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RETOURNER LES SOUMISSIONS À:

Bid Receiving Public Works and Government
Services Canada/Réception des soumissions Travaux
publics et Services gouvernementaux Canada
Cabot Place, Phase II, 2nd Floor
Box 4600
St. John's, NL
A1C 5T2
Bid Fax: (709) 772-4603

Revision to a Request for a Standing Offer

Révision à une demande d'offre à commandes

Regional Individual Standing Offer (RISO)

Offre à commandes individuelle régionale (OCIR)

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

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

Comments - Commentaires

Vendor/Firm Name and Address

Raison sociale et adresse du
fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution

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

Title - Sujet SO Vocational Rehabilitation		
Solicitation No. - N° de l'invitation G9292-214643/A		Date 2020-05-11
Client Reference No. - N° de référence du client G9292-214643		Amendment No. - N° modif. 002
File No. - N° de dossier XAQ-9-42128 (021)	CCC No./N° CCC - FMS No./N° VME	
GETS Reference No. - N° de référence de SEAG PW-\$XAQ-021-7420		
Date of Original Request for Standing Offer Date de la demande de l'offre à commandes originale		2020-04-22
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2020-06-04		Time Zone Fuseau horaire Newfoundland Daylight Saving Time
Address Enquiries to: - Adresser toutes questions à: Lacey (XAQ), Rhonda		Buyer ID / Id de l'acheteur xaq021
Telephone No. - N° de téléphone (709) 730-1597 ()	FAX No. - N° de FAX (709) 772-4603	
Delivery Required - Livraison exigée		
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction:		
Security - Sécurité This revision does not change the security requirements of the Offer. Cette révision ne change pas les besoins en matière de sécurité de la présente offre.		

Instructions: See Herein

Instructions: Voir aux présentes

Acknowledgement copy required Accusé de réception requis	Yes - Oui <input type="checkbox"/>	No - Non <input type="checkbox"/>
The Offeror hereby acknowledges this revision to its Offer. Le proposant constate, par la présente, cette révision à son offre.		
Signature	Date	
Name and title of person authorized to sign on behalf of offeror. (type or print) Nom et titre de la personne autorisée à signer au nom du proposant. (taper ou écrire en caractères d'imprimerie)		
For the Minister - Pour le Ministre		

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

Amd. No. - N° de la modif.
002
File No. - N° du dossier
XAQ-9-42128

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

AMENDMENT 002

Amendment 002 is being issued to replace Annex A and B in the original RFSO. Please see revised Annex A and B.

ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED

ANNEX "A"

STATEMENT OF WORK

1.0 TITLE:

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

2.0 OBJECTIVES:

The objectives to be achieved by the service provider are:

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

3.0 BACKGROUND:

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

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

The CPPD VR program was established to provide individualized, reasonable and cost-effective rehabilitation services to beneficiaries with all types of disabilities, whose medical condition is stable and who have a reasonable expectation of successfully returning to work at the substantially gainful level as defined by [section 68.1 of the Canada Pension Plan Regulations \(http://laws-lois.justice.gc.ca/eng/regulations/C.R.C.,_c._385/page-11.html?txthl=68#s-68\)](http://laws-lois.justice.gc.ca/eng/regulations/C.R.C.,_c._385/page-11.html?txthl=68#s-68).

The two sections of the CPP Regulations that govern the delivery of the vocational rehabilitation program are [Section 69 \(2\) \(http://laws-lois.justice.gc.ca/eng/regulations/C.R.C.,_c._385/page-11.html?txthl=69+2#s-69\)](http://laws-lois.justice.gc.ca/eng/regulations/C.R.C.,_c._385/page-11.html?txthl=69+2#s-69) and [Section 70 \(http://laws-lois.justice.gc.ca/eng/regulations/C.R.C.,_c._385/page-11.html?txthl=70#s-70\)](http://laws-lois.justice.gc.ca/eng/regulations/C.R.C.,_c._385/page-11.html?txthl=70#s-70).

