

THE CHILDREN'S AID SOCIETY OF OTTAWA



REQUEST FOR Quote (RFQ)

Employee Assistance Program (EAP)

January 2015

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SUBJECT: Employee Assistance Program (EAP) – Request for Quote (RFQ)

The Children’s Aid Society of Ottawa (CASO), is seeking proposals for the provision of an EAP. This RFQ has been posted on The Children’s Aid Society of Ottawa website as well as on the Merx website.

1. CASO PROFILE

The Children’s Aid Society of Ottawa, (CASO) is a public sector employer with approximately 425 staff members. The mandate of the Society is to protect the children and youth in our community from all forms of abuse and neglect under the provisions of the Child and Family Services Act, (CFSA).

The Province of Ontario provides CASO’s principal funding. Under the provisions of the CFSA, the Ministry of Children and Youth Services of Ontario contracts with CASO as a transfer payment agency for the delivery of legislated Child Welfare Services in the Ottawa area. As a consequence of the contractual arrangement between CASO and the Ministry, the Ministry conducts regular reviews and audits to determine funding requirements and to exercise due diligence. Under Ontario law, the Society is also subject to audits performed by the Auditor General of Ontario.

CASO operates as a separate legal entity, at arm’s length from the Ministry and is governed by an independent volunteer Board of Directors. CASO’s Board of Directors is 16 members strong, and possesses the multi-disciplined representation necessary for effective governance. The Board meets regularly with Management.

The CASO complies with the following **Ontario Broader Public Sector (BPS) Code of Ethics** as stated in the Broader Public Sector Procurement Directive. Please refer to ‘Appendix A’ for further information.

2. PROPOSAL DOCUMENTS, DELIVERIES AND DEADLINES

If you are an interested vendor, please submit two hardcopies of your response to this RFQ, clearly identifying RFQ for the EAP for the CASO.

You are to submit two separate envelopes with one containing the proposal and one containing the pricing (see per section 10 Evaluation of Service and Price below).

The proposal and pricing documents are to be addressed to:

Joe Zadzora
Managed Care Consultant
Coughlin and Associates
466 Tremblay Road
Ottawa, Ontario K1G 3R1

Any question regarding this RFQ must be addressed by email to Joe Zadzora at Coughlin and Associates by February 9, 2015.

E-mail: JZADZORA@coughlin.ca

Responses to questions will be issued via email to all interested vendors.

After acknowledging and accepting the terms and conditions section that follows in this RFQ, please respond in accordance with the sequence of all other sections except for section 10 (*Evaluation of Service and Price*). You must clearly identify any specific requirements of the RFQ that you are unwilling or unable to provide. However, please note that this does not preclude vendors from proposing a different model of service option.

Your proposal to the RFQ is to be received at the address above no later than February 17, at 4:30 p.m. EST.

Proposals sent by fax or email will not be accepted. Late or incomplete proposals will not be considered.

The opening of responses from the vendors will not be public.

The selection committee will consist of members from CASO with support from Coughlin and Associates. The selection committee may request additional information or clarification from the vendors.

If required, finalists' may be requested to make presentations.

The following summarizes the timetable for this undertaking:

ACTION	DATE
Request for proposal (RFQ) release date	January 26, 2015
Deadline for submission of questions	February 09, 2015
Closing date and time for this RFQ	February 17, 2015 at 4:30 p.m. EST
Evaluation of responses	February 20, 2015
Finalists' presentations, if required	March 2 to 6, 2015
Advise vendors	March 11, 2015
New contract date	May 1, 2015 (subject to change)

The preceding times and dates are subject to change at the discretion of CASO.

CASO will conduct all administrative duties (i.e., billing; employee eligibility; liaison with EAP provider's account manager; etc) following the award of this contract. Once the new service agreement is in place, the EAP vendor will deal directly with:

Amy Robertson
Manager, Human Resources
1602 Telesat Court
Ottawa, ON K1B 1B1
Tel: 613-747-7800 Ext. 2821
E-mail: amy.robertson@casott.on.ca

3. TERMS AND CONDITIONS

The submission of a response to this RFQ constitutes that the vendor and its authorized staff have read, understood and accepted the proceeding terms and conditions as well as all other provision of this RFQ.

