

OPPORTUNITIES FUND FOR PERSONS WITH DISABILITIES

TERMS AND CONDITIONS FOR CONTRIBUTIONS

A separate set of Terms and Conditions were not completed per Appendix I of the Directive on Transfer Payments as the requirements under Appendix I are met through this set of Terms and Conditions.

1. LEGISLATIVE AUTHORITY

The Opportunities Fund (OF) is delivered under the authority of Section 7 of the *Department of Human Resources and Skills Development Act* which provides that the Minister may, in exercising the powers and performing the duties and functions assigned by the *Human Resources and Skills Development Act*, establish and implement programs designed to support projects or other activities that contribute to the development of human resources of Canada and the skills of Canadians, and the Minister may make grants and contributions in support of the programs.

2. PROGRAM DESCRIPTION

The Opportunities Fund was launched in 1997 by the former Department of Human Resources Canada (HRDC) in response to an identified gap in labour market programming for people with disabilities. Funding provided through the Opportunities Fund supports a broad range of activities including those that are similar in nature to Employment Insurance Part II programming (e.g., wage subsidies, work experience partnerships, skills development and self-employment assistance), as well as activities aimed at addressing the specific circumstances of people with disabilities (e.g. workplace accommodation costs and the provision of adaptive equipment and personal supports). The operating principle states that, where clients are eligible for other programming, OF will function as an alternative measure for cases where there is no comparable intervention easily accessible for the client, in terms location or interventions available that are needed for a specific client to prepare for, find or maintain employment.

3. OBJECTIVES

The objective of the Opportunities Fund for Persons with Disabilities is to assist persons with disabilities in preparing for, obtaining and keeping employment or becoming self-employed, thereby increasing their economic participation and independence. The objective supports the Government of Canada's overarching goals of promoting skills development, labour market participation and inclusiveness as well as ensuring labour market efficiency.

The objective will be achieved by working in partnership with non-profit organizations, businesses and provincial/territorial governments in using innovative approaches that demonstrate best practices to promoting the economic integration of people with disabilities. Working in partnership and building on each other's strengths and capacity will build a stronger and more competitive Canada to support Canadians in making choices that help

them live productive and rewarding lives, as well as improve their quality of life. It will provide people with disabilities with the flexibility and the opportunity required to reach their full potential and participate to their fullest in a competitive and productive economy.

4. RESULTS AND OUTCOMES

Program results are obtained through the collection of administrative data from the regions and eligible recipients. This data is used to support improved program performance and to guide future changes to policy, program development and design.

As part of the federal accountability for program expenditures, an updated integrated Results-Based Management and Accountability Framework (RMAF) and Risk-based Audit Framework (RBAF) has been developed for the OF program and contains measurable results. The framework contains a concise logic model and an overview of the performance measurement strategy, including the performance data (performance indicators) to be tracked. Also included are a Risk Assessment and Management Summary, descriptions of program monitoring and recipient auditing, and Evaluation and Reporting Strategies.

Based on the objectives and activities of the OF program, the following outcomes have been identified:

- *Direct outcomes:* (duration of completion varies greatly from individual to individual);
 - People with Disabilities are participating in skills enhancement activities;
 - People with Disabilities have tools, skills and information to obtain employment;
 - People with Disabilities are employed or self-employed; and
 - Employers, stakeholders and People with Disabilities are aware of OF.

- *Intermediate Outcomes:*
 - People with Disabilities are financially self-reliant;
 - People with Disabilities have entered labour market to their fullest potential;
 - People with Disabilities are accessing Employment Opportunities; and
 - Employment Opportunities are available to People with Disabilities.

- *Ultimate Outcome:* (duration of completion varies greatly from individual to individual);
and
 - People with Disabilities are integrated into labour market.

- *Strategic Outcome:*
 - The initiative would lead to a skilled, adaptable and inclusive labour force and efficient labour market by providing people with disabilities opportunities to participate in employment.

