



POUDRE SCHOOL DISTRICT R-1

REQUEST FOR PROPOSAL

EMPLOYEE WELLNESS PORTAL

RFP #19-69N-001

PROPOSAL SCHEDULE

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| RFP Issued to BidNet | April 9, 2019 |
| Firm Questions due | April 16, 2019 at 2:00 p.m. MST |
| Q&A Posted to BidNet (Tentative) | April 18, 2019 |
| RFP Opening Date | May 7, 2019 at 2:00 p.m. MST |
| Planned Implementation | June 1, 2019 |
| Portal Launch Date | August 1, 2019 |

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**REQUEST FOR PROPOSAL
EMPLOYEE WELLNESS PORTAL
RFP #19-69N-001**

Poudre School District is requesting electronic sealed proposals from professional and qualified firms to provide a wellness web-based portal for its employees that includes health education, an online health risk assessment, wellness incentive administration and tracking of biometric screening (or annual well exam) data/results.

The District shall provide copies of this RFP to Firms through the electronic solicitation platform www.bidnetdirect.com where registered Firms are required to submit their electronic RFP response along with the first and last name, telephone number and e-mail address of the employee within their organization who will be designated as the District's primary contact with respect to this RFP and their Firm's response thereto. The District may provide copies of this RFP to other Firms upon request, who are also requested to provide the first and last name, telephone number and e-mail address of the employee within their organization who will be designated as the District's primary contact with respect to this RFP and their response thereto.

Questions regarding this RFP must be in writing and shall only be directed to the District via the BidNet platform any time after the issuance of this RFP through and including 2:00 p.m. MST on Tuesday, April 16, 2019. Questions received after the date/time and/or not submitted electronically through the BidNet platform may not be addressed.

Each question submitted, as well as the District's response thereto, shall be provided in a questions and answers document via www.bidnetdirect.com

The District will only accept and consider electronically submitted proposals from Firms, which must be submitted and received in the www.bidnetdirect.com electronic solicitation portal on or before 2:00 p.m. MST on Tuesday, May 7, 2019. at which time the submission portal will close, and no further submissions be allowed or considered.

It is the sole responsibility of the Firm to see that the proposals are submitted through the BidNet portal by the submission deadline.

Sales Prohibited/Conflict of Interest: No officer, employee, or member of the School Board, shall have a financial interest in the sale to the school district of any real or personal property, equipment, material, supplies or services where such officer or employee exercises directly or indirectly any decision-making authority concerning such sale or any supervisory authority over the services to be rendered. This rule also applies to subcontracts with the School District. Soliciting or accepting any gift, gratuity favor, entertainment, kickback or any items of monetary value from any person who has or is seeking to do business with the District is prohibited.

Collusive or sham proposals: Any proposal deemed to be collusive or a sham proposal will be rejected and reported to authorities as such. Your authorized signature on this proposal assures that such proposal is genuine and is not a collusive or sham proposal.

The District reserves the right to reject any and all proposals and to waive any irregularities or informalities.

Sincerely,
Jon Babcock
Senior Procurement Agent
jbabcock@psdschools.org

**REQUEST FOR PROPOSAL
EMPLOYEE WELLNESS PORTAL
RFP #19-69N-001**

BACKGROUND

Poudre School District (the District) is a high-performing district, covering more than 1,800 square miles in northern Colorado with diverse school settings. The District's instructional program is centered around District Ends, under the Policy Governance model, developed to support a comprehensive curriculum.

While more than 70% of the District's families choose to send their children to their neighborhood school, the District does support school choice and offers a wide spectrum of educational programs to fit any child's needs. Program options include International Baccalaureate, Core Knowledge, Bilingual/Dual Language Immersion, Hybrid/Online, Expeditionary Learning, Science, Technology, Engineering and Math (STEM) along with extra-curriculars and athletics. The District has two LEED certified school buildings and over 30 Energy Star awards and supports operational sustainability in all areas of work.

Our Schools:

- 31 elementary schools
- 10 middle schools
- 4 comprehensive high schools
- 6 option (100% choice) schools
- 3 alternative high schools
- 5 charter schools
- 1 online school

The District is fully accredited by the Colorado Department of Education Accreditation and Accountability Unit and is subject to periodic monitoring to ensure continued compliance with accreditation standards.

Currently, PSD provides its employees with yearly onsite biometric screenings. These screenings are offered free of cost to all benefited employees and dependents. In addition, PSD offers a Health Risk Assessment year-round. Employees who complete a biometric screening (or annual well exam) and the health risk assessment by June 30 of each year receive a \$25 per month discount on their medical insurance premiums.

PSD also has several partnerships with local fitness centers and receives a corporate discount at many locations.

PSD has a contract with the University of Colorado Health, Associates in Family Medicine, Genesis Health Clubs and UCHealth Plan Administrators to provide an integrative health management system. This health management system contains four main parts which include an employee health clinic, lifestyle health program, EAS services and wellness programs. The wellness program is a major part of this program and senior leadership at PSD is invested and committed to continuing and enhancing the value of the program. PSD is looking for a partner

who can help design and maintain a cutting-edge wellness platform that will continue to enhance the well-being of employees and their families.