- Effective May 1, 2015, CASO will implement an EAP service agreement for an initial period of one year, with an optional two-year extension, at mutual consent.
 - In the absence of a new agreement beyond the contracted term, contract fees in subsequent years will be based on the previous year's usage.
 - The EAP service agreement shall be governed by, and construed in accordance with, the laws of the Province of Ontario.
 - As an interested EAP vendor, you are responsible for any cost you may incur to respond to this RFQ.
 - Unless otherwise indicated, your proposal shall remain valid for 180 days after expiration (on February 9, 2015 at 4:30 p.m. EST) of the period for tender.
 - CASO reserves the right to cancel the RFQ process, with no liability to either itself or to Coughlin.
 - With a written request to Amy Robertson at CASO, a proposal may be withdrawn by a vendor at any time prior to the previously referenced closing date and time.
 - All proposals are property of CASO and will be kept in strict confidence. Information provided to vendors is to be used for the sole purpose of responding to this RFQ and must also be kept in confidence.
 - With the exception of written questions to Joe Zadzora from interested vendors, or requests for additional information or clarification to vendors from Joe Zadzora
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on behalf of the selection committee, there is to be no other communication in relation to this RFQ from vendors with Coughlin and CASO.

- You confirm that the submitted proposal has been created and submitted without any connection, knowledge or comparison of figures or arrangements with any employees, agent or other person somehow related to CASO.
 - You will disclose if you are part of a consortium group within the Child Welfare sector. If you are part of the consortium please provide a bid based on the consortium rate and one based on CASO alone.
 - You will immediately disclose any and all potential, perceived and real conflicts of interest that may exist or be perceived to exist between your organization and CASO employees or agents. Please disclose if you have any employees who used to be former employees of CASO.
 - Where CASO discovers a vendor's failure to disclose all actual or potential conflicts of interest, CASO may disqualify the vendor or terminate the EAP contract awarded.
 - In the event that CASO determines that the successful vendor has made a material misrepresentation, CASO shall have the right to rescind the contract.
 - Potential vendors should warrant that any and all services provided under any contract that may arise from this RFQ will be provided in accordance with any and all applicable federal, provincial and municipal legislation, regulatory processes, codes and accepted standards for the provision of said services.
 - The vendor agrees to indemnify and save harmless CASO, from and against all claims, demands, loss, costs, damages, actions, suits or other proceedings by whomsoever made, brought or prosecuted, in any manner, based upon, occasioned by or attributable to the activities of the vendor under this Agreement. The obligation of the vendor to indemnify CASO, pursuant to the provisions of this clause shall survive any termination of this Agreement.
 - The vendor agrees to indemnify and hold CASO harmless from any and all claims for bodily injury, death or property damage as well as any associated costs, which result from any act or omission on the part of the vendor or its employees. The vendor further agrees to maintain professional liability insurance in a form acceptable to CASO, with a minimum excess policy limit two (2) million dollars. Proof of insurance must be provided to CASO in the form of a certificate of insurance naming the vendor, prior to the commencement of the contract.
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- You will not make any assignment of the EAP service agreement with CASO without prior written authorization from CASO.
- The lowest bid may not necessarily be accepted.
- You will be expected to implement and maintain all program components. Standards of service, courtesy, confidentiality and professionalism must be acceptable to CASO.
- Unless pre-authorized by CASO, it will not be responsible for any cost incurred for any specialized service by an accredited professional or agency to which an eligible person is referred by the EAP vendor.
- In the event of early termination of the service agreement by CASO, only the amount payable up to the date and time of termination will be paid to the successful bidder by CASO.
- CASO may terminate the EAP service agreement at any time upon three months' written notice to you.
- You may terminate the EAP service agreement at any time upon three months' written notice to CASO.
- In the event that you neglect or refuse to abide by the provisions of the contract or fail to observe them faithfully and completely, CASO reserves the right to terminate the service agreement. If this occurs prior to the end of the contract term referenced above, you will be required to reimburse CASO all reasonable expenses incurred for a tender of the EAP to the marketplace.