5. INTERPRETATION

In these Terms and Conditions,

“Minister” means the Minister of Human Resources and Skills Development Canada.

“Contribution funds” means a conditional transfer payment for a specified purpose which is subject to being accounted for and audited.

“Eligible activity” means an activity described in Section 6 of these Terms and Conditions.

“Program” means groups of related activities as described in the Estimates.

“Project” means an eligible activity undertaken by a project sponsor.

“Project sponsor” is a general term used to identify a group of eligible recipients as outlined in section 10 a, b and c of these Terms and Conditions.

“Individual” is an individual who undertakes a project as a project sponsor.

“Community Coordinator” means a contribution recipient who receives contribution funds to carry out a project under the Targeted Wage Subsidies, Self-Employment or Skills Development Employment Benefit. The Community Coordinator will then enter into its own agreement with eligible insured participants, project sponsors or employers in support of activities, which will further the objectives of the employment benefit in question.

“Recipient” means all recipients outlined in section 10 of these Terms and Conditions.

“Ultimate recipient” means an entity that receives funding directly from a Community Coordinator.

“Employment Benefit” refers to the Employment Benefits under Part II of the *Employment Insurance (EI) Act* outlined in Section 3.2) of the Employment Benefits and Support Measures Terms and Conditions.

“Participant” means a person with a disability who is unemployed, legally entitled to work in Canada, requires assistance to prepare for or obtain employment or become self-employed and refers to those individuals who are recruited to a project or who undertake an eligible activity on their own as outlined Section 6 of these Terms and Conditions. Program officials will take into account the range of programs for which persons may be eligible when determining whether OF is the appropriate vehicle for assisting those persons. Such programs include the Labour Market Agreements for Persons with Disabilities, the Employment Benefits and Support Measures under Part II of the *EI Act* and similar programs that are the subject of agreements with provinces, territories or organizations entered into pursuant to section 63 of the *EI Act*. The verification for EI-eligibility must continue to be documented on the client's file. The decision to assist an EI-eligible client under OF must be made by a designated Social Development Canada and/or Human Resources Skills Development Canada official, and a note to file explaining the circumstances and rationale for the decision will be required;

“Insured participant” is an unemployed person who, at the time of requesting assistance under an Employment Benefit is:

- a. an active EI claimant, or
- b. a former EI claimant whose benefit period under the EI Act has ended within the previous 36 months, or
- c. a former EI claimant for whom a benefit period has been established in the previous 60 months and who
 - i. was paid special benefits under the EI Act during the benefit period;
 - ii. subsequently withdrew from active participation in the labour force to care for one or more of their new-born children or one or more children placed with for the purpose of adoption; and
 - iii. is seeking to re-enter the labour force.

“Person with a Disability” means a person who self-identifies as having a permanent physical or mental impairment that restricts his or her ability to perform daily activities.

6. ELIGIBLE ACTIVITIES

The activities that may be supported under OF include:

- a) Providing financial support to employers to encourage them to hire persons with disabilities whom they would not normally hire;
- b) Providing financial incentives to persons with disabilities to encourage them to accept employment;
- c) Supporting projects to help persons with disabilities create jobs for themselves by starting a business;
- d) Supporting projects that provide persons with disabilities with opportunities through which they can gain work experience which will lead to on-going employment;
- e) Providing financial assistance to persons with disabilities to help them obtain skills for employment, ranging from basic to advanced skills;
- f) Providing financial assistance to persons with disabilities to help them access employment or employment services;
- g) Providing financial assistance to support special services and interventions tailored to meet the needs of persons with disabilities in order to facilitate their integration into employment;
- h) Providing financial assistance to increase awareness of the needs of persons with disabilities by building employer and service provider awareness activities into projects; and
- i) Providing financial assistance to support such other activities that, in the opinion of the Minister, promote the objective of the program.

No financial assistance in support of activities outlined in (e) which assist persons with disabilities to obtain skills for employment may be provided without the agreement of the

government of the province or territory in which the activity will take place.