General characteristics of Poudre School District employees:

- Average employee age is 44 years
- Employee population is 25.3% male
- Total employee count is approximately 5,000
- Approximately 3,400 are eligible for benefits including medical, dental, vision and life insurance
- Current employee enrollment in the medical plans is 3,085:
 - PPO-1 Plan – 2,575
 - PPO-2 Plan – 510
- Current enrollment in the medical plans including employees, spouses, and dependents is approximately 5,000

PSD OBJECTIVES:

Our goal is to select the Firm who will be the most effective and proactive partner in performing the full range of services related to employee wellness tracking and communication. In the past PSD has had several third-party partners to offer employees services such as health risk assessments, biometric screenings and flu shots. To assist with cost savings related to health care and to support a wellness workplace, PSD is looking to have a more comprehensive approach to a wellness and health management program.

These services include, but are not limited to the following:

- Creative wellness strategy and innovative thought
- Online health risk assessment
- Web-based health education and tracking
- Activity-based programs
- Input and tracking of biometric screening (or annual well exam) results in portal Robust communications
- Incentive administration
- Wearable technology
- Android or IOS Application
- Reporting capabilities to assist in showing a return on investment for the wellness program

1.0 GENERAL CONDITIONS

- 1.1 Firm must provide all requested information. Failure to do so may result in rejection of the proposal at the option of the District.
- 1.2 Proposals must meet or exceed specifications contained in this document.
- 1.3 The District is exempt from city, county, state and federal sales/excise taxes. Tax exempt certificates will be issued upon request.
- 1.4 Submission of a proposal is deemed as acceptance of all terms, conditions and specifications contained in the District's solicitation package initially provided to the Firm. Any proposed modification must be accepted in writing by the District prior to award of the Agreement.
- 1.5 Each Firm (and its employees, representatives and subcontractors) agrees to abide by all applicable Federal, State and local codes, laws, rules and regulations.
- 1.6 The awarded Firm shall furnish all supplies and services, which conform to all applicable safety codes and regulations.
- 1.7 Contact with District personnel regarding this Solicitation, other than inquiries to the specific Procurement Agent identified in this document, may be grounds for elimination from the selection process.
- 1.8 Information and materials submitted in response to this Solicitation may be considered public records subject to disclosure under the Colorado Open Records Act ("CORA"), C.R.S. §§ 24-72-200.1 to -205.5. Information and materials that Firm believes are confidential and not subject to disclosure under CORA must be submitted separately with a citation to the section of CORA and any other relevant law under which Firm believes they are confidential. The District, not Firm, shall determine whether information and materials so identified will be withheld as confidential, but will inform Firm in advance of disclosure to give it an opportunity to take legal action to protect its interests vis-à-vis the party making the CORA request.
- 1.9 The accuracy of the Firm's response is the sole responsibility of the Firm. No changes in the proposal shall be allowed after the submission deadline, except when the Firm can show clear and convincing evidence that an unintentional factual mistake was made, including the nature of the mistake.
- 1.10 Responses shall contain a signature of an authorized representative of the Firm in the space provided on the Proposal Certification Form. Failure to properly sign the proposal may invalidate the response.
- 1.11 For services requiring Firm's presence on District property and the project site, the Firm must provide proof of insurance that meets the insurance requirements stated in section 7.0 of this document.
- 1.12 The awarded Firm is not permitted to transfer any of its rights, interests or obligations in the project whether by assignment or otherwise, without prior written consent of the District's Procurement Services Department.

