Request for Proposals
20RFP097 Employee Assistance Program

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>02/11/2020 and 02/18/2020</td>
<td>Dates of public notice</td>
</tr>
<tr>
<td>02/19/2020</td>
<td>Due date for questions by 5:00 pm</td>
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<tr>
<td>02/25/2020</td>
<td>Questions and answers posted on our website</td>
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<tr>
<td>03/03/2020</td>
<td>RFP opening / due date at 2:00 pm CST</td>
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<tr>
<td>05/18/2020</td>
<td>AISD Board meeting for review/approval</td>
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Deliver Sealed Proposals to:
Austin ISD
Contract & Procurement Services
4000 S. IH 35 Frontage Road, 7th Floor
Austin, TX 78704

Contact:
Kristy Gonzalez
Senior Procurement Specialist
Phone: 512-414-2123
kristy.gonzalez@austinisd.org

- Questions must be submitted via e-mail to the contact person listed above. In the e-mail subject line, type: **Questions 20RFP097 Employee Assistance Program**
- Q & A and addenda will be posted on our website: www.austinisd.org/cp/bids
- Proposals are due no later than 2:00 pm on the date indicated. Your proposal must be delivered by mail or hand delivery in a sealed envelope or carton. Proposals received after the specified time shall not be considered.
- Please submit the following:
  - Required
    - One (1) hard copy marked “original” – include signed “required” forms
    - One (1) digital copy on a flash drive – include signed “required” forms
- FAX, e-mail or other electronic proposals will not be accepted.
- Proposals must be plainly marked with:
  - Name and address of the respondent
  - RFP number and title above

This solicitation is a request for proposals for services under Texas Education Code 44.031.
Checklist and Submission Guidelines

This checklist is provided to help you conform to all form/document requirements stipulated in this solicitation and attached herein.

(This is not a required form, it is not necessary to return this checklist with your proposal.)

Understanding the Proposal

Completed

☐ Read entire RFP document, appendices and attachments
☐ Attend pre-proposal conference (not required)
☐ Submit questions properly before deadline
☐ Review addenda, Q&A and other additional attachments
☐ Review Proposal Format section of RFP

Forms

Completed | Required

☐ | ✓ Bid Certification
☐ | ✓ Notification of Criminal History of Contractor
☐ | ✓ Debarment, Suspension and Ineligibility Certification
☐ | ✓ Conflict of Interest Questionnaire (CIQ) – electronic
☐ | ☐ Strategic Partner Profile
☐ | ☐ EDGAR Vendor Certification
☐ | ☐ Software Vendor Certification Form

Submitting the Proposal

Completed

☐ Prepare the proposal in the format specified and sign all required forms
☐ Submit required hard copy marked “original”
☐ Submit required quantity of digital copies on flash drive
☐ Package proposal in sealed envelope or carton properly labelled
☐ Deliver proposal to delivery address by RFP opening / due date and time
Table of Contents

Section I  Introduction

Section II  Historically Underutilized Business (HUB) Program Requirement

Section III  Proposal Format

Section IV  Initial Review of Proposals

Section V  Competitive Selection / Evaluation

Section VI  Scope of Service and Performance Requirements

Section VII  Appendices and Attachments
I. INTRODUCTION

The Austin Independent School District (herein after referred to as “AISD” or the “district”) is seeking proposals from firms qualified and experienced in providing Employee Assistance Program (EAP) services to assist District employees and their household members. Being a legal method of procurement for school districts in Texas, AISD would like to utilize current platforms to engage suppliers.

AISD is one of the ten largest school district in Texas, and serves approximately 80,000 students. AISD has approximately 10,500 employees housed in 130 work locations throughout the city. In this Request for Proposals (RFP), AISD is seeking an Employment Assistance Program Vendor that provides counseling support over a wide range of life issues. AISD values their employees and has made the employees’ overall wellbeing a priority. AISD offers a comprehensive benefits package and services that focus on overall wellbeing. With this Request of Proposal, AISD wishes to revisit the market to access options and evaluate competitive prices. The Employee Assistance Program for the district is viewed as a beneficial service to our employees and their household members.

Each Bidder, by submitting its proposal, agrees that the proposal is subject to the Austin ISD Policies and Provisions and agrees to comply with those conditions. Acceptance of a proposal will occur only when a contract is executed. Any contract will incorporate the Austin ISD Policies and Provisions and Standard Terms and Conditions and no commitment exists until a contract is executed by both parties.

II. HISTORICALLY UNDERUTILIZED BUSINESS (HUB) PROGRAM REQUIREMENTS

The HUB Program promotes and strongly encourages the involvement and participation of Historically Underutilized Businesses in District-wide procurements. According to AISD policies CH (LOCAL) and CV (LOCAL), the HUB Program guidelines are not applicable for this type procurement.