4. COMPANY DESCRIPTION

This section of your proposal is to include the history and background details about your company. Please provide specifics in the following order, using the appropriate identifying numbers:

- 4.1. A brief history of your company, along with the breadth and scope of services provided.
 - 4.2. Annual report or other documentation to support organizational stability.
 - 4.3. A profile of all company principals, as well as all key personnel that would be involved with the management of this account.
 - 4.4. The name of any association your company has joined and any accreditation it has attained. Indicate the year in which each occurred.
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5. OTHER PROVIDER INFORMATION

In the order presented and using the appropriate identifying numbers, please provide your response to the following:

- 5.1. Your company's policy on confidentiality.
- 5.2. The amount and type of insurance coverage held by your company, as well as the amount and type independently held by each of the practicing professionals that will service this account.
- 5.3. Your company's quality assurance process (i.e., type and frequency of audits performed; parties contacted for information; employee satisfaction surveys; etc).
- 5.4. The number of staff members (i.e., in-take workers, telephone counsellors, etc., excluding administrative and other overhead personnel) available to directly service CASO, its employees and their families. Please specify their locations.
- 5.5 The languages in which services can be provided to CASO employees and their eligible dependant family members, and the percentage of French and English counsellors available for all services. Please also indicate if you can provide services in any other languages.
- 5.6 CASO values the diversity of its workforce. Please indicate if you are able to provide culturally sensitive and specific services to employees and dependents from various ethno-cultural backgrounds.
- 5.7 Please provide an outline of your experience in the Child Welfare sector.
- 5.8 You are requested to provide three references from clients that have obtained similar goods or services in the last three years. For each of the references, please provide the company name, address, contact name, contact's telephone number, the date on which the work was undertaken and the nature of the assignment.

6. EAP SERVICE PARAMETERS

CASO has had an EAP for many years. The program is intended to help its employees and their eligible dependants with assistance for a wide range of personal and work-related concerns and problems such as stress management, marital and family difficulties, career concerns, substance abuse, depression, educational issues and elder/child care.

The Society's current EAP program provides a service in which each eligible individual receives their first 6 sessions yearly paid at 100% and 4 additional sessions paid at 75%. The Society also offers each family 12 sessions yearly at 100% and an additional 4 sessions at 75%.

The current EAP service provides counselling or referral services for the following issues; marital counselling, individual and family counselling, career counselling, stress/burn-out, aging parents, abuse, depression, parenting, substance abuse and educational issues. CASO is currently being billed monthly for hours used.

The Society is requesting vendors submit two (2) quotes: one based on CASO's current model of EAP service and, the other based on a *client-centred counselling uncapped session model*, which consists of face-to-face, telephonic, on-line/e-counselling and video counselling; (please see the guidelines indicated below).

In this section, confirm your ability to provide these services and, where applicable, how your firm will meet these deliverables.

- 6.1. *A 24-hour (7 days per week, 365 days per year) toll-free professional care and crisis line for assessment, counselling and consultation services.*
 - 6.2. *Confidential counselling for employees and their eligible dependant family members through a client-centered model. Counselling will consist of face-to-face, telephonic, on-line/e-counselling or video counselling. The vendor must have a multi-disciplinary service team consisting of professionals with a master's degree or doctorate in the fields of psychology, clinical social work, educational psychology, or other related mental health discipline with at least five years of clinical/counselling experience.*
 - 6.3. *Counsellors are to have, at minimum, a Master's degree in Clinical Psychology, Clinical Social Work, Counselling, and/or other relevant Psychology fields. Counsellors are to be fully licensed and insured. Counsellors are to hold and maintain registration with all applicable provincial and federal licensing associations. All counsellors must have at least two years of clinical/counselling experience.*
 - 6.4. *Bilingual Services, the EAP provider must be able to provide services in both of Canada's official languages. Please indicate how many French and English counsellors you have in the Ottawa area.*
 - 6.5. *For emergencies, appointments are to occur the same day as the intake call. For urgent cases, appointments are to occur within two working days and for non-urgent cases, within five days of receiving the call (in extenuating*
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circumstances an EAP provider may be asked to provide services in the employee's home, after 6pm on weekdays or on weekends).