- 1.13 Firm must note in their response any intent to use subcontractors. The subcontractor's name, address, phone number and three client references, along with the type of work to be performed must be included. Use of subcontractors may be considered as a factor in the District's evaluation process. If the Firm fails to notify the District of its intent to use subcontractors in the proposal submittal, the proposal may be considered a void offer. Subcontractors will be allowed only by written permission of the District. The Firm agrees that it is fully responsible to the District for the acts or omissions of its subcontractors or any persons employed by them, in the same way as it is for the acts and omissions of persons directly employed by the Firm. Nothing contained in the Agreement or any subcontract shall create any contractual relation between any subcontractor and the District.
- 1.14 The District reserves the right to reject any and all proposals or any part thereof, to waive any formalities, and further, to award the proposal to the responsible Firm as deemed in the best interest of the District. There is no expressed or implied obligation for the District to reimburse responding Firms for any expenses incurred in preparing proposals in response to this request.
- 1.15 Responses to this Solicitation will be independently evaluated by an evaluation committee to be established for such purpose.
- 1.16 Only the names of the companies submitting proposals will be disclosed prior to the completion of Agreement negotiations.
- 1.17 Proposals submitted will be evaluated using pre-determined objective rating criteria. Those that are clearly non-responsive to the stated requirements may be eliminated prior to the evaluation. Prior to proposal submission, Firms are encouraged to check the Rocky Mountain E-Purchasing System/BidNet website prior to finalizing responses to ensure additional requirements are incorporated into its submissions.
- 1.18 The District reserves the right to negotiate further with one or more Firm(s) or to request additional information. Should the District determine in its sole discretion that only one Firm is fully qualified or that one Firm is clearly more highly qualified than the others under consideration, an Agreement may be negotiated and awarded to that Firm.
- 1.19 In the event the District has reasonable grounds to believe that any individual assigned to perform work under Solicitation has a criminal record, is a registered sex offender, is under the influence of alcohol or other substance, has exhibited violence or based upon other information the District deems reliable; the District may exclude such individual from any school building or grounds or impose reasonable conditions upon such individual's presence upon any school premises. In the judgment of the District, if an Agreement cannot be performed as a result of such action, the Agreement may be terminated.
- 1.20 The initial agreement between PSD and the awarded vendor is planned to commence in June 2019 and continue in full force through July 31, 2020 unless earlier terminated by PSD as provided in section 1.21 below. The Agreement, at the option of the District, may be extended for up to four (4) additional one (1) year terms, with the commencement of a written mutually agreed upon amendment to the Agreement for each one (1) year term.

- 1.21 Notwithstanding the planned term of an Agreement and/or any extensions thereof as provided in section 1.20 above, the District may terminate an Agreement at any time in its sole discretion for any reason, with or without cause, upon written notice served on the Firm no less than thirty (30) days prior to the date of termination. In the event of such early termination by the District, the Firm shall be paid up to the date of termination for services performed under and in accordance with this Agreement.
- 1.22 Notwithstanding any other term or provision of this solicitation, the District's obligations hereunder are expressly subject to its budgeting and appropriation of sufficient funds for each fiscal year (July 1 - June 30) an Agreement is in effect. In no event shall the District's obligations in an Agreement constitute a multiple-fiscal year direct or indirect debt or other financial obligation under Article X, Section 20(4)(b) of the Colorado Constitution.
- 1.23 Independent Contractor
- 1.23.1 The Firm shall provide the services as an independent contractor of the District. As such, the Firm shall have the right to determine how and by whom the services will be provided, subject to and consistent with the terms and conditions of this Solicitation.
- 1.23.2 The Firm shall be exclusively responsible for: (a) all compensation, employment tax withholdings and payments, and all fringe benefits for its employees in full compliance with all applicable federal, state and local laws; (b) all insurance coverages and benefits for its employees in full compliance with all applicable federal, state and local laws, including but not limited to pension or retirement benefits, workers' compensation, unemployment compensation, and Social Security benefits; and (c) all payments to its contractors and subcontractors for goods and/or services directly or indirectly related to this Solicitation.
- 1.23.3 Nothing in this Solicitation or as a result of this Solicitation shall be construed as creating a single enterprise, partnership, joint venture or employer-employee relationship between a future Firm and the District. The future Firm will not be considered a partner, agent or representative of the District and will not represent itself to be a partner, agent or representative of the District. The District is not a partner, agent or representative of any future Firm and shall not represent itself to be a partner, agent or representative of the Firm.
- 1.24 Certification Regarding Illegal Aliens
- 1.24.1 Firm certifies, represents, warrants and agrees that it will not knowingly employ or contract with an illegal alien to provide services under this Agreement and will not enter into an Agreement with a subcontractor that fails to certify to Firm that the subcontractor will not knowingly employ or contract with an illegal alien to provide services under this Agreement. Firm also certifies, represents, warrants and agrees that it will confirm the employment eligibility of all its employees who are newly hired for employment to provide services under this Agreement through Firm's participation in either: (a) the E-Verify Program created under federal law

and jointly administered by the Department of Homeland Security and the Social Security Administration; or
(b) the Colorado Department of Labor and Employment Program (“Department Program”) established pursuant to C.R.S. § 8-17.5-102(5)(c).

1.24.2 Firm shall not use either the E-Verify Program or the Department Program procedures to undertake pre-employment screening of job applicants while this Agreement is being performed. If Firm obtains actual knowledge that a subcontractor providing services under this Agreement knowingly employs or contracts with an illegal alien, Firm shall notify the subcontractor and the District within three (3) days that Firm has such actual knowledge and terminate the subcontract within three (3) days of providing the notice if the subcontractor has not stopped employing or contracting with the illegal alien.

Firm shall comply with any reasonable request made by the Department of Labor and Employment in the course of an investigation undertaken pursuant to the authority of C.R.S. § 8-17.5-102(5). If Firm participates in the Department Program, it shall: (a) notify the District and the Department of Labor and Employment of such participation as required by law; and (b) within twenty (20) days after hiring an employee to provide services under this Agreement, provide to the District a written notarized copy of an affirmation that it has examined the legal work status of such employee, retained file copies of the documents required by 8 U.S.C. § 1324a, and not altered or falsified the identification documents for such employee.