7. GUIDELINES

Activities will be carried out in accordance with the following guidelines:

- a) Harmonization with federal and provincial employment initiatives to ensure that there is no unnecessary overlap or duplication;
- b) Cooperation and partnership with other governments, community-based disability organizations, other interested non-profit organizations and businesses;
- c) Reduction of dependence on income maintenance or support payments by helping people with disabilities obtain or keep employment;
- d) Flexibility to allow for activities that are responsive to the needs of persons with disabilities;
- e) Implementation of OF within a framework for evaluating its success in assisting people with disabilities to obtain or keep employment;
- f) Commitment by persons receiving assistance under OF to:
 - i) achieving the goals of the assistance,
 - ii) taking responsibility for identifying their employment needs, and
 - iii) if appropriate, sharing the cost of the assistance; and
- g) Ensuring that people with disabilities can obtain access to assistance in either of Canada's official languages where there is a significant demand for access in that official language.

8. OFFICIAL LANGUAGES ACT

All HRSDC branches with official languages responsibilities have been consulted and it has been determined that all necessary measures are in place to ensure that HRSDC meets its obligations with respect to the Official Languages Act.

OF respects the undertaking and obligation of the Government of Canada set out in Part VII of the Official Languages Act by ensuring that unemployed people with disabilities, who are members of either official language community, can participate in and obtain access to assistance under the program in their official language where there is a significant demand for access in that official language.

Bilingual services to people with disabilities will continue to be provided by HRSDC/Service Canada staff; general information about the program, and any notice, advertisement or other matter relating to the project are available in both official languages; application forms for the various program options are available in both official languages on the HRSDC public website; both national and regional Call for Proposals are posted and advertised (if applicable) in both official languages; and the assessment grid for regionally/locally delivered projects requests applicants must demonstrate that services will be provided in both official languages where appropriate.

9. TYPE OF FINANCIAL ASSISTANCE

Financial assistance in support of eligible activities may be provided to eligible recipients in the form of contributions.

10. ELIGIBLE RECIPIENTS

Eligible Recipients are:

- a) Businesses, including federal crown corporations found on Schedule III, Part II of the *Financial Administration Act* (funding may not be a substitute for ongoing operating or capital funding requirements), comparable provincial crown corporations, and those who may act as a community coordinator (CC);
- b) Organizations, including non-profit organizations, public health and educational institutions, band/tribal councils, municipal governments, and those who may act as a CC;
- c) Individuals, including those who may act as a CC; and
- d) Participants.

Provincial/territorial government departments and agencies are not eligible recipients unless approved by the Minister. They are very exceptional recipients. As a result, a separate set of Terms and Conditions were not completed per Appendix I as the requirements under Appendix I are covered off by this set of Terms and Conditions.

11. REPAYMENT OF CONTRIBUTIONS

Contributions to eligible recipients are not intended to allow for the generation of profits or to increase the value of the business, organization, etc. and therefore are not repayable.

12. STACKING LIMITS

Where possible and appropriate, the costs of an eligible activity will be shared with the recipient and/or with government and/or the private sector. However, where the sharing of costs with the recipient and private sector are not feasible, Total Government Assistance (federal, provincial or municipal) may total 100% of eligible costs.

The department shall ensure that the amount of the contribution it makes is appropriate where a contribution in support of the costs of the eligible activity from more than one program in the department, from more than one federal department or more than one level of government or from the private sector, is anticipated.

Prior to approving a contribution in excess of \$100,000, the department shall obtain from the recipient a statement or declaration about other sources of funding (government and private sector) for the eligible activity and shall require the recipient to report any additional assistance received after that time.

In the event that Total Government Assistance, as defined in the *Treasury Board Policy on Transfer Payments*, received by a Recipient in respect of an eligible activity exceeds the amounts of such assistance declared, the department has the right to reduce its contribution by the amount of any additional assistance that is to be received, or to require repayment of an amount equal to the amount of such assistance if the department's contribution has already been paid.

