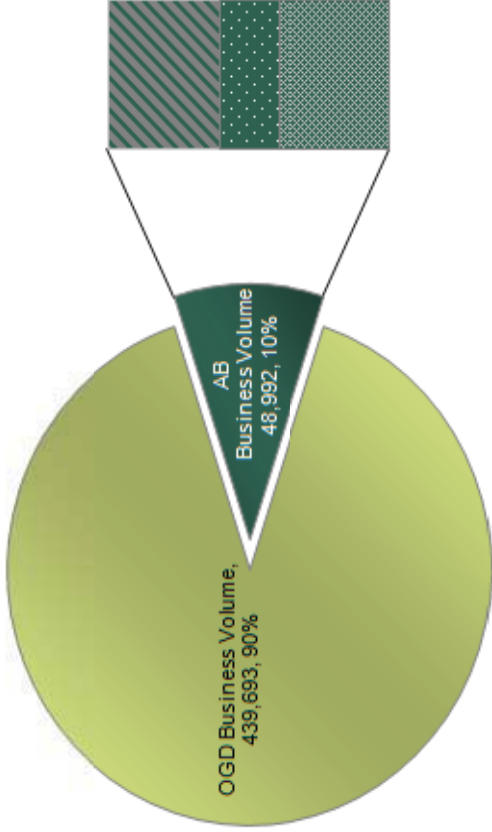
- Financial pressures
- Shifting expectations/needs of clients and suppliers
- People challenges
- Technological opportunities



Federal Procurement Environment

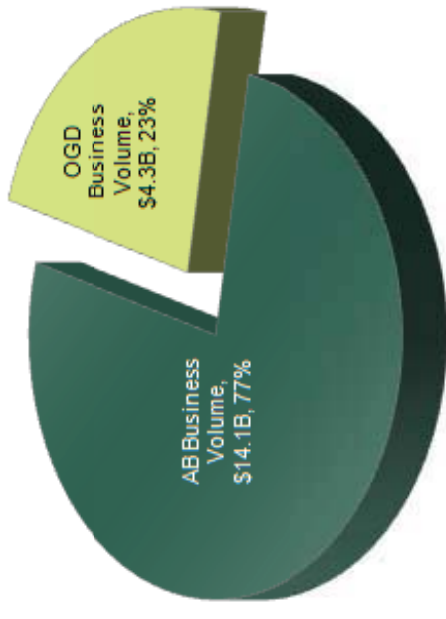
Federal Procurements:

Number of Documents



Federal Procurement:

Contracted Value



Sources: All figures are generated from the Business Analytics Services, which includes

- (1) Purchasing Activity Report: Annual report on department awarded procurements (3-year average – CY2009-2011);
- (2) Acquisition Information Services (AIS): AB procurements (3-year average – FY2010/11-2012/13);



Shaping Procurement Together

– That's Smart!



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Public Works and
Government Services
Canada

Travaux publics et
Services gouvernementaux
Canada

Canada

Early Engagement

Engaging early, at the time needs are first identified is a contributing success factor to strategic procurement

- Engagement at needs identification
- Two way dialogue with our clients and suppliers



Effective Governance

Strong governance is key to ensuring oversight and upholding the integrity of the process

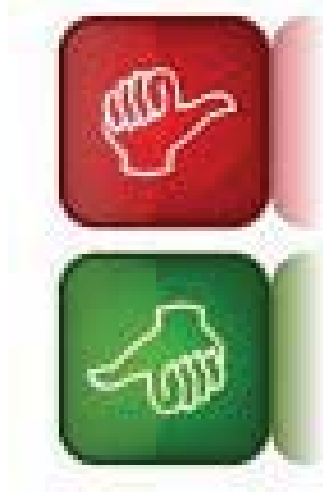
- Oversight, roles and responsibilities
- Establishing dispute resolution mechanisms
- Allowing structured dialogue & collaboration



Independent Advice

Independent, impartial advice and expertise:

- Ensures the integrity of the procurement process (fair, open and transparent)
- Enables validation or benchmarking with experts in a specific field or market



Benefits for Canadians

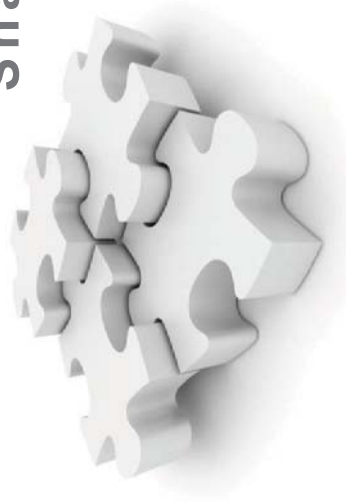
- Canadian economic growth
- Job creation
- Global competitiveness, innovation
- Industrial and regional benefits
- Green procurement and sustainable development
- Opportunities for Small and Medium Enterprises, Aboriginals



How can you help?