- 1.25 The District may make such reasonable investigations as deemed proper and necessary to determine the ability of the Firm to perform the work. Firm shall furnish to the District all such information and data for this purpose as may be requested. The District further reserves the right to reject any proposal if the evidence submitted by, or investigations of, such Firm fails to satisfy the District that such Firm is properly qualified to carry out the obligations of the Agreement and to complete the work/furnish the item(s) contemplated therein.
- 1.26 An Agreement resulting from this Solicitation shall be governed by and construed in accordance with the laws of the State of Colorado. Venue for any and all legal action regarding or arising out of transactions covered herein shall be solely in the District Court in and for Larimer County, State of Colorado.
- 1.27 The awarded Firm will agree not to refuse to hire, discharge, promote, demote, or to otherwise discriminate in matters of compensation against any person otherwise qualified solely because of race, creed, sex, national origin, ancestry or physical handicap.
- 1.28 Firm may appeal the award by submitting, in writing, a request for re-consideration to the District’s Procurement Manager within seventy-two (72) hours after the receipt of the notice of award.
- 1.29 In the event the awarded Firm defaults on its Agreement or the Agreement is terminated for cause due to performance, the District reserves the right to re-procure the materials or services from the next lowest Firm or from other sources during the remaining term of the terminated/defaulted Agreement. Under this arrangement, the District shall charge the awarded Firm any differences between its price and the price to be paid to the next lowest Firm, as well as, any costs

associated with the re-solicitation effort which resulted from such default or termination.

- 1.30 Although this Solicitation may specify the number of items/services intended to be purchased by the District, it is understood and agreed that the District may, during the term of the Agreement, purchase additional quantities of the same model or brand of item, or type of service at the contracted price from the awarded Firm.

The option, if exercised, is the prerogative of the District and shall be honored by the Firm as a condition of the Agreement award. While the quantities are stipulated in this solicitation, it is hereby agreed and understood that the District has the right to adjust/reduce the quantities ordered or services provided in conjunction with this Solicitation based on budgetary restrictions.

- 1.31 During the term of the agreement, the Firm shall be responsible to correct, at its expense, any problems, defects and/or deficiencies reported which do not meet the specifications set forth in the Scope of Work. The Firm will correct all defects and/or deficiencies associated with this Agreement and/or documentation within five (5) business days of notification from the District in writing to the Firm of such defects and/or deficiencies within such period, as may be necessary to make correction(s) using all due diligence and dispatch as mutually agreed upon between the District and the Firm.
- 1.32 The awarded Firm shall submit an invoice to the District's accounts payable department for completed services. The invoice shall reference the appropriate purchase order number. The date of the invoice shall not exceed thirty (30) calendar days from the date of completion of services. Under no circumstances shall the invoice be submitted to the District in advance of the delivery and written acceptance of the services.
- 1.33 For the purposes of Solicitation evaluation, Firm must indicate any variances to the specifications and terms and conditions, no matter how slight. If variations are not stated in the Firm's response, it shall be construed that the response fully complies with the specifications and terms and conditions. Notwithstanding the above, it is hereby agreed and understood that the District reserves the right to reject these variations if they individually or as a whole, do not meet the standards established in the specifications.
- 1.34 The District is a member of, or affiliated with, several regional professional procurement organizations within Colorado and Wyoming. These organizations are comprised of governmental procurement agents, or agency representatives responsible for the procurement function.

These organizations include:

Colorado Educational Purchasing Council (CEPC) - A cooperative procurement organization comprised of procurement agents/buyers representing all Colorado public school districts.

Multiple Assembly of Procurement Officials (MAPO) - A cooperative procurement organization comprised of procurement representatives from state, county, municipal, governments, special districts or school districts along the front range of the Rocky Mountains in Colorado.

Rocky Mountain Governmental Purchasing Association (RMGPA) - A chapter member of the National Institute of Governmental Purchasing (NIGP), consisting of public procurement professionals and their representative agencies which include approximately 100 state, county, and municipal governments; school districts and higher education; and other special districts.

Members of these organizations, at their discretion, may request use of the Agreement or awards that result from this solicitation. Each governmental entity which uses an Agreement(s) resulting from this solicitation would establish its own Agreement, issue its own orders, schedule deliveries, be invoiced individually, make its own payments, and issue its own exemption certificates as required by the Firm.

It is understood and agreed that the Poudre School District is not a legally binding party to any contractual Agreement made between another governmental entity and the Firm as a result of this solicitation. The District shall not be liable for any costs or damages incurred by any other entity. Usage by any other entity shall not have a negative impact on the District in the current term or in any future terms.

2.0 SCOPE OF WORK

Provide detailed responses to the requirements listed below.

2.1 Legal/Legislative Compliance

2.1.1 Explain what steps you have taken to become HIPAA compliant.

2.1.2 Explain how your company stays current with changes in federal and state laws pertaining to wellness programs and how this information will be communicated to PSD.