13. APPLICATION/PROPOSAL REQUIREMENTS

Proposals/applications for assistance from eligible recipients to carry out eligible project activities must include the following:

- a) The name of the program under which the applicant is applying;
- b) The name of the applicant;
- c) The legal name of applicant (if different);
- d) The mailing address/city/province/postal code;
- e) The telephone and facsimile numbers;
- f) The location of activity (if different from mailing address or applicant);
- g) The electronic mailing address;
- h) The contact person name and telephone number;
- i) Business/organization information including type, number of employees, Business Number, Incorporation number and Goods and Services Tax/Harmonized Sales Tax number;
- j) The organization's legal status including legal signing officers and combination of signatures required for agreements, cheques and payment claim submitted to HRSDC;
- k) Details of organization's accounting practices;
- l) Details of organization's insurance coverage;
- m) The duration of activities covered by the proposal;
- n) Project objectives;
- o) An outline of the activities to be performed and the timelines;
- p) A description of the targeted participants or beneficiaries (if applicable);
- q) List of partner organizations, their roles and responsibilities and financial contributions (monetary or in-kind), specifying whether these contributions have been confirmed at the time of submission of the application;
- r) Expected results;
- s) Means by which success will be measured;
- t) Applicant's background, mandate and expertise;
- u) Past projects with HRSDC and their achievements;
- v) Environmental impact of proposed activities (if any);
- w) Budget template form provided by the department;
- x) Identification of all other sources of funding for the project, including those from other government programs and non-government sources; and
- y) Declaration of amounts owing in Default to the Government of Canada (if amount request is \$25,000 or more).

All proposals and applications for assistance under the Opportunities Fund for Persons with

Disabilities must provide assurances that:

- a) No lobbyists were utilized or, if they were utilized, that it was done in accordance with the Lobbying Act;
- b) No individual for whom the post-employment provisions of the Values and Ethics Code for the Public Service apply, shall derive a direct benefit from this agreement unless that individual is in compliance with the applicable post-employment provisions and consistent with the Conflict of Interest Act obligations;
- c) No member of the House of Commons shall be admitted to any share or part of this agreement or to any benefit arising there from; and
- d) Disclose the involvement of former public servants who are under the Values and Ethics Code for the Public Service.

To ensure staff will have the abilities to adequately assess these criteria by connecting to program objectives, performance measurement strategy, budget, community plans, etc. HRSDC provides standard Project Officer training for staff which includes the planning, development, assessment and recommendation phases of the Project Life Cycle (PLC). Staff is provided with the knowledge and skills and tools such as guidelines, checklists, and assessment grids to score based on approved criteria. Each proposal must be assessed by either an individual local, regional or national review committee according to dollar value of the proposal.

14. AGREEMENTS

Each approved proposal for assistance will be the subject of a formal agreement specifying the responsibilities of each party, the items for which expenditures are anticipated, the conditions under which payments will be made and mutually agreed upon measures designed to assess the success of the activity in attaining its objective. Agreements will also include the terms and conditions under which a community coordinator may further distribute funds to an ultimate recipient.

The requirements for contribution agreements will comply with Appendix G of the Treasury Board *Directive on Transfer Payments*.

15. ELIGIBLE COSTS

- a) Contributions may be made to participants to cover the costs incurred in relation to their participation in eligible activities such as:
 - (i) All or a portion of their living expenses;
 - (ii) All or a portion of the incremental costs of participation such as expenses relating to specialized services, arrangements or equipment, dependant care, and disability accommodation; and
 - (iii) All or part of the cost of tuition for a course or program of instruction.