- 6.6. *Provide a reliable network of easily accessible treatment centres and other community resources*, such as addiction centres, self-help groups, etc. You are asked to list those that will be used for this portfolio.
 - 6.7. *Welcome kits for all CASO employees in the event of the appointment of a new EAP provider.*
 - 6.8. *Orientation/program introduction sessions for all CASO employees at different sites in the event of the appointment of a new EAP provider.*
 - 6.9. *On-site wellness workshops for 425 employees.* During each contract year, there will be a total of 4 sessions.
 - 6.10. *Organizational health workshops.* During each contract year, there will be one (1) full-day or two (2) half-day workshops at the Society's office or other suitable location as determined by the Society. Each full-day represents seven hours.
 - 6.11. *Management training and consulting sessions.*
 - 6.12. *On-site critical incident response de-briefings, trauma response services on either an individual or group basis.* Each intervention will constitute one access and count as one case toward the entire group's annual utilization rate.
 - 6.13. *Statistical reports.*
 - 6.14. *Health and wellness promotion articles and other information documents* (i.e., brochures, wallet cards, general newsletters, bulletin announcements, monthly and quarterly wellness newsletters, wellness and health promotion activities, supervisor/managerial training manual, posters and internet access to vendor's web site).
 - 6.15. *Health and wellness resource packages* (in addition to counselling service, each package must be focused on a specific topic designed to address the questions and challenges of individuals who are looking for clinically-supported information on specific issues they face, but who don't necessarily want full-scale EAP counselling; the package should contain a mixture of multi-media resources shipped and packaged in a plain envelope to ensure confidentiality is maintained at all times).
 - 6.16. *Online wellness library* (i.e., online database providing articles, access to helpful websites, suggested reading and tools on work/life, personal and family
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issues including self-assessment tools and calculators, etc). Please confirm that access to this online area does not count toward plan utilization.

- 6.17. *Blackberry, Apple or Android-based accessible EAP application.*
 - 6.18. *Legal and financial counselling services.* For legal services, access for assessment and information will be to a qualified lawyer in the jurisdiction of the caller's residence. No legal counsel other than general advice is to be given. For financial counselling services, the consultation will be with a qualified financial advisor (i.e., CA, CGA) in the jurisdiction.
 - 6.19. *Follow-up and case management.* Monitoring a long-term care case that has been referred to an outside agency; follow-up with the employee after file closure; etc.)
 - 6.20. *Child care services.* Telephonic consultation that offers individual resources, information and referrals on issues such as parenting skills, locating schools, special needs programs, locating and arranging daycare, etc.
 - 6.21. *Elder care services.* Telephonic consultation offering information and referrals to the caller about issues such as arranging home support services for a parent, locating and arranging day programs, and so forth.
 - 6.22. *Homecare advisory service.* Provides contact information to access services for emergency and non-emergency elder care, child care, nursing and home-making service needs in the home (i.e., attendant care; palliative care; post-partum care; etc.)
 - 6.23. *Nutrition support services.* Registered dietitians are to offer individuals consultation and advice in areas of eating well, decreasing risk of disease, weight management and disease management.
 - 6.23. *Naturopathic service.* Naturopathic doctors to provide information about naturopathic medicine and how it works, including an assessment/educational segment, goal definition and progress review.
 - 6.24. If one of the aforementioned services is not a core component of your program, please identify it in this section, as well as in your response to the *Fee schedule* section (include cost) that follows.
 - 6.25. In addition to those cited above, you may have services that will enhance the EAP. Please identify and describe these in this section, with reference to costs in *Fee schedule* section that follows.
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7. REPORTS

The EAP utilization reports are to show the utilization rate, problem area(s) and occupational group(s). Reports will be provided to Amy Robertson at CASO.

Statistical reports presented to CASO will not include any identifying information about any individual, whether employee or eligible family member.

- 7.1. Please confirm that you will commit to meet with designated representatives from CASO on a quarterly basis to review, analyze and discuss the information from the EAP statistical reports and to make recommendations with a goal of ensuring that the program is optimally managed at all times.
- 7.2. Provide samples of all reports you are prepared to issue to CASO. Also, confirm the frequency at which these will be provided.
- 7.3. The vendor must specify its fee, if any, to provide ad hoc reports in the event they are required by CASO.

8. CONTRACT

- 8.1. During the course of the EAP contract, the selected EAP provider will enter into a formal agreement with CASO. Please furnish a sample of your service agreement (contract).
- 8.2. You must highlight all areas of your contract that either differ or are not identified within the provisions of this RFQ.

9. FEE SCHEDULE

By submitting a proposal, the vendor confirms that it has factored all terms, conditions and other provisions of this RFQ into its proposed rate and other costs indicated in this section.

