REQUEST FOR PROPOSAL # CCVE-002
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1.0 NOTICE TO PROONENTS

The Request for Proposal (the “RFP”) process will be administered by the “Selection Committee” - a subcommittee of the Canadian Assessment, Vocational Evaluation and Work Adjustment Society (CAVEWAS).

Please submit your proposal addressed to the Selection Committee, clearly identifying the Proponents Name, the RFP number and the RFP title. Electronic submissions are accepted (via email). We request submissions of no more than 12 pages, not including appendices.

The deadline for questions relating to this RFP is 5:00pm (EST) on March 15, 2016, and questions will be submitted to the President of the Board of Directors for CAVEWAS (for distribution to the Selection Committee) by email at jchladny@metricsvocational.ca.

The responses for the RFP for this project will be received via email until 5:00pm (EST) on March 31, 2016. All proposals will be addressed to the Selection Committee, attention of:

Ms. Jennifer Chladny, B.A., RRP, CVRP
CAVEWAS Board of Directors President,
905-951-7957 (office); 905-951-7582 (fax)
jchladny@metricsvocational.ca

PROPOSALS RECEIVED AFTER THE CLOSING DATE WILL NOT BE CONSIDERED.

Please note that questions involving proprietary information given by a proponent will be considered confidential. The Selection Committee will not be bound by any interpretation or information given to any proponent orally.

No proponent shall have any claim for any compensation of any kind whatsoever as a result of participating in this proposal process, and by submitting a proposal, each proponent shall be deemed to have agreed not to make any claim or demand, nor bring any action or suit or petition against the Selection Committee for any damages such proponent may have sustained by participating in this proposal process. All proposals will remain confidential, subject to the Freedom of Information and Privacy Act.

The Selection Committee does not bind itself to accept any proposal, and reserves the right to withdraw from, or cancel, the proposal process at any time.
CAVEWAS has signed a Memorandum of Agreement with the College of Vocational Rehabilitation Professionals (CVRP) who have developed the application process and criteria, the certification exam, and supporting documentation for those pursuing the Canadian Certified Vocational Evaluator (CCVE) credential. The CCVE credential is currently in the Grandfathering Phase (Phase 1) for those holding CVE and ABVE F/D designations. Phase 2 will shortly be underway. However, in addition to supporting those who are preparing to write the CCVE exam in future, the intent is to provide training and CEU’s within all 8 of these core competencies which is available and accessible to all members.

3.0 PROJECT SCOPE

The Project
The Selection Committee seeks to have developed curriculum and training for all 8 of the CCVE core competencies, which will assist those preparing for the CCVE exam and enhance the learning for those interested in the further development of their assessment skills and knowledge. Upon completion of this training the member would be eligible for CEU’s.

We are looking at considering a number of different formats (e.g., workshop, seminar, online) and this training can be developed to target specific audiences within our membership (e.g., fundamental, intermediate and advanced training levels).

We are also interested in considering proposals for curriculum that is developed and is then owned by CAVEWAS (to be used at their discretion for later training), in addition to proposals that reflect a more partnership or profit-sharing agreement.

Objective
As noted above, the objective of this training will be to provide training and instruction to members preparing to take the CCVE Exam, in addition to those who are wanting to further develop their assessment skills and knowledge. This training will help a broad range of members - furthering the professional assessment credentials in Canada.

The Selection Committee seeks to engage the services of a consultant - or a number of consultants - to develop the material used within these training sessions. Each training session developed should break down into training for each competency, should separately reflect best practices research, and utilize the Exam Core Competencies (outlined in Appendix A), to develop a propose a training plan.

Deliverables
The CAVEWAS Board will consider:
- Individual proposals for the development of training one core competency, and
- Individual proposals for the development of training for more than one core competency.
For each core competency, the total deliverables for this project will include, at minimum, the following:

- *Training Schedule*, outlining the schedule overview and activities;
- *Reference Material or Study Guide*, outlining the study material needed to complete the training;
- *Lesson Plans*, detailing the training breakdown and specific training and topics covered within the program;
- *Power Point Slides*, outlining topic and training content;
- *Worksheets/Sample Questions/Answer Guides*, for use of seminar participants; and
- *Research*, outlining the research and references utilized in the development of this material.

