

Statement of Work
InVEST Project Integrated Resource Team Facilitation
Invitation for Bid # 6100064633

I.-1. Statement of the Project. An Integrated Resource Team is a group of people who help disabled job seekers make progress along their career journey. The team may consist of family, caregivers, friends, case manager and other support professionals who come together to help these individuals' overcome challenges that impact career goals progress. The result of this collaboration is that the job seeker will earn a stable employment, sustainable wage and develop a long-term career. After a recognized need for additional qualified IRT Facilitators, funds have been allocated to increase the availability of IRT Facilitation Services. The IRT facilitator will be responsible for the coordination, delivery, continuation, and expansion of these services to Pennsylvanians who are enrolled in the InVEST Project, a federal model demonstration grant intended to transition individuals away from Subminimum Wage into Competitive Integrated Employment (SWTCIE). The Department of Labor and Industry (DLI) on behalf of Office of Vocational Rehabilitation (OVR) is issuing this Invitation for Bids (IFB) to procure IRT Facilitation services.

The term of the purchase order shall begin on the start date of a fully executed purchase order and end on September 30, 2027. No work may begin before the start date of the purchase order/

I.-2. Method of Award. The Commonwealth will award a purchase order by low cost to the responsible and responsive bidder who meets the eligibility requirements. This is a single award purchase order. Additionally, this solicitation is reserved for the DGS Certified Small Businesses. Only DGS Certified Small Businesses will be considered for award. Bidders will attach the DGS Small Business Certificate to their response. Bidders who are interested in participating in this program may find more information about the Small Business Contracting program and how to self-certify at www.dgs.pa.gov/bdisbo.

The vendor awarded the purchase order under this solicitation shall maintain their DGS Self Certified Small Business Certificate during the initial term of the contract and any renewal(s). Failure to maintain Small Business Certification may result in termination. The Commonwealth reserves the right to request DGS Small Business Certificates to verify renewal. Failure to maintain the Department of General Services Certification may result a performance issue entered into the Contractor Responsibility Program System (CRPS),

I.-3. IRT Facilitator Requirements. Job seekers interested in Project InVEST shall either apply directly to the OVR or be referred to OVR by a Community Rehab Provider (CRP). When an applicant needs technical assistance to acquire additional integrated resources an IRT Facilitator is engaged to establish and lead the team to collaboratively solve the challenges that that keeps the person from finding the job he or she desires.

The IRT Facilitator shall be a professional trained in the IRT Process by National Disability Institute and Charting the LifeCourse (CtLC) Framework & Tools by LifeCourse Nexxus at the University of Missouri- Kansas City.

The contractor shall assign IRT facilitators to provide the coordination and delivery of IRT facilitation services at minimum of 40 hours per week and a maximum of 80 hours per week for 100 distinct project participants per year. The number of participants is an estimate and may increase or decrease based on enrollment in Project InVEST.

The Contractor shall provide orientation for InVEST Project participants, families, and IRT members on the IRT Process, CtLC Framework & Tools, and the shared case management platform.

The contractor shall provide a monthly report and supporting expense documentation will accompany all invoices submitted to the InVEST Project Manager. The monthly report will at minimum include:

- a. The names of individuals referred for IRT Intakes during the month.
- b. The names of individuals who have completed an IRT Action Plan during the month.
- c. The names of the IRT Facilitators serving InVEST Project Participants during the month.

The Contractor shall ensure all documents are uploaded and accessible in a shared case management platform. Summaries shall be communicated consistently with the OVR Case Counselor designated by the OVR and shall include

- a. CtLC One Page Description
- b. CtLC Trajectory
- c. CtLC Integrated Support Star
- d. Resource Gap Analysis
- e. IRT Action Plan

I.-4. Pricing. Bidders must submit their offer in the Supplier Relationship Management (SRM) System. The bid price shall be an all-inclusive hourly rate to include materials, equipment, labor, reporting and any other required costs necessary to complete work as outlined. In addition, the OVR shall reimburse the vendor for participant specific accommodations.

The IRT Facilitator shall coordinate the following components of the IRT Process using the CtLC model and supporting tools:

A. IRT Facilitation.

1. Intake Meeting- The intake meeting to establish an IRT to support the individual in his or her career journey. Prior to the intake meeting, the IRT Facilitator shall develop an agenda with is list of topics to be discussed during this meeting. During this meeting the IRT Facilitator shall develop action and communication plans and discuss the IRT members' role for success.

2. Career Exploration and trajectory– Discuss employment history, assessments, identify career goals employment supports needed in collaboration with Offices of Vocational Rehabilitation (OVR) and Developmental Programs (ODP).
3. Needs assessment using the Integrated Support Star-an individualized person-centered approach tool to capture the employment supports and assistive technology Project InVest applicants and participants require to become employed.
4. Active Resource Coordinator using CtLC Tool, ongoing communication and activities and meetings with the IRT.

B. Travel

Reimbursable travel to perform the work shall be paid in accordance with the [Commonwealth Travel Policy](#) Management Directive 230.10.

I.-7. Invoicing. The Contractor shall provide itemized receipts as invoice back-up for any expenses incurred and deemed reimbursable by the InVEST Project.

A courtesy copy of the monthly invoice should be sent to InVEST Project Manager for review and sign-off. Once reviewed, a monthly invoice submission with back-up is to be sent to Aimee McKain at aimmckain@pa.gov.

Only one (1) invoice per email is permitted. The following information must be included with invoices for payment:

- A. The monthly report will at minimum include:
 - a. The names of individuals referred for IRT Meet & Greets during the month.
 - b. The names of individuals who have completed an IRT Action Plan during the month.
 - c. The names of the IRT Facilitators serving InVEST Project Participants during the month.
- B. The Contractor may be reimbursed for travel expenses in accordance with Management Directive 230.10 ([Policies & Procedures \(pa.gov\)](#)) to fulfill IRT Facilitation services with validating receipts and/or travel log (**Attachment D**). The travel log to be completed will be provided by the InVEST Project Team.
- C. The Contractor may invoice for travel in accordance with the Commonwealth's Travel policy, 230.10 - [Commonwealth Travel Policy \(pa.gov\)](#). Proof of travel expenses must be provided with the invoice to support the billable cost, i.e., travel logs, parking receipts, toll receipts or other documents to validate the expense incurred associated with providing SSP services. Mileage to the service location will be reimbursable.

(Note* IRT Facilitation hours are only reimbursable when providing IRT Facilitation services, travel to and from the assignment is not billable.)

I.8. Confidentiality. Contractor must treat all InVEST Project participant information as confidential and it must not be divulged or made known to any person in any manner outside of the project.

I.9. Commonwealth Holiday Schedule. Commonwealth recognized or observed holidays:

- New Year's Day
- Dr. Martin Luther King, Jr. Day
- Presidents' Day
- Memorial Day
- Juneteenth
- Independence Day
- Labor Day
- Columbus Day
- Veterans Day
- Thanksgiving Day
- Day After Thanksgiving
- Christmas Day

I.10. Post Award Administration. The selected Supplier's performance shall be monitored and evaluated in accordance with the requirements outlined in the Contract and the timeliness and coordination of services. At a minimum, the selected Supplier's performance shall be evaluated on an annual basis. Suppliers may be required to attend Contract Performance Review meetings. These meetings will be for the purpose of providing Supplier performance reviews, discussion of issues either party may have concerning the Contract or to evaluate the overall progress of the Contract. The meetings will be held quarterly, semiannually, or annually at the discretion of the DLI, OVR.