2.2 Communication/Education

2.2.1 Explain what types of employee communication services you have for your clients' employees specifically relating to health risk assessments, the wellness web portal and incentive administration. Please provide samples of employee communication materials that you have including both generic and program specific.

2.2.2 Thoroughly describe any website-based employee communication tools that you have. Please provide samples of these materials.

2.2.3 Explain customization options available on the communication materials including website branding.

2.2.4 Are all of your communications available in Spanish or do you provide translation for materials chosen by PSD?

- 2.2.5 PSD has its own Communications department. Explain how you will work with them to develop materials and strategy to promote the programs to employees to maximize participation.
- 2.2.6 Please explain how you might work with other PSD contracted vendors, such as PSD Lifestyle Health Coaches, for employee communication.

2.3 Reporting Services

- 2.3.1 Provide a list and describe all activity and outcomes reports PSD would receive on a monthly, quarterly or annual basis for health risk assessments, biometric screenings and activity-based programs. Provide samples of these reports.
- 2.3.2 If you have a standard reporting package that is different than the information provided in item 2.3.1, explain it and provide samples and the frequency of providing the reports.
- 2.3.3 Please describe your methodology for estimating cost savings and return on investment (ROI). Include all components utilized in the calculations (e.g. costs, benefits, etc.).
- 2.3.4 We understand that cost savings and ROI vary by program type and are based on a variety of factors including incentives, communication, participation, support at the worksite, etc. Based on experience with your clients, please describe what type of cost savings PSD might achieve year one through year three through the services listed under the PSD Objectives section of this RFP and what components need to be in place to achieve this.
- 2.3.5 Describe any customized or ad hoc reporting capabilities.
- 2.3.6 Describe any web-based reporting accessibility PSD administration will have made available to them.
- 2.3.7 Describe your ability to report HRA and biometric screening data to our third-party administrator so the information can be integrated into our health management system.
- 2.3.8 If you are not our current vendor, please describe how you would handle receiving or transferring data from our current portal vendor.

2.4 Health Risk Assessment (HRA)

- 2.4.1 Please provide detailed information about the HRA you have available. Provide a list of health risk categories that are included in the HRA and information on availability of customization. At a minimum, PSD is looking for the HRA to address tobacco use, weight loss/management, cholesterol management, blood pressure management, nutrition, physical activity and stress management.
- 2.4.2 Please provide demo access information including ID and password to the online HRA for PSD to view.

- 2.4.3 If you will be subcontracting for HRA services, please identify:
 - 2.4.3.1 subcontracted vendor and their address,
 - 2.4.3.2 length of your relationship with the vendor, and
 - 2.4.3.3 two client references where you have partnered with this organization for services
- 2.4.4 Explain any web-based feedback or reports the participant will receive immediately upon completion of an online HRA and biometric screening
- 2.4.5 Explain the customization option of web-based feedback including appropriate referral resources available to participants.
- 2.4.6 Based on your current Book of Business, explain what level of HRA participation you expect according to the following table:

| | Average rate of employee participation |
|--|--|
| HRA with no incentive | |
| HRA with incentive of \$20-\$50 | |
| HRA with incentive of \$51-\$99 | |
| HRA with incentive of \$100+ | |
| Other incentive options, please list the options | |

2.5 Web Portal Services

- 2.5.1 Explain and provide support for why your web portal can be considered best-in-class, specifically:
 - 2.5.1.1 Timeliness, accuracy and breadth of health information
 - 2.5.1.2 User-friendliness, in terms of navigation and accessibility
 - 2.5.1.3 Visual appeal (e.g. graphics)
 - 2.5.1.4 Level of interactivity with online tools
 - 2.5.1.5 Engaging health education content
 - 2.5.1.6 Activity based programs
 - 2.5.1.7 Customization
 - 2.5.1.8 Interaction with wearable technology
 - 2.5.1.9 Features for Spanish speaking participants
(Are most items in the portal available in Spanish?)
 - 2.5.1.10 Ability to link directly from PSD's website
- 2.5.2 Describe some features of your website, such as:
 - 2.5.2.1 Exercise demos
 - 2.5.2.2 Meal planning and recipes
 - 2.5.2.3 Calorie and exercise tracking
 - 2.5.2.4 Social networking
 - 2.5.2.5 Phone applications
 - 2.5.2.6 Calendar of events
- 2.5.3 Explain how you will engage participants with limited on-the-job access to the internet.
- 2.5.4 Please provide demo access information including ID and password to the web portal for PSD to view.