4.0 SCOPE:

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

4.1 SERVICE PROVIDER RESPONSIBILITIES:

- To participate in an orientation session regarding the CPPD VR program and to adhere to the process as explained;
- To ensure that all staff have a current enhanced reliability status;

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

4.2 SERVICE PHILOSOPHY:

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

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

4.3 SERVICE PROVIDER STAFF:

Vocational Rehabilitation Consultants

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

Mandatory Minimum Criteria

There is a mandatory requirement to provide bilingual services in Sudbury, ON (area 7), and NB (area 11).

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

Vocational Rehabilitation Consultants:

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

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

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

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

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

5.0 TASKS:

Upon referral from the Service Canada VRCM, the service provider will deliver vocational rehabilitation services while respecting the agreed to roles of each party as explained in the orientation session. Details of the assessment, planning, and intervention phases will be explained in the orientation session to service
Service Providers will be paid their firm hourly rate only for services provided by approved rehabilitation consultants, up to the maximum hours stipulated within each rehabilitation phase. Work performed by any other staff member should not be invoiced and will not be paid. Additional hourly fees for service will only be paid when approval from the Service Canada VRCM is obtained in writing prior to hours worked. Requests for additional hours are performed at no cost.

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

The government of Canada strives to ensure that the goods and services it procures are inclusive by design and accessible by default, in accordance with the Accessible Canada Act, its associated regulations and standards and Treasury Board Contracting Policy. Communication with participants and the deliverables produced as part of the scope of work must be in

accessible formats. The provision of facilities, tools, and services, and all associated costs to make the components and deliverables accessible will be at the Service Provider's expense.

5.1 ASSESSMENT PHASE:

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

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

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

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

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

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

5.2 PLANNING PHASE:

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

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

The IWRP must:

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

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

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

5.3 INTERVENTION PHASE:

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

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

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

Case management and service coordination will include:

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

5.4 FINANCIAL SERVICES ONLY:

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

6.0. CONSTRAINTS:

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

6.1 USE, RETENTION, DISPOSAL AND SECURITY OF INFORMATION:

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

Personal information is to be stored in a secure place as per the Canadian Industrial Security Directorate.

- For the purposes of allowing the service provider to perform the work under the contract, Service Canada shall make available to the service provider, in accordance with the section 69 and 70 of the *CPP* Regulations and other applicable laws governing the protection of information under its control, information required to assist the participant in their return to work, which is stored in ESDC's Personal Information Bank (PPU 146).
- For the purpose of performing the work under the contract, the service provider shall collect, on behalf of Service Canada, any required information as discussed with the Service Canada VRCM.
- The service provider shall:
 - inform the individual (i.e. vocational rehabilitation participant) of the purpose of the collection, including any statutory authority for the collection, of their right to refuse to provide any or all of the requested information and any possible consequence of such refusal, and of their right of access and correction.
 - make every effort to ensure the accuracy of the information collected.
 - not collect, use or disclose the information respectively referred to in sections 1 and 2 except for the purpose of performing the work under the contract.
 - maintain all information referred to in bullets 1 and 2 above, and make sure it is only accessible, in Canada.
 - segregate all records containing information referred to in bullets 1 and 2 above (whether in electronic formation or in hard copy) from its other records, and keep all databases in which such records are to be maintained physically independent from all other database, directly or indirectly, which is located outside Canada.
 - ensure that all aspects of the processing of information referred to in bullets 1 and 2 above are conducted and only accessible in Canada.
 - ensure that every person of whom it retains to fulfil its obligations under this contract, knows and complies with all the terms and conditions of this contract with respect to the protection of information referred to in bullets 1 and 2 above.
- Unless otherwise required by law or authorized in writing by the individuals to whom that information relates, the service provider will ensure that no information referred to in bullets 1 and 2 above, is disclosed to a third party for a purpose authorised herein, unless there is a written agreement between the service provider and the third party, imposing upon the third party obligations that are the same as those that are imposed upon the service provider under this contract with respect to the protection of this information.
- The information referred to in bullets 1 and 2 above remains at all times under the control of Service Canada.
- The information referred to in bullets 1 and 2 above is protected by the *Privacy Act* (<http://laws-lois.justice.gc.ca/eng/acts/p-21/>) and any other applicable federal laws governing the protection of personal information held by federal institutions.