PARETROACTION.APFEEDBACK@TPSGC-PWGSC.GC.CA

Shaping Procurement Together
– *That's Smart!*



- EARLY ENGAGEMENT
- EFFECTIVE GOVERNANCE
- INDEPENDENT ADVICE
- BENEFITS FOR CANADIANS

ACQUISITIONS PROGRAM

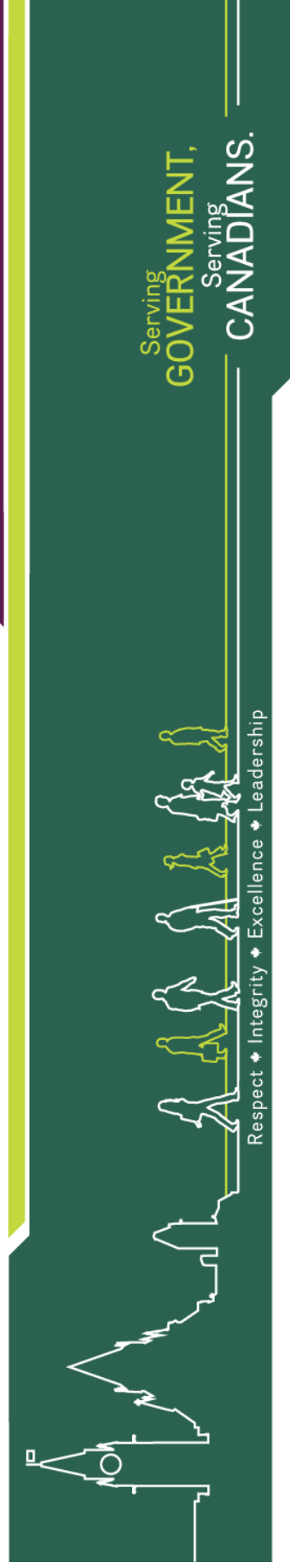
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Public Works and
Government Services
Canada

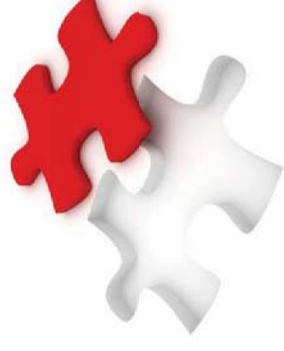
Travaux publics et
Services gouvernementaux
Canada

Canada



Industry Engagement Process

Disability and Sick Leave Management Project



December 9, 2013

Normand Masse
DG, Services and Technology Acquisitions Management Sector
Public Works and Government Services Canada



Public Works and
Government Services
Canada

Travaux publics et
Services gouvernementaux
Canada

Canada



DSL M Objectives

- On June 10, 2013, the Government of Canada announced its intent to modernize disability and sick leave management in the Federal Public Sector.

“It’s time we fix an inefficient system that doesn’t work for employees, who need the support, or for Canadian taxpayers, who are footing the bill,” said Minister Clement. “The workplace has changed dramatically since 1970 and we need to find a more effective and efficient way to help employees get back to work as quickly as possible.”

- Treasury Board of Canada Secretariat, as the Public Service employer, is leading the modernization initiative. As a part of this process, PWGSC will be managing the procurement for services to administer and manage the disability plans.



Procurement

- Disability claim management/administration services to support the new plans for the federal public service, including:
 - receiving and adjudicating disability claims under the disability plans;
 - conducting case management to facilitate timely return to work; and/or
 - issuing disability benefit payments to employees.
- Currently no short-term disability plan administration contract
- Existing long-term disability plan contracts are with:
 - Sun Life
 - Industrial Alliance





Engagement Objective

- Assess the level of industry interest/capacity;
- Gather input on the potential service delivery options;
- Determine the key service elements and parameters that drive pricing and availability; and,
- Solicit input on the development of a procurement strategy.
 - Number of procurements and contracts? Contract(s) duration? Insured vs. Self-insured?