- 2.5.5 If you will be subcontracting for web portal services, please identify:
 - 2.5.5.1 subcontracted vendor and its address,
 - 2.5.5.2 length of your relationship with the vendor and
 - 2.5.5.3 two client references where you have partnered with this organization for services

2.6 Wearable Technology and Applications

- 2.6.1 Describe your ability to utilize wearable technology such as but not limited to Fitbit, Apple watches, jawbones, on the portal.
- 2.6.2 If you have your own wearable technology, describe the product and pricing for the product.
- 2.6.3 Describe the process for distribution of the wearable technology and how long it takes to receive.
- 2.6.4 Explain your policy regarding replacement wearable technology.
- 2.6.5 Please describe if your portal has an IOS or Android application, the pricing for this application, and the interactive abilities for the app.

2.7 Biometric Screenings

- 2.7.1 Please describe the process you use for inputting biometric screening (or annual well exam) data you receive from a third party into a member's individual portal account.

2.8 Incentive Administration

- 2.8.1 Explain your ability to manage and track wellness incentives.
- 2.8.2 Explain how you handle taxation for paid incentives.
- 2.8.3 If you will be subcontracting for incentive administration services, please identify:
 - 2.8.3.1 subcontracted vendor and its address,
 - 2.8.3.2 length of your relationship with the vendor and
 - 2.8.3.3 two client references where you have partnered with this organization for services

2.9 Strategic Planning

- 2.9.1 Please describe your strategy setting process, including timing and data requirements.
- 2.9.2 Describe your company's vision for the future of employer-based wellness programs beyond what PSD already provides.
- 2.9.3 Describe any work that you have done with companies who have an employee health clinic and/or a separate lifestyle health management program.

- 2.9.4 Describe any disruption that you foresee to members using the current system during any point of the implementation process of the new system you are proposing.

3.0 PROPOSAL REQUIREMENTS

Offerors must respond to each requirement below.

3.1 Background and Organization Information

- 3.1.1 Briefly furnish your organization's history, legal form (sole proprietorship, partnership, corporation and State of incorporation), number and location of offices, number of employees, days/hours of operation and other pertinent data.
- 3.1.2 Indicate how many years your company has been active in the employee wellness web portal business.
- 3.1.3 Profile your organization's most noteworthy qualifications for providing employee wellness web portal services to PSD. Specifically highlight qualifications that distinguish your organization from competitors.
- 3.1.4 How many companies does your organization currently service?
- 3.1.5 What percentage of your total clientele are school districts?

3.2 Client Service/Quality Assurance

- 3.2.1 Identify the account team that will be servicing Poudre School District including both the implementation team and ongoing account team.
- 3.2.2 Submit profiles of the individual(s) who will be assigned to provide the requested services, including their qualifications and recent related experience providing similar services.
- 3.2.3 Describe your organization's procedures for monitoring client satisfaction.
- 3.2.4 Describe how your company is taking a leadership role within the industry.

3.3 Fees

- 3.3.1 Describe your proposed fees for the services described in this RFP as requested in Appendix A. Provide your fee schedule for the term of this contract. Any services that would require fees in addition to your pricing proposal must be clearly noted with proposed fees stated.
- 3.3.2 If you charge fees for employee communication, please indicate the basis of your charges (hourly, by project, distribution, etc.) and what typical charges might be.

4.0 **FIRM QUALIFICATIONS**

4.1 The Offeror must, at a minimum, have three (3) continuous years of experience in the wellness web-based portal marketplace with health risk assessment and wellness incentive administration capabilities.

4.2 The Offeror must be licensed in the State of Colorado.

5.0 **REVIEW AND ASSESSMENT**

5.1 Professional firms will be evaluated on the following General Qualifications criteria. These criteria will form one basis for review of the written proposals and interview session.

5.2 The rating scale shall be from 1 to 5, with 1 being a poor rating, 3 being an average rating, and 5 being an outstanding rating.

| Qualification | Weight | Standard |
|--------------------------------|---------------|---|
| Scope of Work | 8 | <ul style="list-style-type: none">• Demonstrated ability to meet all of the PSD objectives• Demonstrated understanding of work to be performed |
| Pricing | 6 | <ul style="list-style-type: none">• Best value for PSD for all services to be provided• Value added components: discounts, programs offered |
| Capability | 3 | <ul style="list-style-type: none">• Professional, technical, and managerial qualifications and experience of company and personnel assigned to account• 3 years in marketplace |
| RFP Preparation and Compliance | 2 | <ul style="list-style-type: none">• Completeness and thoroughness• Organization |
| References | 1 | <ul style="list-style-type: none">• At least 3 references including public sector |

The proposal will be evaluated on a cumulative point system.