Contributions may be made to all other eligible recipients, including community coordinators who redistribute funds to ultimate recipients, in respect of the following costs of eligible

activities:

- (i) Employment costs including participant wages and related employer costs;
- (ii) Overhead costs related to planning, organizing, operating, delivering and evaluating approved activities, including costs such as wages and employment related costs for staff, licences, permits, fees for professional services, disbursements for research or technical studies, costs related to research subjects, specialized services, arrangements or equipment for persons with disabilities, bank interest, utilities, materials, supplies, travel, insurance, rental of premises, leasing or purchase of equipment, costs of audits, evaluations and assessments, and costs of the central administrative functions of the employer/coordinator's operations that are drawn upon to support agreement activities;
- (iii) Costs associated with the workers' compensation actual costs or assessment paid directly to the provincial/territorial workers' compensation authority on their behalf for participants or administrative staff;
- (iv) All or a portion of the living expenses and tuition expenses of participants, and expenses related to providing specialized services, arrangements or equipment, dependant care, transportation and accommodation for participants; and
- (v) Where the community coordinator (CC) further distributes the funding to ultimate recipients that propose to carry out eligible activities, reasonable and proper administration costs incurred by the CC in administering the distribution of the contribution and monitoring and coordinating the implementation of eligible activities being carried out by the ultimate recipients.

Capital costs for the construction of a building (other than repairs or renovations to support the participation of persons with disabilities) or the purchase of land or buildings are not eligible costs.

16. MAXIMUM AMOUNT PAYABLE AND DURATION

The maximum amount payable per eligible recipient under section 10 a, b and c is \$15,000,000 over 3 years. The amount of the contribution will be determined by the number of those who are participants or are to be served.

The maximum amount payable per participant under section 10d is \$90,000 per year, according to individual needs.

Any one contribution agreement cannot exceed 3 years. Subsequent renewals will be made on the basis of performance and results achieved.

17. CANCELLATION OR REDUCTION OF TRANSFER PAYMENTS

Program literature and agreements will include provisions for cancellation or a reduction in the amount of financial assistance specified in the event Parliament reduces the level of funding for OF.

18. MULTI-YEAR FUNDING

HRSDC intends to enter into multi-year agreements with recipients of up to three years where activities are multi-year in nature. Multi-year funding will allow for more efficient and well managed projects and eliminate the administrative burdens and uncertainty imposed upon recipients. All multi-year agreements are subject to continuing good performance of the recipient. Good performance requires that all substantial financial and activity monitoring recommendations are implemented, that there is no risk of major financial loss and that there are no probationary requirements that the project was subject to that have not been met.

19. METHOD TO DETERMINE AMOUNT ELIGIBLE TO RECEIVE

The financial assessment of proposals is completed by experienced and trained staff and includes representatives from Finance to ensure staff makes an informed assessment of the proposed budget. To ensure staff has the abilities to adequately assess the financial aspect of proposals, HRSDC provides standard Project Officer Training on Budget Development and Assessment related to Grants and Contributions programs. This course provides detailed information about cost categories and eligible expenses and other such topics as assessment of relevance of expenditures to program activities and use of benchmarks to assess fair market prices. The training provides practice opportunities to Program Officers which enables them to transfer the knowledge and skills to the workplace. Staff also has access to such tools as guidelines, templates and financial assessment grids to assist in the financial assessment process.

20. PAYMENTS

Each approved request for funding to carry out an eligible activity will be subject to a formal agreement specifying the conditions under which payments will be made and the obligations of the department and the recipient. Payments to all recipients are made in accordance with the cash management provisions of *Treasury Board's Directive on Transfer Payments*, Section 6.4. When total contribution funding paid to a recipient exceeds the eligible expenditures incurred by the recipient to carry out the initiative or project, any amounts recoverable from the recipient are debts due to the Crown and must be repaid to Canada.

Contributions may be paid as follows:

- a) Direct payments to participants may normally be made on a bi-weekly basis. Payments to cover such costs as tuition and expenses relating to specialized services, arrangements or equipment for persons with disabilities may be made on a lump-sum basis, when needed, based on an estimate from the provider, followed by proof of purchase upon request.
- b) All contribution payments to other eligible recipients may be made as follows:
 - i) Monthly, quarterly or annual progress payments may be made based on expenditure claims and a final payment of any sums due following receipt of the final claim and, if considered necessary by HRSDC, following completion of a

financial audit.