**Table 1: Anticipated Activities and Time Schedule**

<table>
<thead>
<tr>
<th>Phase</th>
<th>Anticipated Activity</th>
<th>Date/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP Closes</td>
<td></td>
<td>March 31, 2016</td>
</tr>
<tr>
<td>Phase 1:</td>
<td>Contract is awarded to the successful proponent</td>
<td>June 13, 2016</td>
</tr>
<tr>
<td>Phase 2:</td>
<td>Development of Training Schedule (DRAFT) and Individual Lesson Plans (DRAFT). Submission to the Selection Committee for review and feedback</td>
<td>TBD1</td>
</tr>
<tr>
<td>Phase 3:</td>
<td>Development of the Study Guide, Worksheets, Power Point Slides and Sample Question/Answer Guides – (DRAFT). Submission to the Selection Committee for review and feedback</td>
<td>TBD</td>
</tr>
<tr>
<td>Phase 4:</td>
<td>Completion and submission of all deliverables</td>
<td>December 1, 2016</td>
</tr>
<tr>
<td>Phase 5:</td>
<td>Delivery of training. Dates and location to be determined.</td>
<td>January – December 2017</td>
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</tbody>
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Proponents should use the schedule above as a guideline and incorporate their firm’s value-added approach and activities to the proposal. *Additional time and a later completion may be considered and will be subject to specific approval.*

**Governance**

The Selection Committee has been formed to provide guidance and validation throughout this project, and will provide feedback to the Consultant(s) at key milestones.

**Reporting**

The consultant will report to the Selection Committee throughout the project and will be expected to:

- Participate in feedback meetings where consultation or approval is required. It is anticipated that no more than one in-person meeting should be required.
- Provide deliverables as per contract to the Selection Committee.
- Remain accountable to the Selection Committee for each of the deliverables, and budget, while working to produce the final documents and training.
- Be responsive and keep regular communications with the project manager; and
- Submit deliverables and reports with sufficient lead time for comments and feedback where necessary.

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1 Specific Dates will be outlined once the number of proposals has been determined. Deadlines will be staggered depending on the number of proposals accepted and the anticipated presentation date for the training.
Budget
A budget for the project will be proposed by the consultant, in accordance with the proposed services. This cost estimate will be one of the criteria on which the overall proposal will be judged (see section 5 below).

Travel Requirements
Where travel is necessary for on-site meetings and delivery of the training, travel will be reimbursed in accordance with the Selection Committee’s travel expense guidelines. A rough estimate of travel time and expenses is expected to be included in the project’s budget.

4.0 SELECTION CRITERIA

Proposals should address the following broad categories that will be considered in the Selection Committee’s assessment of each proposal:

i. Proposed Services – 40%
Proponents are asked to submit:
   a) A description of the proponent’s proposed framework to meet the project scope including key activities, resource utilization, timelines, and any other relevant aspects; and,
   b) Identification of potential project challenges and proposed action to address these challenges, keeping in mind the expectations noted in section 3.

ii. Company Background – 10%
Proposals should include a description of the proponent including:
   a) The legal name;
   b) A brief description explaining how the proponent is best suited to perform the services outlined in section 3;
   c) Proposed project team with curricula vitae, identifying the project lead; and,
   d) Any partners or subcontractors expected to participate in the project.

iii. Experience – 30%
Proposals should be sure to include discussion of:
   a) The proponent’s knowledge and experience in the following areas:
      (i) Vocational Evaluation as it relates to the exam core competencies;
      (ii) Training skills required to practically implement this training to candidates;
      (iii) Experience working with projects requiring discretion and sensitivity;
   b) The proponent’s capacity and demonstrated experience to complete similar on-site training projects;
   c) The proponent’s experience with relevant projects and any other information regarding experience considered relevant;
   d) The value-added propositions the proponent offers;
   e) References from prior clients of similar activities; and,
   f) Discussion of any conflict of interest in general terms, should the proponent provide services to the Selection Committee.
iv. Cost Estimate – 20%
Submissions should include a description of the basis on which the proponent proposes to be paid. The Selection Committee prefers budget submissions with a cost estimate that includes:
   a) An hourly or daily fee structure for individual service providers;
   b) An estimate of the average monthly utilization (hours or days) of resources as it relates to activities and/or deliverables;
   c) The estimated average monthly cost to the Selection Committee, based upon the proponent’s estimate of the average monthly utilization of resources and the individual service providers’ daily rates; and,
   d) Itemized operational expenses, including travel, as anticipated (i.e. travel for delivery of training if applicable).

As noted in the Budget section above, the variable nature of the engagements makes it preferable that the Consultant submit a range or price per deliverable that can be used to evaluate the cost of services proposed relative to the scope. This does not exclude proponents from submitting fixed prices, capping monthly rates or submitting other financial alternatives.

5.0 ASSESSMENT OF PROPOSALS

Proposed Review Committee
Proposals will be reviewed by the Selection Committee, a sub committee of CAVEWAS. The Selection Committee will assess each proposal by taking into account the criteria outlined in section 5 (Selection Criteria) and project objectives. Prior to making a decision, the Selection Committee could request individual interviews with consultants. The Selection Committee reserves the right to utilize additional criteria and considerations by which they will assess the proposals to ensure that the project objectives are met.