- The Service Provider personnel (employees, contractors, sub-contractors) requiring access to PROTECTED information, assets or work site(s) must each hold a valid reliability status, granted or approved by the CISD, PWGSC, and are given access to VR participants' information on a need to know basis.
- Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, upon expiry or termination of the contract, whichever is earlier, the service provider shall (return to Service Canada) the information (paper or electronic) referred to in bullets 1 and 2 above copies thereof, if any. All paper files are to be sent back to the department following Protected B security (via mail: double enveloped, gum-sealed, with no security marking on the outer envelope). If electronic files exist, they are to be sent back to the department following Protected B security (as indicated above) by encrypted email or CD. When returning records, information must be segregated by participant. This will be arranged in consultation with the Service Canada VRCM.

6.2 VALIDATION FOR PHYSICAL SECURITY:

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

6.3 NETWORK SERVICES:

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

7.0 OUTCOMES / DELIVERABLES:

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

7.0.1 Assessment Phase:

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

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

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

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

7.0.5 Planning Phase:

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

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

7.0.7 Amended Individual Written Rehabilitation Plan (AIWRP): must be submitted as directed by the Service Canada VRCM when there is a significant change in the participant's health status or a significant change to the original IWRP. The amended return to work plan must be submitted within 14 days of VRCM approval to amend the IWRP.

7.0.8 Intervention Phase:

Progress Report: must be submitted a minimum of every 90 calendar days or at a greater frequency as negotiated with the Service Canada VRCM, normally only when activity justifies an

update, and should follow the content outlined herein. All correspondence and documentation generated and/or obtained during the reporting period must be attached to the report. In addition to reporting all relevant activities within the period covered, the report should provide a summary of contacts including the dates, participant observations, emerging barriers, evidence of capacity or incapacity for work, specific recommendations (and justifications for significant changes), assessment on successful outcome(s), future outcomes and requested actions to the Service Canada VRCM (See Appendix "E").

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

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

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

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

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

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

7.0.9 (b) Return to Work Follow-up Report: a minimum of one report must be submitted at the end of the sixth week of each three-month work trial period (additional reports may be required by the Service Canada VRCM). The report must include details of the job (title/type/earnings and amount of hours worked on a weekly basis), an evaluation of performance by the supervisor (if appropriate) and participant, identification of problems/issues, recommendations for workplace accommodations or specialized equipment, record of attendance at work (can be provided by the participant if not self-disclosed to the service

provider), **copies of the pay stubs** and recommendations (See Appendix "H": Return to Work Follow-up Report).

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

7.1 INVOICING METHOD:

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

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

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

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

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

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

8.0 RATES:

Service Providers will be paid their firm hourly professional rate up to the maximum hours stipulated within each rehabilitation phase as per the basis of payment. **No services are to be initiated prior to** receiving the individual call up from Service Canada's procurement department. No services are to go beyond the initial assessment prior to having confirmation from the SC VRCM. Of note: the participant's call up **may** indicate additional hours to cover unexpected requirements, **however, the service provider is to contact the SC VRCM prior to accessing any of the additional hours.**

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

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

8.1 PARTICIPANT DISBURSEMENT AND TRAVEL EXPENSES:

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

Disbursements may include but are not limited to the following:

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

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

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

8.2 SERVICE PROVIDER DISBURSEMENT AND TRAVEL EXPENSES:

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

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

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

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

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

9.0. PERFORMANCE OUTCOMES:

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

ANNEX B - EVALUATION

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

1. MANDATORY EVALUATION CRITERIA:

- The bidder is required to provide services in both official languages for (Area 7) Sudbury, ON. and (Area 11) New Brunswick.

MET: ____ YES MET: ____ NO OR NOT APPLICABLE ____

____ Not bidding on Area 7 or ____ Not bidding on Area 11

- Vocational Rehabilitation Consultants

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

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

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

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

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

2. POINT RATED EVALUATION CRITERIA:

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

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

6) Case Study (see Appendix A)

40 points

Total

150 points

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

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

TECHNICAL PROPOSAL:

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

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

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

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

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

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

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

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

2. FINANCIAL BID EVALUATION

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