III. PROPOSAL FORMAT

A. Preface
   The Proposer shall provide an Executive Summary of two (2) pages or less, which gives in brief, concise terms, a summation of the proposal. Please include business name, address, point of contact and contact information.

B. Proposal
   The vendor’s proposal itself shall be organized in the following format and informational sequence:
Section I – Summary of Experience

This section shall contain the full name and address of the Proposer submitting the proposal and a brief summary of the Proposer’s experience and individual experience for personnel who will provide this product or service.

Section II - Scope of Service

A description of services and capabilities as outlined in the Scope of Service and Performance Requirements sections of this RFP, in the order shown. Clearly state any exceptions taken to the specifications of this RFP, or any conditions of the proposal.

Section III - Financial Proposal

This section shall contain a straightforward, concise delineation of the proposer’s fees to satisfy the requirements of this RFP. It is the proposer’s responsibility to specify all costs (i.e. administrative fees, processing fees, etc.) associated with providing the products or services required herein.

Section IV – References

References are to be from government agencies and/or firms, which are substantially serviced by the proposer (references most similar to Austin ISD and at least one local (Austin) and/or a Texas-based client should be provided). Each reference must contain the reference’s name, address, telephone number, and point of contact (including email address). A list of at least four (4) references from current customers must be provided.

Section V – Proposed Sample Agreement

This section shall contain Proposers sample agreement. Agreement shall include statement of work, any exhibits and proposed fees.

C. Required Forms

Forms are required with Original response & flash drive only; they can be excluded from additional requested copies.

Proposer shall execute the following required forms (located on our website: Required Forms link), and return the signed original with the proposal:

- Bid Certification
- Notification of Criminal History of Contractor
- Debarment, Suspension and Ineligibility Certification
- Software Vendor Certification Form (when applicable)
Conflict of Interest Questionnaire (CIQ). The CIQ is prepared by the Texas Ethics Commission, in compliance with Chapter 176 of the Texas Local Government Code. The form should be submitted on-line at Conflict of Interest Questionnaire - CIQ.

Forms for Review/Reference before Bid Submission can be located on our website: Forms for Review/Reference, below is a list of those documents:

- Policy and Provisions
- Purchase Order Terms and Conditions
- Service Agreements
- Master Purchase Agreement

IV. INITIAL REVIEW OF PROPOSALS

Any proposer determined non-responsible or any proposal determined non-responsive will not be evaluated further. The proposer will be notified of a non-responsible or non-responsive determination.

Responsive
In order for a proposal to be responsive:

- ALL required forms listed above shall be signed and included with proposal;
- Proposal shall be received prior to the RFP opening date at the address listed on the cover page;
- Proposal shall respond to the entire scope of service and performance requirements as requested.

Responsible
In order for a proposal to be responsible, the proposer shall be in good financial standing with the Texas Comptroller of Public Accounts.

V. COMPETITIVE SELECTION / EVALUATION

A. This is a NEGOTIATED procurement and as such, award will not necessarily be made to the offeror submitting the lowest priced proposal. Award will be made to the firm submitting the best responsive proposal satisfying AISD’s requirements, price and other factors considered. Consistent with state law and district policy, this RFP does not commit the district to award a contract. The district reserves the right to accept or reject any or all proposals and/or award in whole or in part any proposal if the district determines it is in the best interest of the district to do so.

B. The district anticipates that the evaluation process may include multiple levels of evaluation, as for example, but not limited to:

Phase 1: Initial review of the proposal by the district’s evaluation team.
Phase 2: Interviews and/or presentations of top proposals from Phase 1, followed by administrative review of finalist(s) and award recommendation.

**PHASE 1**

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<tr>
<th>Points</th>
<th>Item</th>
<th>Detailed Description</th>
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<tr>
<td>40 Points</td>
<td>Proposed Plan &amp; Products</td>
<td>The adequacy and completeness of the plan offered addressing the Scope of Service. Quality of items as well as their ability to meet specifications and sustainability requirements and preferences.</td>
</tr>
<tr>
<td>30 Points</td>
<td>Proposer's Capabilities</td>
<td>The demonstrated ability of the proposer to provide services, including references.</td>
</tr>
<tr>
<td>30 Points</td>
<td>Financial Proposal</td>
<td>Start-up costs, fixed product costs including long-term cost to the District to acquire the goods or services. As well as rebate incentives to determine best value.</td>
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**PHASE 2 (optional)**