Engagement Process

PWGSC/TBS are looking to engage industry as follows:

- 1. Industry Day:** December 9, 2013
- 2. One-On-One Meetings:** December 10 to 13, 2013
The one-on-one meetings are an opportunity for Canada and industry participants to meet individually to discuss concerns, recommendations and possible options.
- 3. Request(s) for Information (as required):** January to June 2014
Continuously seek information from Participants as we work on developing solicitation documents.

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Engagement Process (Cont'd)

4. Working Group Meetings (as required): February to June 2014

Meetings to discuss concerns, recommendations and options as a group while Canada develops solicitation documents.

Working group sessions may include the following topics:

- Procurement strategy;
- Draft Statement of Work;
- Draft Evaluation Criteria;
- Draft Basis of Payment; and/or
- Draft RFP

5. Draft RFP: June 2014

A draft RFP may be posted on GETS to obtain feedback to round out the engagement process.



Engagement Process (Cont'd)

Third Party Consultation

Third parties will be consulted on an as required basis to validate information or discuss industry issues and recommendations.

Examples:

- Fairness Monitor
- Disability Benefit Consultants

Treatment of information

GC will handle any material or information provided by industry in accordance with the applicable Acts and Regulations.



Engagement Process (Cont'd)

Communication with industry

- Contracting Authority may communicate with Participants through direct email rather than by posting additional notices on the GETS.

Participation not mandatory

- Participation is not a mandatory requirement. Not participating in the Engagement Process, will not preclude a supplier from submitting a bid to any resulting bid solicitation.

Engagement and Solicitation Process

Stage 1: Engagement Process

Key Milestones

Industry Day – December 9, 2013
One-on-one meetings – December 10-13, 2013
RFI(s) – January to June 2014
Working group meetings – February to June 2014
Draft RFP – June 2014
TB Project Approval Gate – July 2014

Stage 2: Procurement Process

Key Milestones

RFP – August 2014
Bid Evaluation Complete – May 2015
TB Approval & Project Approval Gate – July 2015
Contract award – July 2015
Project Approval Gate – June 2016
Implementation - TBD





Questions?



Treasury Board of Canada
Secrétariat

Secrétariat du Conseil du Trésor
du Canada

Better government: with partners, for Canadians

Industry Day: Modernizing Disability and Sick Leave Management in the Federal Public Service

Monday December 9, 2013

Canada

Purpose

- Launch a process for exploring current disability management practices to help the Government of Canada develop a disability and sick leave management system, at par with industry standards and practices in other jurisdictions:
 - this could possibly lead to the development of Statement of Work for the procurement of disability management programs and services in the areas of *non-Occupational and occupational Illness/Injury*.

Sick leave and related provisions are not the focus of this presentation and will be negotiated during the next round of collective bargaining. Workplace wellness and prevention activities also fall out of scope.

Context

- The Government of Canada is looking to improve disability and sick leave management by replacing its currently fragmented approach with one that provides fair, comprehensive, and seamless coverage. This is consistent with:
 - the government’s desire to find efficiencies in operations, enhance productivity, and bring public service compensation in line with comparable public and private sector employers;
 - Budget 2013 commitment to “examine its human resources management practices and institutions in a number of areas, including disability and sick leave management, with a view to ensuring that public servants receive appropriate services that support a timely return to work;” and
 - October 2013 Throne Speech that restated the government’s commitment to modernize its disability and sick leave management and “reform disability and sick-day entitlements and work with employees to get them back to work as soon as possible.”

Current System

- Most federal employees accumulate up to 15 days of paid sick leave annually. Unused days can be carried over and can be used for income replacement before eligibility for Long-Term Disability.
- Two long-term plans in the federal public service. Both have a 13-week waiting period, are mandatory, and end at age 65:
 - in 2012 the long-term disability insurance plan covered 233,000 members, and the public service management insurance plan covered an additional 45,000.
- Both plans top up disability awards available from other sources to 70 percent of insured salary.
 - main offsets are the Canadian Pension Plan / Quebec Pension Plan and Public Service Superannuation.
- In 2012 the combined incidence rate for the two plans was 13 per 1,000, with a prevalence rate of 4.8 percent.

