COF RFP: Employee Assistance and Wellness Program Contract

As contract renewal date approaches COF determines the need for Request for Proposals (RFP) based on the following scenarios

1) Formal RFP: recommended for sizable new contracts or for renewals approximately every 5 years or when service needs change
2) Informal or competitive comparison: recommended for new contracts or every 1-3 years

GENERAL INFORMATION:

The Colleges of the Fenway is a consortium and 501C3 organization based in Boston, Massachusetts.

Define Purpose of contracted services:

To secure an Employee Assistance and Wellness Program for The Colleges of the Fenway's member institutions: Emmanuel College, Mass College of Art and Design, MCPHS University, Simmons University, Wentworth Institute of Technology and and its key partner, MASCO.

Identify Reviewing Group and Decision Makers: COF HR Directors Committee
Subject Matter Specialists as available through standing Committee or a subset and the Director of Collaborative Services and/or representative COF staff member

Timeline and key milestones:

- Kick off Meeting by 11/19
- Initial first draft for committee comment sent out 12/4
- Collect names of agencies by 12/4
- Initial Sub Committee meeting and RFP revision by 12/11
- Circulation of revised RFP by 12/18
- Final Comments due by 12/23/19
- Send notification and invitations by 1/8/2020
- **Proposal Deadline 1/29/2020**
- Review proposals and select finalists by 2/7/20
- **Invite finalists to present to committee at meeting week of 2/24/20**
- Determine Contractor by no later than 3/6/20
- Notify participants of decision by no later than 3/20/20
- Sign new contract by 4/1/2020

This Request for Proposals (RFP) states the instructions for submitting proposals and the procedure and criteria by which a vendor may be selected:

a. Definition of Parties: The Colleges of the Fenway and others collectively, will be referred to as "COF". The COF Committee will be referred to as "COF HR Directors Committee."
b. Respondents to the RFP will be referred to as "Bidders." The Bidder to whom the contract is awarded will be referred to as the "Contractor."
c. Scope: The type of engagement is outlined for vendors. Respondents are asked to follow the same numbering structure for their responses as indicated below and when a service is not available please denote such.

1. General Requested Services include:
    a. Cost/Fee Structure:
        i. Type of financial arrangement
        ii. Billing schedule
        iii. Fee structure and options if applicable
        iv. Cost savings including consortium benefit
        v. All final proposals must be firm for a period of 90 days from date of issue, and assume a July 1, 2019 effective date. Criteria for re-rating / pricing must be clearly outlined.
        vi. All rates are to be developed and presented on a non-participating basis.
        vii. Any additional fees associated with 'a la carte' services must be disclosed and clearly identified.
        viii. All rates/fees must be guaranteed for a minimum of 36-months from contract effective date.
        ix. All rates/fees for each line of coverage are to be developed net of commission.
        x. All coverage should be quoted independently, on a self-supporting basis. Any discounting associated with a 'packaged sale' must be separate, and fully disclosed.
        xi. The renewal coincident with the conclusion of any Rate Guarantee period must be delivered to XXX no later than 4 months prior to the conclusion of the Rate Guarantee period, unless agreed to in writing prior to the due-date.
        xii. The Premium grace period is to be 60 days, with no interest or late fees charged during this period.
        xiii. Any 'new business discounting' utilized for case acquisition purposes must be disclosed as part of proposal and preserved as part of pricing method at any/all subsequent renewals.
    b. Customer service guarantee

i. Identify your organization, including the location of your Home Office and local Sales Office.

c. SLA's for problem resolution
d. Specified Escalation path
e. Key account contact(s)
    i. Who will be the primary point(s) of contact on this account? Provide a brief biography for each. Requirement is to have master level clinicians.
    ii. What is the location of the individual office responsible for the following on this account:
        1. Customer Service
        2. Training and development
        3. Critical incidence response team
f. Reporting
    i. Proactive mechanism for feedback *from* colleges
    ii. Standard reporting practices for program utilization metrics
    iii. Reporting in what way and with what frequency to help us determine the effectiveness of the program
g. Bidder References: A list of three (3) references is required. These references should be organizations your firm has done business with in the past year on projects with a similar scope to this one.