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<th>Points</th>
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<th>Detailed Description</th>
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<tr>
<td>20 Percent</td>
<td>Phase 1 Total</td>
<td>The Proposed Plan, Proposers Capabilities, Proposed Products, Financial Proposal</td>
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<tr>
<td>40 Points</td>
<td>Interview / Presentation</td>
<td>The extent to which the goods or services meet the District’s needs.</td>
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<tr>
<td>15 Points</td>
<td>Proposer's References</td>
<td>The reputation of the Proposer and of the Proposer’s goods and services.</td>
</tr>
<tr>
<td>25 Points</td>
<td>Best and Final Offer</td>
<td>Purchase price including long-term cost to the District to acquire the goods or services.</td>
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C. The committee evaluating the proposals submitted in response to this RFP may require any or all proposers to give an oral presentation in order to clarify or elaborate on their proposal as well as to provide a demonstration. Upon completion of oral presentations or discussions, proposers may be requested to revise any or all portions of their proposals and submit a best and final offer (BAFO) for consideration.

D. If the district determines that additional evaluation steps are required to determine the best value between Proposers, the district reserves the right to consider any or all of the following additional criteria; the proposed price, proposer’s experience, references and record for responsibility, or any other relevant factor that the district deems necessary to determine best value.
VI. **SCOPE OF SERVICE AND PERFORMANCE REQUIREMENTS**

**Term**

The agreement(s) resulting from this solicitation will be in effect for an initial term of 40 months from the date of award by the Board of Trustees, or such date established by the agreement. The parties, by mutual consent, may renew the agreement for up to two (2) additional 1-year periods. Any contractual agreements may be terminated by AISD by written notice to this effect sent to the Vendor at least sixty days prior to the date of cancellation. AISD reserves the right to reject any or all proposals and to waive all formalities in the RFP process. In the event of an award under this RFP, you will be extended an Agreement for execution. Please review all provisions and identify any exceptions or suggested additions in your proposal.

**Background**

AISD employees face the same emotional problems prevalent in society today. In some cases, these problems affect the employees’ health, effectiveness on the job, and work attendance. Specific problems facing AISD employees include but are not limited to, financial, drug and alcohol, mental health, death in family, illness of an elder relative or child, and the pressures and stresses of balancing work and family responsibilities.

The function of the Employee Assistance Program (EAP) is to see to the emotional, mental and psychological health of AISD employees and their household members by providing access to outside counseling and referrals to appropriate community and professional resources for help resolving problems.

The following describes the service and performance requirements that the selected external Employee Assistance Program (EAP) Contractor will be required to perform. Failure to address or to fully describe capabilities to accomplish all elements of this section will result in a loss of evaluation points.

**Base Employee Assistance Program services to be provided to Austin Independent School District (AISD) employees and their household members is as follows:**

**A. Confidential Assessment and Counseling Services**

- Provide assistance to AISD employees and their household members when appropriate, in dealing with problems associated with, but not limited to, stress, family, work, grief, smoking cessation, alcohol and/or substance abuse, marriage & divorce, depression, anxiety, parent-child relationships, child/spouse abuse, aging, eldercare, eating disorders, financial and legal problems, gambling, conflict resolution, serious illness/death of a family member, and mental & emotional health issues at no cost to the participants or the participant's insurance carrier.

- The Contractor will provide face to face counseling for short-term problem resolution, a minimum of four (4) sessions per problem, per eligible participant, per contract year. Contractor will make reasonable efforts to ensure that direct counseling services will be available to all participants.
throughout AISD at locations geographically convenient and easily accessible by the participants. Telephone consultations will not be counted as counseling sessions. Participants are required to complete counseling on the initial issue prior to starting counseling with a different counselor.

- Therapy sessions will occur on a face to face basis unless extenuating circumstances exist. The contractor may offer tele-video as an option for counseling sessions but must also offer face-to-face. Telephone consultations will not be counted as counseling sessions.
- The contractor will assist with provider placement for the participant(s) and confirm a scheduled appointment with a provider no more than 48 hours after participant’s initial contact.

- Licensed professional EAP counselors, experienced in providing EAP services, shall deliver confidential, in-person short-term, solution focused assessment and counseling sessions for employees and their family members who are experiencing life problems of any kind. These sessions shall be conducted in safe, private, and confidential offices. The program should provide guidance and counseling to help employees overcome their problems and restore them to full job effectiveness.

B. Referrals

- The EAP shall assist with referrals for long-term or specialized care based on assessed employee need and preferences, recommended treatment and financial resources. When possible, the EAP shall work to connect AISD employees to long-term treatment that is in-network with that participant’s health coverage.

- Referrals shall be made if more extensive counseling is needed, and the number of personal counseling sessions is exhausted.

- Contractor shall, as needed, refer employees to outside professionals including but not limited to: psychiatrists/psychologists, psychotherapists, social workers, family counselors, other medical and/or health practitioners, legal and/or financial counselors. All fees incurred by the participant at the referred entity or provider will be the responsibility of the participant.