Gaps in the Current Approach

- Data suggests that a large number of federal public servants are not well served by the current Disability and Sick Leave Management system.
- More than half of employees in the core public administration do not have sufficient sick leave credits to cover the 13-week period before long-term disability eligibility thus are at financial risk:
 - 25 percent of employees have under two weeks of sick leave credits; and
 - 58 percent had sick leave credits of 10 weeks or less.
- The current approach does not systemically enable early intervention and active case management, essential for timely and successful return to work outcomes:
 - employees cannot access long-term disability rehabilitation services before the 13-week waiting period; and
 - those with more than 13 weeks of sick leave credits wait until the exhaustion of all their sick leave.

Impact of Absenteeism

- Under the current government approach to disability management, if an employee become ill or suffers an injury they are generally expected to be away from work until they fully recover.
- Emerging research however indicates that prolonged absenteeism can have a number of negative outcomes for individuals:
 - the Conference Board of Canada reports that the likelihood of an employee returning to work from a prolonged health related absence falls to 50 percent after only six months away from the workplace; and
 - the Canadian Medical Association notes that prolonged absence from work can harm an individual's mental, physical, and social well-being.

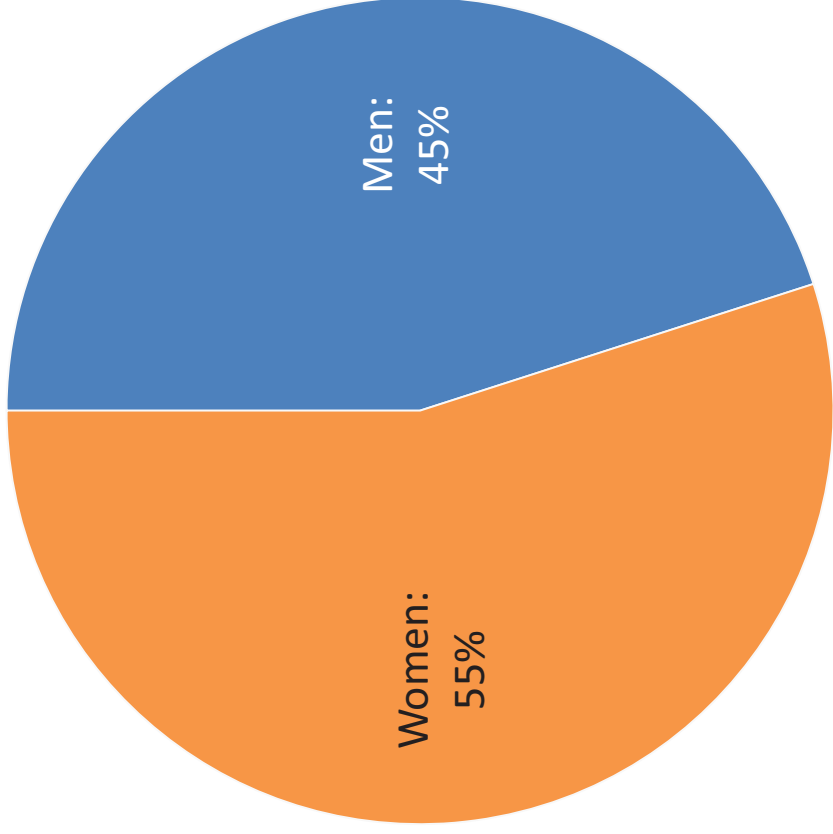
Disability Management Needs Modernizing

- The current system for disability and sick leave management in the federal public service is:
 - out-of-date and fragmented;
 - not a coherent approach (existing elements are not seamlessly linked);
 - out of step with current practices (majority of other Canadian jurisdictions and the private sector use short-term disability support); and
 - inadequate in providing active case management;