6.0 REFERENCE EVALUATION

6.1 The Project Manager will check references using the following criteria. The evaluation rankings will be labeled Satisfactory/Unsatisfactory.

| QUALIFICATION | STANDARD |
|-----------------------------------|---|
| Overall Performance | Are you pleased with the services provided? |
| Thoroughness | Does the service provider follow through with the project, keeping you informed of status? |
| Knowledge of Wellness Web Portals | Is there an understanding of professional practices and procedures? |
| Reporting | Are the service provider reports thorough and complete? |
| Specific Contract Requirements | Is the service provider able to provide services per required schedules? Are reports completed on time? |

7.0 INSURANCE

Firm shall procure and maintain the required insurance specified below for the duration of this Agreement, which insurance shall be written for not less than the amounts specified or greater if required by law. Specified coverages and amounts may be provided by a combination of a primary policy plus an umbrella or following form excess policy. If not otherwise required by law, lower amounts may be acceptable upon review and written approval by the District’s Director of Records and Risk Management. All insurance shall be with a carrier licensed in the state of Colorado and shall have a minimum A.M. Best rating of A- VII. Firm shall furnish the District’s Director of Records and Risk Management with certificates of the required insurance prior to the District’s approval and signing of this Agreement, and with renewal certificates prior to the expiration of any required insurance that expires during the term of this Agreement. Any insurance and/or self-insurance carried by the District is excess of the coverage extended to the District by Firm. Firm shall provide at least thirty (30) days’ advance written notice to the District prior to cancellation or change of coverage. The insurance requirements specified in this section 6.0 shall not reduce the indemnification liability that Firm has assumed in section 6.1 below.

Professional Liability

- a. Each Occurrence or Wrongful Act Limit \$1,000,000
- b. Annual Aggregate Limit \$1,000,000
- c. In the event that the Professional Liability insurance required by this Agreement is written on a claims-made basis Firm warrants that any retroactive date under the policy shall precede the effective date of this Agreement and that either continuous coverage will be maintained, or an extended discovery period will be exercised for a period of two (2) years beginning at the time work under this Agreement is completed.

Workers' Compensation and Employers' Liability*

- a. State of Colorado Statutory
- b. Employer's Liability \$500,000 Each Accident
\$500,000 Disease – Policy Limit
\$500,000 Disease – Each Employee
- c. Waiver of subrogation in favor of Poudre School District R-1; copy of policy endorsement must be attached to the Certificate of Insurance

* This requirement shall not apply if Firm is exempt under the Colorado Workers' Compensation Act **AND** if Firm has a current Workers' Compensation Coverage Rejection on file with the Colorado Department of Labor and Employment, Division of Worker's Compensation.

7.1 INDEMNIFICATION

Firm shall indemnify and hold harmless the District and the District's Board members, employees, representatives and agents from and against any and all liability arising from any suit, action, grievance, charge or proceeding brought in connection with or related to Firm's operations, provision of Services and/or conduct of any of its employees, volunteers, agents or representatives. The indemnification and hold harmless obligation hereunder shall include all attorney fees, costs and expenses incurred by the District and/or the District's Board members, employees, representatives and/or agents in defense of said suits, actions, grievances, charges and/or proceedings.

Nothing in this section 6.1 or otherwise in this Agreement shall be construed in any way or applied in any manner as a compromise or waiver of the District's rights and protections under the Colorado Constitution or the Colorado Governmental Immunity Act.

8.0 MODEL FORMAT OF THE PROPOSAL

To simplify the review process and obtain the maximum degree of comparability, proposals should be organized in a manner specified by this RFP as follows:

8.1 Title Page

8.1.1 Show the RFP subject, the name of the proposing Firm, local address, telephone number, email address, name of the contact person, and the date.

8.2 Table of Contents

8.2.1 Include a clear identification of the material by section and by page number.

8.3 Letter of Transmittal – Limit to two (2) pages

8.3.1 Briefly state the proposer’s understanding of the work to be done. Describe your Firm’s current workload capacity and the Firm’s ability to take on the scope identified in this RFP document.

8.3.2 State the names of the person(s) who will be authorized to make representations for the proposer, their title(s), address(es), telephone number(s), and email address(es).

8.4 Summary of the Proposer’s Qualifications

8.4.1 Specifically respond to each item within “4.0 Firm Qualifications,” in the sequence presented in this RFP.

8.5 Proposer’s Approach

8.5.1 Submit a work plan to accomplish the scope defined in “2.0 Scope of Work.”

8.6 Reference Form

8.6.1 Submit completed reference form “10.0 Reference Form.”

8.7 Summary Statement

8.7.1 Submit a summary statement relative to your company’s qualifications (Section 4.0) in the wellness web portal marketplace, as well as a brief description of any special considerations PSD should consider, such as:

- Industry specialties not addressed in this RFP
- Unique industry strategies not addressed in this RFP

8.8 Completed Proposal Certification Form

8.8.1 Submit the signed “11.0 Proposal Certification Form.”

8.9 Exhibits

8.9.1 Submit exhibits as identified within **Proposal Check List** (Section 9.0).

9.0 PROPOSAL CHECKLIST

_____ Proposal includes detailed responses to the requirements listed in the scope of work Section 2.

_____ Proposal includes detailed responses to each point of the Proposal Requirements in Section 3.

Exhibits have been included:

_____ Proposal response is in the format as described in Section 8.0

_____ Completed Fee Proposal - Appendix A

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10.0 REFERENCE FORM

**REQUEST FOR PROPOSAL
EMPLOYEE WELLNESS PORTAL
RFP #19-69N-001**

References are mandatory – List three (3) references for which your company has completed similar services for projects of similar scope.