<table>
<thead>
<tr>
<th>Activity</th>
<th>When</th>
</tr>
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<tbody>
<tr>
<td>RFP closes</td>
<td>March 31, 2016, 5 pm (EST)</td>
</tr>
<tr>
<td>Follow-up with short list proponents</td>
<td>March 31 – June 12, 2016</td>
</tr>
<tr>
<td>Contract awarded</td>
<td>June 13, 2016</td>
</tr>
<tr>
<td>Complete requested debriefs with proponents not selected</td>
<td>June 14-24, 2016</td>
</tr>
</tbody>
</table>
6.0 PROPOSAL CONDITIONS

In addition to Section 1 (“Notice to Proponents”), the following terms and conditions shall govern the proposal process:

a) The Selection Committee does not bind itself to accept or reject any proposal, for any reason whatsoever and the lowest cost proposal will not necessarily be accepted. The Selection Committee reserves the right to withdraw from, or cancel, the proposal process at any time.
b) Due to the commercial nature of the information requested, proposals will be kept confidential and shall not be divulged by the Selection Committee except to their legal, financial and other professional and technical advisors.
c) The documents appended to this request for proposal (if any) are provided solely to assist proponents in the preparation of proposals. The Selection Committee in no way warrants or guarantees the accuracy of the information contained in the appendices.
d) A proponent may utilize a subcontractor for a portion or portions of the services. A joint venture, partnership or subcontractor will only be considered if each party to the proposal provides appropriate background information as detailed in Section 5, ii, d) and is an active participant in the provision of services.
e) The Selection Committee reserves the right to reject a proposal if the proponent or its subsidiary, parent corporation, affiliate, associate, partner or subcontractor intends to or does provide services to another organization in competition with the Selection Committee. The Selection Committee reserves the right to determine whether a conflict of interest exists or may exist and the Selection Committee decision in this regard shall be final.
f) The Selection Committee reserves the right to reject any proposal which in their opinion:
   (i) does not evidence or reflect sufficient knowledge of the type or work involved;
   (ii) does not evidence the proponent’s ability to perform the work or services to the satisfaction of the Selection Committee, and is not, thereby, in the Selection Committee’s best interest.
g) In its assessment of proposals, the Selection Committee may also consider public information about the proponent that is readily available.
h) In its assessment, the Selection Committee reserves the right to obtain clarification of a submitted proposal from a proponent and to request changes in a proponent’s team.
i) An agreement must be negotiated and executed by the Selection Committee and the successful consultant before the services or work is awarded. Prior to negotiating the terms of the agreement and signing it, there is no recognized agreement between the two parties.
j) The Selection Committee reserves the right in its sole discretion to award all or part of the services or work to one or more consultants.
Appendix A: Core Competencies and Learning Domains

1. Foundation of Vocational Evaluation
   - Introduction to the History of Rehabilitation
   - Outline of Areas of Practice
   - The role of Vocational Evaluation (Scope)

2. Principles of Vocational Evaluation
   - Client evaluation – Setting the stage to ensure best results
   - Worksite evaluation
   - Behavioral observation
   - Vocational Evaluation Planning
   - Principles of Case Management
   - Career Options
   - Ethics

3. Test Selection
   - Orientation to testing and measurement
     - Research methodologies
     - Analysis
   - Use of standardized Measurements
   - Types of Test
   - Accommodation in Testing
   - Disabilities and Testing
   - Test Selection
     - Administration
     - Interpretation
     - Scoring
     - Reporting
   - Ethics

4. Transferable Skill And Employability Analysis
   - Function
   - Occupation Analysis
     - Methodologies
     - Understanding variables
     - Preparation and strategies
     - Tools and software programs
5. Occupational Information

- General overview of employment
  - Labour Market research
  - Trends in employment
  - Types of jobs, skills, standard

- Career Exploration
  - Occupational Resources
  - Classifications
  - Policies and benefit options

- Job Placement
  - Accommodations/modifications
  - Types of accommodations and modifications
  - Techniques in facilitation

6. Ethics

- Review the VRA Code of Ethics
- Ethical Reporting
- Ethical decision making
- Informed consent and release of data

7. Disability

- Types of disabilities
  - Medical aspects, functional, psychological, pharmacology,
  - Episodic disabilities
  - Rights and policies regarding disabilities

- Impact of disabilities within the workplace
- Resources, programs, devices
- Exceptionalities

8. Communication

- Case Management
- Interviewing, counseling, mediation
- Report development
- Presentation of findings
- Developing and communicating plans