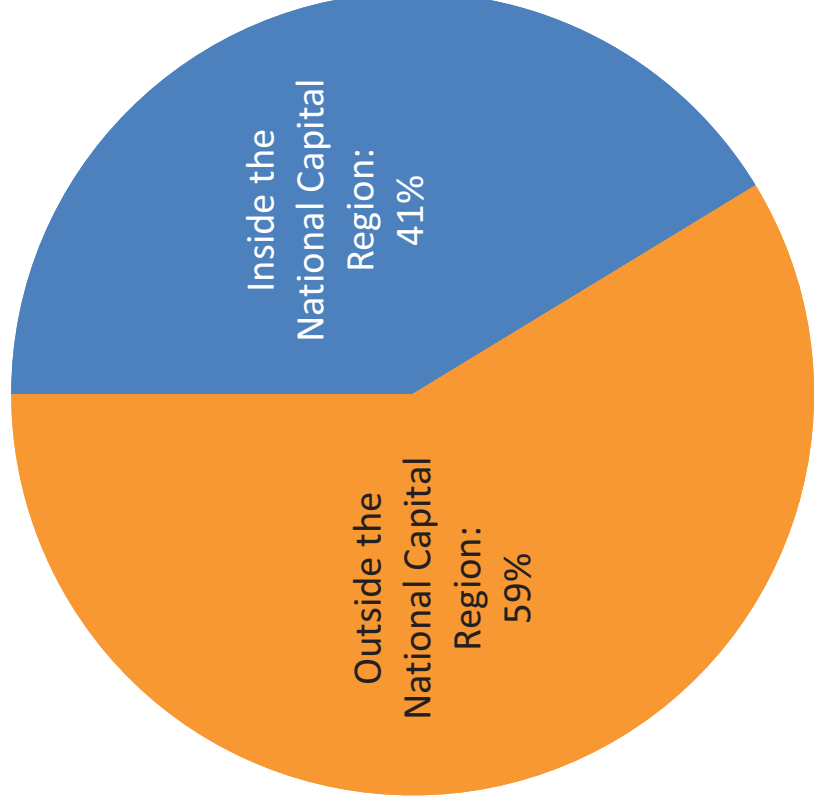
Vision for Disability and Sick Leave Management

- The government believes in supporting healthy workplaces focused on wellness and is committed to helping employees through:
 - active case management via short and long-term disability plans;
 - income replacement;
 - workers compensation benefits;
 - accommodation of disability in the workplace; and
 - employee assistance and wellness supports.
- These activities are intended to:
 - encourage a healthy return to work at the earliest opportunity;
 - reduce the financial impact among those with limited sick leave credits;
 - ensure employees receive treatment and support when needed; and
 - facilitate employees' safe and timely reintegration into the workplace.
- The government wants to work with employees, bargaining agents, and service providers to implement this new approach.

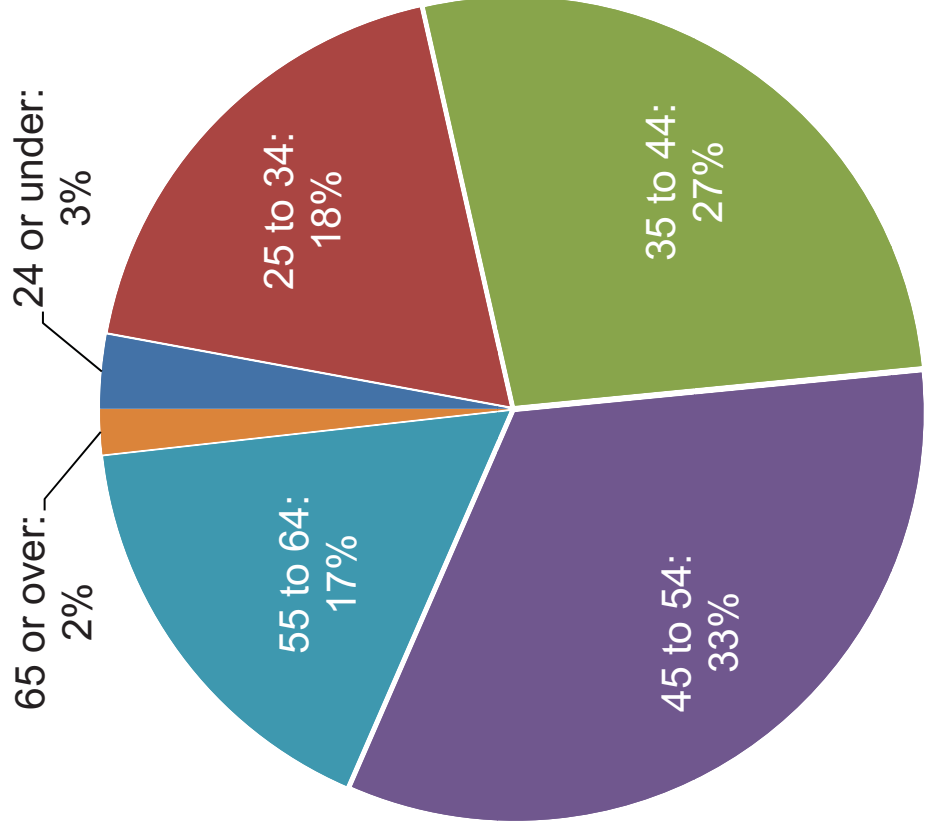
More women than men are employed in the Federal Public Service