10.1 Company Name _____
Address _____
Contact Person _____
Telephone _____
Email _____
Describe type of work/service performed or items supplied _____

10.2 Company Name _____
Address _____
Contact Person _____
Telephone _____
Email _____
Describe type of work/service performed or items supplied _____

10.3 Company Name _____
Address _____
Contact Person _____
Telephone _____
Email _____
Describe type of work/service performed or items supplied _____

11.0 PROPOSAL CERTIFICATION FORM

REQUEST FOR PROPOSAL
EMPLOYEE WELLNESS PORTAL
RFP# 19-69N-001

The District will only accept and consider electronically submitted proposals from Firms, which must be submitted and received in the www.bidnetdirect.com electronic solicitation portal on or before **2:00 p.m. MST on Tuesday, May 7, 2019.**

The undersigned hereby affirms that:

- Firm is a duly authorized agent of the company issuing this proposal and that all information provided in the proposal is true and accurate.
- Firm has read the conditions and technical specifications, which were made available to the company in conjunction with this solicitation, and fully understands and accepts these terms unless specific variations have been expressly listed in the proposal.
- Firm will adhere to all terms and conditions and provide, at a minimum, all services as expressed in the solicitation and/or the Firm's proposal responding to the solicitation.
- Firm meets or exceeds all of the required criteria as specified by this solicitation, or if not, has submitted a Justification for Consideration addressing any failure to meet the criteria.
- Firm's proposal is being offered independently of any other Firm and in full compliance with the terms specified in the solicitation.
- Firm will accept any awards made to it, contingent on Agreement negotiation, as a result of this solicitation for a minimum of ninety (90) calendar days following the date and time of the solicitation opening.

Firm Name: _____

Signature of Agent: _____

Printed Name: _____

Title: _____

E-mail Address: _____

Phone Number: _____

Fax Number: _____

Contact Person: _____

(if different from Agent – include email address and phone number)

NOTE: Proposals submitted without a signature of an authorized agent of the Firm may be considered non-responsive and ineligible for the award.

APPENDIX A
FEES PROPOSAL

Please use the following assumptions when quoting your proposed fees:

| ASSUMPTIONS | Percent | Participants |
|---|----------------|---------------------|
| Eligible for Biometric Screenings (employees only) | | 3,100 |
| Screening participation | 70% | 2,170 |
| Eligible for Web Portal | | 3,900 |
| Web portal participation | 70% | 2,730 |
| Eligible for Incentive Administration | | 3,900 |
| Incentive participation | 70% | 2,730 |
| Eligible for HRA Participation (employees only) | | 3,100 |
| Online HRA | 70% | 2,170 |
| Eligible for HRA Participation (employees and spouses) | | 3,600 |
| Online HRA | 70% | 2,520 |

| COMPONENT COSTS | Per Eligible Per Month | Per Participant Per Month |
|---|-------------------------------|----------------------------------|
| Health Risk Assessment | | |
| Online Questionnaire and Results | | |
| Online Health Content | | |
| Account Management | | |
| Online Maintenance (Annual) | | |
| One-time Set-Up Fees | | |
| HRA Reports | | |
| Management Reports | | |
| Customized Reports | | |
| Ad Hoc Reports | | |
| HRA Communication and Promotional Materials | | |
| Standard Materials | | |
| Customized Materials | | |
| Total Data Transfer Fees | | |
| Fee for Spanish HRA | | |
| Fee for translation services | | |
| Other: | | |
| Other: | | |
| Health Risk Assessment Total Fees | | |

| | | |
|---|--|--|
| Web Portal | | |
| Account Management | | |
| Online Maintenance | | |
| Online Set-Up Fees | | |
| Web Portal Reports | | |
| Management Reports | | |
| Customized Reports | | |
| Ad Hoc Reports | | |
| Total Data Transfer Fees | | |
| Customization | | |
| Other: | | |
| Web Portal Total Fees | | |
| Incentive Administration | | |
| Account Management | | |
| Tracking | | |
| Fulfillment | | |
| Implementation/Set-up Fee | | |
| Other: | | |
| Other: | | |
| Incentive Administration Total Fees | | |
| Other (please note if optional) | | |
| One-time Implementation fee | | |
| Communication Strategy | | |
| Communication Materials | | |
| Mailing Costs | | |
| Standard Reporting | | |
| Data Management | | |
| Measurement and Evaluation | | |
| System Enhancement for Reporting (indicate if optional) | | |
| Other: | | |
| Other Total Fees | | |

| Fee Summary (From Detail Above) | Per Eligible/Month | Per Participant/Month |
|--|---------------------------|------------------------------|
| Total One-Time Fees | | |
| Total Annual Fee | | |
| Total Monthly Fee | | |