- EAP provider will consistently update call center to allow for referrals to local community outreach programs.

C. 24-Hour Crisis Telephone Response

- Professional EAP counselors shall provide live, immediate crisis telephone counseling 24 hours per day, seven days per week, and 365 days per year. A toll-free number shall be provided.

- Such referrals should then result in reasonably expeditious appointments with credentialed therapists that are knowledgeable and skilled in issues associated with the presenting problem.
D. **Critical Incident Stress Debriefing (CISD)**

- Contractor shall provide an unlimited number of CISD sessions consisting of no more than ten (10) hours per incident. Onsite assistance shall be provided in a timely fashion for emergencies.

- Contractor will provide critical incident stress group debriefings and/or one-to-one employee counseling on-site at the District’s work location upon request in the event of a critical incident/traumatic event. Licensed professional EAP counselors shall be available in sufficient numbers and in appropriate locations to deliver both urgent and non-urgent services in a timely manner. Urgent requests for services shall be met within 24 hours and non-urgent request within three business days.

- All CISDs will be initiated by the District’s EAP Coordinator or a designated proxy if the District’s EAP coordinator is unavailable. The contractor will provide all confirmation details associated with but not limited to the confirmed counselor name and contact information, to the EAP Coordinator or designated proxy.

E. **Legal and Financial Services**

- Contractor shall provide legal and financial services and referrals including, but not limited to: budgeting, tax planning, retirement planning, debt management, investments, financial planning, family law, domestic relations, consumer issues, identity theft, fraud resolution, personal injury, estate planning, wills, and probate.

F. **Case Management Services**

- Contractor will provide case management follow-up services for participants who are referred by the workplace as a Procedural Referral; for clients who are considered to be in crises (suicidal, homicidal or domestic violence); or who contact Contractor for help with a substance problem. Case management services will continue for as long as warranted for the presenting issue subject to participant’s eligibility for services.

G. **Web based Services**

- Contractor will provide access for web-based services which gives participants free access to explore articles, videos, eLearning modules, assessments, and tips and tools on balancing work and family life. Web based services are currently white labeled and is the district’s preference to remain so.

H. **Work-Life Balance**

- Contractor will provide resources ranging from counseling to community referrals for work-life balance issues including, but not limited to: prenatal
care, new baby care, child care, parenting, emergency care, summer care, elder resources, disaster relief, pet care, at-risk/high-risk adolescents, fitness, tobacco cessation, weight management, stress management, and self-care.

I. EAP Communication/Awareness Materials

- Contractor shall provide a variety of printed materials, in English and Spanish (e.g. posters, brochures, wallet cards, etc.), online services, newsletter, to maximize awareness in the workplace and promote easy access to EAP services and support. These materials are also currently white labeled.

- Contractor shall provide/advise on a transition plan for services that are in progress at the time of change-over from the existing employee assistance provider to a new service provider, if applicable.

J. Management Communication and Consultation/ Manager Referrals

- Contractor shall provide trainings/ consultations to AISD supervisors as needed regarding the management and referral to the program of employees with job performance or behavioral/medical problems.

- Contractor will provide AISD Supervisors with session completion updates for an employee that is referred to the management referral program.

- The EAP shall provide on and offsite assistance, as needed, with management referrals for employees involved in workplace conflicts, return-to-work conferences and other identified needs of the workplace.

- Contractor shall provide comprehensive organizational development training, as requested, for managers and supervisors regarding use of effective management skills in the workplace. Training may be delivered in a variety of formats, and cover topics such as effective supervisory skills, performance-based identification of troubled employees, the EAP management referral process, and consultation with the EAP.

K. Training Hours

- Contractor will provide training seminars/classes for employees, supervisors/managers, Human Resource staff, etc.

  - Please indicate proposed training class length
  - Please indicate the maximum of individuals eligible to take a class.
  - Please indicate additional costs for sessions/classes.

L. Deliverables / Reports

- The contractor will be required to provide and review annual and quarterly utilization reports to the Austin ISD as follows:
On a quarterly and annual basis, contractor shall provide comprehensive, user-friendly EAP utilization and activity reports

On a Quarterly basis, contract shall provide customer satisfaction data

Annual and quarterly utilization, statistical and customer satisfaction reporting

VII. APPENDICES AND ATTACHMENTS

- Appendices (Documents included within this proposal):
  - Appendix 1 – Purchasing and Acquisition Vendor Relations Policy CHE-LOCAL

- Attachments (Separate documents available to download):
  - Attachment 1 – 2020 EAP RFP Questionnaire
  - Attachment 2 – 2018_2019 Revive EAP Resources for Living Annual Executive Summary