More than half of Federal Public Service employees work outside the National Capital Region



Most employees of the Federal Public Service are between 45 and 54 years of age (mean age is 44.8; median age is 45.6)



Operational Concepts

- A modernized disability and sick leave approach would help the government:
 - improve workplace wellness;
 - improve support for ill/injured employees return to work, when possible;
 - reduce the human cost of illness, injury and disability (i.e. cost to individual's health and well-being);
 - strengthen injury and illness prevention;
 - promote the efficient use of resources and support services;
 - improve the coordination and accountability of externally provided disability management services; and
 - ensure compliance with applicable legislation (e.g., *Canadian Human Rights Act*, *Duty to Accommodate*, etc.).

The Proposed Approach

- The proposed approach would be similar to the practices and norms adopted by other large Canadian employers. Specifically, the new approach to disability and sick leave management could include:
 - providing a number of discretionary sick leave days;
 - creating a short-term disability plan which provides income replacement and emphasizes early intervention and return to work;
 - establishing a single long-term disability plan that is fully integrated with the new short-term plan;
 - enhancing the Employee Assistance Program and other prevention and wellness measures; and
 - streamlining and modernizing government employee compensation for injury on duty occupational claims.

Recognizing that the collective bargaining will further inform the process, we want to hear from industry if this is the right approach to attaining intended results.

Short-Term Disability Plan

- A short-term disability plan would apply to all absences and/or situations where medical management activities can help an employee regain pre-illness/injury functionality or remain at/return to work in a safe and timely manner.
- It could triage claims (occupational and non-occupational), route to applicable Workers' Compensation Boards (WCB), and adjudicate non-occupational claims.
- The government wants to hear from industry about best practices in the areas of:
 - claims adjudication services for non-occupational claims;
 - income replacement for accepted claims;
 - rehabilitative services and care;
 - service standards such as turn-around times;
 - return-to-work support(s); and
 - the best ways to transition from the short-term plan to the long-term plan when an employee requires extended time away from work for health reasons.

Long-Term Disability Plan

- The government intends to replace its two fully insured long-term disability plans with a single plan that provides benefits to all employees.
- The government wants to hear from industry about best practices in the administration of long-term disability plans, including:
 - claims adjudication and administration;
 - disability management services similar to short-term disability plans; and
 - income replacement in accordance with current practices.
- Once implemented, the current 13-week waiting period to access long-term disability will be replaced by the duration of the short-term disability plan, yet to be determined.

Occupational Claims

- Work related claims are administered by the Labour Program in Employment and Social Development Canada under the *Government Employee's Compensation Act*.
- When an employee is affected by workplace injury, a workers' compensation claim is filed with the relevant WCB by the Labour Program. WCBs adjudicate claims, case manage approved claims, and retain final authority over decisions rendered. Employees with rejected claims may appeal the decision to the WCB.
- Approved claims are compensated at 100 percent of salary by the government through injury on duty leave (IODL) for up to 130 working days. If a decision is made to discontinue the provision of IODL, the employee can receive income replacement benefits from the WCB.
- Modernization would ensure:
 - timely reporting and administration of occupational claims; and
 - better collection and analysis, plus standard performance measures and metrics.
- The government wants to hear from industry about other supports that can be offered under the short-term disability plan, such as:
 - support and advice as required for arbitration and worker's compensation cases and hearings; and
 - serving as expert witness during workers compensation board appeals.

Broad Requirements and Parameters

- Requirements for the administration of the short-term plan and long-term plan could be bundled into three broad components:
 1. **Services:** provision of active case management, including adjudication of non-occupational and return-to-work supports;
 2. **Administration:** ability to interact with existing government infrastructure, such as human resources management systems and with WCBs; and
 3. **Reporting / Accountability:** the government of Canada will retain ownership of data collected, data are to be reported on a regular basis, and subject to audit.