Your confirmation includes awareness of the following provisions:

- Your quoted rate for the EAP is on a monthly per person basis. Net prices are quoted and HST is not included.
 - All fees are subject to the Harmonized Sales Tax (HST).
 - Any expense not covered in this schedule is to be agreed to in advance by CASO.
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- Any rate quoted by the vendor shall include all labour and materials, travel and carriage costs, insurance costs and all overhead, including but not limited to, any fee or other charge required by law.
- Any rate must be shown in Canadian funds.
- There will be no commission or any other fee paid to Coughlin and Associates from the successful EAP provider.
- CASO will pay invoices to the Canadian address of the successful bidder.
- While the awarded contract is in effect, CASO shall not accept price increases such as the fluctuation of the Canadian currency, cost-of-living, etc.
- All applicable taxes will be specified on invoices to CASO.
- Utilization of this EAP over the last few years has been as follows:

January 01, 2014 to December 31, 2014 = 293 hours of service
January 01, 2013 to December 31, 2013 = 270.5 hours of service
January 01, 2012 to December 31, 2012 = 302.5 hours of service

- Please also base your rate on a population of 425 CASO employees and the availability of the EAP to these employees and their eligible dependant family members.

9.1. The annual utilization rate will be defined as the number of new and re-activated clients who receive assessment and/or counselling for whom the EAP vendor has opened a case file during the aforementioned fiscal year, divided by the total eligible employee population for that year. Assessment and counselling is considered to have been delivered through face-to-face contact, by telephone or via internet-based counselling.

9.2. The vendor must confirm if it is prepared to absorb all costs related to the program utilization beyond a certain percentage of utilization per annum. If so, please detail.

9.3. CASO will consult, and negotiate if applicable, with you about pricing and plan parameters in the event of a population variation of at least 10% at CASO.

9.4. The vendor must also confirm that it is prepared to bill CASO on a quarterly basis.

10. EVALUATION OF SERVICE AND PRICE

The selection committee will determine which proposals comply with the requirements of this RFQ. Proposals that do not comply with the requirements may be disqualified.

The selection committee will evaluate the accepted proposals against certain *service* criteria. The following is a list of the criteria for each component:

- 1) *Local EAP services to CASO employees and their eligible family members* (i.e., ability to deliver all program components; counsellor locations; bilingualism; advertising; etc.)
- 2) *Experience in providing EAP services to other social service agencies.*
- 3) *Years of experience providing EAP services in the greater Ottawa/Gatineau region*
- 4) *Local EAP account management* (i.e., frequency of meetings with account manager; dealing with any service and billing issues; etc.)
- 5) *Reporting* (i.e., frequency; report format and trend insights that can be gained from them; availability of ad hoc reports; etc.)

Without prior knowledge to the CASO members of the selection committee, pricing will be evaluated at Coughlin on a relative pricing formula basis. Each proposal will receive a percentage of total possible points by dividing the bidder's price into the lowest bid price.

Coughlin will then compile a cumulative score for the service and pricing evaluation components that will be shared with the members of the selection committee.

Subject to satisfactory reference checks and the expressed and implied rights of CASO, the highest scoring proposal will be selected to enter into a formal EAP service agreement.

‘Appendix A’

Broader Public Sector Code of Ethics

Goal: To ensure an ethical, professional and accountable BPS supply chain.

Personal Integrity and Professionalism

Individuals involved with Supply Chain Activities must act, and be seen to act, with integrity and professionalism. Honesty, care and due diligence must be integral to all Supply Chain Activities within and between BPS organizations, suppliers and other stakeholders. Respect must be demonstrated for each other and for the environment. Confidential information must be safeguarded. Participants must not engage in any activity that may create, or appear to create, a conflict of interest, such as accepting gifts or favours, providing preferential treatment, or publicly endorsing suppliers or products.

Accountability and Transparency

Supply Chain Activities must be open and accountable. In particular, contracting and purchasing activities must be fair, transparent and conducted with a view to obtaining the best value for public money. All participants must ensure that public sector resources are used in a responsible, efficient and effective manner.

Compliance and Continuous Improvement

Individuals involved with purchasing or other Supply Chain Activities must comply with this Code of Ethics and the laws of Canada and Ontario. Individuals should continuously work to improve supply chain policies and procedures, to improve their supply chain knowledge and skill levels, and to share leading practices.