- ii) Advance payments may be made in accordance with *Treasury Board's Directive on Transfer Payments*. The funding agreement will specify how advance payments will be made and will be based on the recipient's cash flow requirements for each fiscal year. First and second month advances are paid as per cashflow forecast. Payment of the third and each subsequent advance are made conditional upon receipt of duly completed claim forms within the advance period accompanied by supporting documents of actual expenditures incurred and paid during the period and updated activity reports for the period. The frequency and amounts of advance payments will be based on risks involved, loss of interest of money paid in advance and costs to the government and recipient of administering advance payments. Advance payments of up to 100% may be made to individuals to cover such costs as tuition, other institutional costs and disability needs. Financial assistance for tuition and other institutional costs will respect the payment policy of the training institution the client is attending and may therefore be paid on a lump sum basis in advance of participation. Advance payments may also be necessary for disability related supports and may be paid on a lump sum basis in advance of participation, as required by the provider.
- iii) Normally, up to 10% of the overall value of the contribution agreement may be withheld until after the recipient's compliance with the agreement has been confirmed, and a final calculation of payment has been made. Final payment will be made following:
 - receipt and verification of a final claim for the balance due accompanied by an itemized statement of all eligible costs incurred and paid by the Recipient, and;
 - Receipt of any auditor's report or other report that may be required to be submitted by the Recipient under the terms of the Agreement.

A rationale for any variance from this 10% holdback must be provided and documented on file.

All claims for interim and final payments will require an accounting of the use of funds and results achieved.

The final approval of proposals may be delegated by the Minister to appropriate officials as per HRSDC's delegation instruments. The Minister may establish advisory and/or consultative mechanisms to assist in the process.

21. AUTHORITY TO SIGN AND AMEND AGREEMENTS

Authority to sign and subsequently amend agreements may be delegated by the Minister as per HRSDC's delegation instruments.

22. AUTHORITY TO APPROVE PAYMENTS

Authority to approve payments by certifying compliance with the terms of the agreement may be delegated by the Minister as per HRSDC's delegation instruments.

23. DISPOSAL OF CAPITAL ASSETS

The contribution agreement shall provide that any capital asset costing \$1000 or more and purchased with contribution funds which has not been physically incorporated into the project premises shall be disposed of in a manner determined by HRSDC. The governing considerations are to encourage the continued use of the assets in support of the employability needs of individuals and to ensure that assets are not redirected for HRSDC's own use.

24. INTELLECTUAL PROPERTY

Intellectual Property created by a recipient of a transfer payment remains the property of the recipient. Where applicable, HRSDC will insert clauses in its agreements to ensure HRSDC is entitled to use or be permitted the use of the intellectual property for any governmental purpose. Examples of intellectual properties could be toolkits to help employers integrate persons with specific disabilities into their workplace, awareness packages to help an employer's employees understand the requirements and duty to accommodate persons with disabilities in the workplace.

25. AUDIT

Each agreement will specify that the Government of Canada retains the right to audit the records of the recipients of contributions and, if it is determined that the amount paid exceeds the amount payable, the difference is considered as a debt to the Crown.

26. ACCOUNTABILITY AND EVALUATION

Eligible Recipients

Recipients under a contribution funding agreement must meet the department's financial and performance reporting requirements, as specified in the agreement. The content of each report must

- account for the use of the funding and provide adequate support for payments;
- demonstrate whether program objectives have been met; and
- Support the department's accountability and performance measurement requirements.

Financial performance requirements allows that payments be made by HRSDC to the recipient for eligible costs to carry out eligible activities, within maximum amount payable and within duration of the agreement. All expenses claimed must be actual costs incurred or as per cashflow forecast and must be relevant to project activity and achievement of the objectives and milestones of the project. Payment claim forms must be supported by an activity report and an itemized statement of all eligible costs incurred and paid by the

recipient or in the case of advance payments, an updated cashflow.