The parameters presented here are illustrative.

The Statement of Work will outline the details for all business requirements.

Services

- The government intends to procure disability management administration services in accordance with industry standards and government directives.
- All services would need to be offered in both official languages including, but not limited to, discussions with claimants and written communications.
- Information about benefits and eligibility requirements must be easily accessible to employees, and in both official languages.
- Need to provide information on industry trends and changes, along with advice and recommendations to improve programs and implement changes.
- Cooperate and collaborate with other services such as the Employee Assistance Program and WCBs to ensure seamless services to employees.

Administrative

- The government may require all third-party staff providing disability management services to have National Institute of Disability Management and Research certification, or equivalent.
- The service provider(s) may be required to:
 - interface with government internal human resources applications for sick leave management;
 - address business, systems, and security requirements as would be outlined in the Request For Proposals. This could include tracking claims and reporting requirements; and
 - provide a secure location and personnel that conforms to the government's information technology and security requirements.
- The government may require service provider(s) to bear the responsibility for responding to privacy requests and access to information requests.

Reporting and Accountability

- In procuring the short-term plan's administrative services and administration of the long-term disability plans, the government would want to ensure service provider(s)' ability to:
 - produce government-approved quality assurance measures such as client satisfaction surveys on service quality, timeliness, usefulness, etc.;
 - maintain employee case file(s) containing both hard and/or soft copy data of all documents relative to disability management services, and make them available to the government as needed;
 - exchange data with Public Works and Government Services Canada in its capacity as payroll administrator concerning benefits entitlement and enrolment status;
 - ensure secure transmission of confidential employee records; and
 - maintain information and provide government access to information for the purpose of conducting audits.
- Knowledge of public and private sector disability management programs and federal and provincial legislation that impacts disability management will be necessary.

Considerations

- The new approach would apply to all employees of the federal public service, including those employed in the Core Public Administration and by separate employers. As of fall 2013 this population accounted for approximately 250,000 full-time equivalent.
- Many of those who become ill or injured tend to stay on leave for a considerable number of consecutive days. According to compiled data from core public service employees' leave requests for 2011-2012:
 - about 15 percent of employees had at least one sick leave absence lasting more than five consecutive working days; and
 - those who were absent for more than five days were away from work for an average 25 days.
- While the service provider(s) will have some discretion in how to achieve government desired outcomes, they must meet all applicable government policies, directives, regulations, and legislative requirements, such as security needs and privacy safeguards.
- Active involvement of departmental managers will also be key to success for effective prevention, accommodation, and return-to-work.

Key Service Provider Requirements

It is expected that the private sector supplier's service delivery would meet the following data sovereignty requirements:

1. the application services, data, and infrastructure will be established within the geographic boundaries of Canada and under Canadian control;
2. government information is secured at all times and is only accessed by those authorized to access the data;
3. it must be recognized:
 - a) Canada's right to order the destruction or deletion of data;
 - b) compliance with government's privacy and security policy instruments and practices, and recognition of the government's notification regarding privacy and security breaches; and
 - c) it is mandatory that the data remain sovereign and not accessible (nor disclosed) to any other jurisdiction.

Summary

- The government of Canada is committed to improving the wellness and well-being of its employees. Employee wellness and productivity go hand in hand.
- The current disability management system in the federal public service is old, fragmented, and inhibits early access to case management and return-to-work services.
- The creation of a short-term disability plan would seamlessly bridge sick leave and long-term plan coverage for all employees. A modernized approach to sickness and disability will also provide the right supports to address emerging issues such as mental health in the workplace.
- While we recognize that industry will propose solutions and collective bargaining will shape the approach, the government is eager to hear from industry about how best to achieve the desired outcomes while incorporating the key principles.

Useful Web-Sites

- PWGSC: Pay and Pension Services for Government Employees
 - <http://www.tpsgc-pwgsc.gc.ca/remuneration-compensation/index-eng.html>
- PWGSC: Compensation Annual Report 2010-2011
 - <http://www.tpsgc-pwgsc.gc.ca/remuneration-compensation/annual-annual/annual-rprt-10-11-eng.html#a1>
- TBS: Public Service Benefit Plans – Overview
 - <http://www.tbs-sct.gc.ca/hr-rh/bp-rasp/benefits-avantages/overview-apercu-eng.asp>