2. Services available specific to the contract, in this case for Employee Assistance include an overarching focus on work/life balance such that employees have the resources needed to manage their personal and professional lives

    a. Communications
        I. Strong marketing and client communications
        II. A monthly newsletter with a topical focus on wellness programming or other health-related topics
        III. A variety of high quality on-site trainers with topic expertise
        IV. Web access with robust topical content and interactive tools
        V. Web-based orientation
        VI. Supervisor training
        VII. A toll free number

    b. Operations
        i. A demonstrated ability to connect employees to appropriate resources based on their insurance
        ii. Standard response time for non-emergency employee inquiries
        iii. A local and wide network of resources for referrals
        iv. Immediate help when needed and for those planning an event
        v. A 24/7 "real person" available for triage care and timely follow up

vi. established relations with national health groups and/or national self-help organizations
vii. A toll free number

c. Professional support services including but not limited to:
   i. Financial and legal consultation
   ii. Harassment
   iii. Management consultation and coaching
   iv. Management referrals
   v. Performance management
   vi. Policy violation
   vii. Substance abuse issues

d. Services for families in transition including but not limited to:
   i. Adoption consultation and referrals
   ii. Childcare consultation and referrals
   iii. Crisis intervention and trauma response
   iv. Daycare search
   v. Divorce Counseling
   vi. Elder care consultation and referrals
   vii. Grief Counseling
   viii. New parent transition
   ix. Unlimited 24/7 telephonic counseling

Other Services and requirements: Please comment on your experience working with an organization that is similar in structure

d. Evaluation Criteria: Proposals will be evaluated on many criteria deemed to be in COF's best interests, including, but not limited to: the ability to meet specifications and contract start date of March 1, 2013 responsiveness to terms and conditions, financial stability of bidder, cost to COF member institutions, procedures and policies of bidders, availability of personnel and references.

e. Communication with COF: It is the responsibility of the Bidder to inquire about any requirement of this RFP that is not understood. Responses to inquiries, if they change or clarify the RFP in a substantial manner, will be forwarded to all parties that have received a copy of the RFP. Inquiries from invited respondents must be made to:

Address: Colleges of the Fenway
375 Longwood Ave
Boston MA 02215
smatos@colleges-fenway.org
Phone: 617-879-7133

Award of Proposal: Presentations may be requested of one or more Bidders deemed by the Committee to be the best suited among those submitting proposals on the basis of the selection criteria. After presentations have been conducted, the HR Directors Committee may select the bidder which, in its opinion, has made the proposal that is the most responsive and most responsible and may award the contract to that bidder. The COF HR Directors Committee reserves the right to waive minor irregularities. COF may cancel this RFP or reject any or all proposals at any time prior to an award.

Note: The awarded vendor will be required to execute the Commonwealth of Massachusetts Terms and Conditions document - link below.
http://inside.massart.edu/Documents/departments/administrative_services/PU-Comm-TandC.pdf

Confidentiality: The information contained in proposals submitted for COF consideration will be held in confidence.

Proposal Submission: A SIGNED original and an electronic version in Microsoft Word of the proposal should be **submitted by 4:00 p.m. on 1/29/2020** to:

Colleges of the Fenway
Attention: Stephanie Matos
375 Longwood Avenue
Boston, MA 02215
smatos@colleges-fenway.org

Back up should be provided in a sealed date stamped envelope. Proposals received after the due date and time will be returned and eliminated from the process. Vendors are strongly encouraged to submit proposals in advance of the due date to avoid the possibility of missing the due date because of unforeseen circumstances. COF assumes no responsibility for delays caused by inaccurate email addresses or mail delivery service.

Proposals will be reviewed by a subcommittee and one or more agencies will be invited to present their proposals during the morning of <See schedule and timeline on the first page for date>.

GENERAL TERMS AND CONDITIONS:

a. Contract Term: The contract term shall be for a period of 3 years with an annual renewal unless the committee recommends a shorter engagement commencing upon March 1, 2013. With mutual agreement of the parties this contract may also be extended.

b. Contract Data: The Contractor is required to provide COF with detailed data concerning the contract on a quarterly basis, at the completion of each contract year and periodically as requested by COF for review and evaluation.

c. Cancellation/Termination: If the Contractor defaults in its agreement to provide personnel to the satisfaction of COF, or in any other way fail to provide service in accordance with the contract terms, COF may take whatever action it deems necessary to provide alternate services and may, at its option, immediately cancel this Contract.

d. Equal Opportunity: In the execution of the contract, the Contractor and all subcontractors agree not to discriminate on the grounds of race, color, religion, gender, sexual orientation, national origin or citizenship status, age, disability or veteran's status and to provide reasonable accommodations to qualified individuals with disabilities upon request.

e. Sexual Harassment: COF is committed to providing a positive environment for all students and staff. Sexual harassment, whether intentional or not, undermines the quality of this educational and working climate. COF has a legal and ethical responsibility to ensure that all students and employees can learn and work in an environment free of sexual harassment.

PERFORMANCE TERMS AND CONDITIONS:

a. Contract Administration: The Executive Director of the Colleges of the Fenway, Inc., or designee, shall be COF's authorized representative in all matters pertaining to the administration of this contract.

SIGNATURE:

COMPANY NAME _____

By: _____
(Signature)

_____
(Print Name)

_____
(Title)

_____
(Phone number)

_____
(Email Address)

_____
(Date)