Future payments should be allotted if the project is meeting its objectives, costs incurred are relevant to activities and are fair market value for goods / services received and all required supporting documents are provided in support of expenditures. If deemed necessary, final payment may include an audit conducted by HRSDC of the recipient's books and records to verify the amount of the costs of the project and the costs for which the recipient has claimed payment under the agreement.

The following four "performance measurement indicators" that recipients must track have been identified for OF:

- Number of clients served;
- Number of clients employed;
- Number of clients who have returned to school; and
- Number of clients who have enhanced employability.

Three "Outputs" generated directly by the program activities, have been identified for OF:

- The number of *agreements* with stakeholders, employers and people with disabilities;
- The number of *return to work action plans* that have been developed and completed; and
- The *promotional material* to raise the awareness of the program to employers, stakeholders and people with disabilities.

Results on outcomes will be accounted for during the life cycle of the program. The key short-term and intermediate outcomes and related outputs will be reported internally on a monthly and quarterly basis by the program based on extracts from the operational administrative database. Key program information and participant data will be reported to Parliament through the annual Departmental Performance Report (DPR).

Based on the objectives of the program, the outcomes are considered key. Other performance indicators will be reported internally on a monthly basis for program management purposes.

The audit report will be made available to the public in both official languages with minimal formality while respecting the spirit and intent of the Access to Information and Privacy Acts.

Participants

Participants under a Contribution Agreement must also meet the financial and activity requirements, as specified in their contribution agreement.

Financial performance requirements allows that payments be made by HRSDC directly to the participants for eligible costs incurred as a result of undertaking their return-to-work action plan within maximum amount payable and within duration of the agreement. Payments may be made on a bi-weekly basis or in a lump sum. Payment claim forms must be supported by invoices of actual eligible costs incurred by the recipient.

Financial and activity monitoring is undertaken as determined by the operational guidelines

for each program and the contribution agreement. Performance measurement indicators and outputs for participants are the same as for other recipients, where applicable.

Future payments should be allotted if the participant is meeting objectives, costs incurred are relevant to the return-to-work action plan activities and all required supporting documents are provided in support of expenditures.

A Summative Evaluation was completed May 2008 as one of the conditions for the continuation of the OF program.

The Summative Evaluation assessed the impacts and effects of the Opportunities Fund for Persons with Disabilities in area of employability enhancement, employment and income. It also examined a range of other issues including program rationale, implementation and objective achievement, client profile and satisfaction, and cost-effectiveness. The evaluation also included a review of the appropriateness of accountability commitments made in the 2003 RMAF and the feasibility of collecting performance measures on an ongoing basis.

While the results of the evaluation were mainly positive, some areas for improvement/consideration are identified. These areas will guide the scope and focus of the evaluation strategy for the next phase of the program.

27. PLANNED EVALUATION STRATEGY

HRSDC will implement the following Evaluation Strategy for the next phase of the OF program. It will consist of two phases:

- a) Phase one from 2008 - 2009:
 - Will include an Update Report focusing on suggested improvements identified in the Summative Evaluation and highlighted in the management response.
- b) Phase two from 2009 - 2014:
 - Will include a Targeted Evaluation of OF focusing on program improvement, client impact and cost-effectiveness. The framework and methodology development will be completed in 2009 -2010; monitoring of data development and performance management indicators will take place in 2010 to 2012; and the targeted evaluation will take place 2012 to 2014.

Annual funding of \$193,000 to conduct this evaluation is accounted for in the A-based budget.

28. DURATION OF TERMS AND CONDITIONS

These Terms and Conditions will apply, and payments may be made with respect to the period continuing from March 31, 2009. The OF program will be reviewed on the basis of program effectiveness and relevance of the program in the labour market.