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# **Request for Proposal**

Request for Proposals for  
Diabetes Management Services

RFP # - 21-023



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Wake County, North Carolina  
Procurement Services  
P.O. Box 550  
Raleigh, North Carolina 27602

Proposals are due:  
**April 27<sup>th</sup> by 3pm EST**

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# 1 Introduction

## 1.1 Introduction

Wake County, North Carolina (“The County”) is seeking proposals from qualified providers to operate the County’s diabetic management services.

## 1.2 County Background

Demographics. Wake County is the 2<sup>nd</sup> most populous county in North Carolina. The County consists of 12 municipalities and includes Raleigh, the County seat and State capital. The County’s population is over 1 million residents. The County’s General Fund budget is currently \$1.14 billion and the County employs approximately 4,000 benefit eligible employees.

Fiscal and Plan Years. Wake County operates on a July 1 – June 30 fiscal year. The benefits plan year is January 1 – December 31.

## 1.3 Wake County Employee Health and Wellness Programs

Wake County has been very proactive in developing and supporting health and wellness programs to improve health for employees and their dependents. The County introduced Living Great @ Wake (“LG@W”) in 2016 to promote a culture of health and well-being and has continued to expand LG@W’s programs and outreach for this important mission.

The mission of the LG@W program is to improve the health and well-being of Wake County employees and their families through education, tools and programs that support overall health and well-being thereby resulting in improved productivity, morale, and health care cost. The program encourages employees, retirees and their family members live lives that are physically fit and healthy, emotionally strong, financially secure and socially fulfilling.

Some of the keystone programs included within our LG@W philosophy are:

- “Know Your Numbers” which includes a Biometric Screening and Health Risk Assessment
- Diabetes Education and Management
- Tobacco Cessation Program
- Fitness Challenges and Events
- Health and Lifestyle Coaching

## 1.4 Scope of Diabetes Management

The County wishes to receive proposals from qualified diabetes management vendors to deliver the services listed in the matrix below. The first column, “Current”, shows the services currently delivered by Wake County’s diabetes management vendor. The second column, “Required” shows services the County has decided are “must-haves” for the diabetes management program and bidders are required to submit proposals and pricing that include all of these services. The third column labeled “Optional” are services that are of interest to the County, and

you are invited to propose solutions/pricing and/or discuss your capabilities in these areas based on your evaluation of the County's demographics, health risks, scale, and other variables. For Optional services, please be sure to itemize services, staffing, and costs separately from the required must-haves in your proposal.

Proposals will be received by Wake County Government at the time and place noted on the cover page of this document. At that point, Wake County will close the receipt of proposals and begin the evaluation process. The only information that will be released will be the names of the respondent(s). No other information will be disclosed, except as required by the evaluation process, until a contract is awarded.

Current	Required	Optional
Provision of cellular glucometer	X	
Provision of testing supplies (test strips, lancets, etc.)	X	
Real-time, 24/7 monitoring of, and live outreach to, patients with abnormal glucose readings by a clinician or Certified Diabetes Care and Education Specialist (CDCES)	X	
Live personalized health coaching from a clinician or CDCES	X	
Online portal and smartphone application where members can access, share, and track their results	X	
Proactive educational outreach via text and/or email	X	
Ability to provide member-level participation reporting to the County's benefits partners, including their medical carrier, employee health center, and benefit's broker	X	
Services and materials provided in Spanish		X
Ability to support type I diabetes		X
Ability to support gestational diabetes		X

The Scope of Services above reflects required and specific optional services of potential interest to the County. Please feel free to recommend any additional services, and associated costs, not included that you believe would be a good fit for the County's objectives.

### 1.5 Current Medical Enrollments

The County's current 2021 employee/spouses and retiree/spouse medical plan enrollments and eligible for the diabetes management program are summarized below:

Premium Plan (\$1,000 deductible)	Enrolled
• Employees	1,737
• Spouses	211
• Pre-65 Retirees	219
• Pre-65 Retiree Spouses	43
• Post-65 Retirees	330
• Post-65 Spouses	28
• <b>Total Enrolled</b>	<b>2,568</b>
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<b>Standard Plan (\$2,000 deductible)</b>	<b>Enrolled</b>
• Employees	1,855
• Spouses	306
• Pre-65 Retirees	268
• Pre-65 Retiree Spouses	40
• Post-65 Retirees	538
• Post-65 Spouses	24
• <b>Total Enrolled</b>	<b>3,031</b>
<b>CDP w/HSA (\$2,000 deductible)</b>	<b>Enrolled</b>
• Employees	211
• Spouses	27
• Pre-65 Retirees	n/a
• Pre-65 Retiree Spouses	n/a
• Post-65 Retirees	<b>n/a</b>
• Post-65 Spouses	<b>n/a</b>
• <b>Total Enrolled</b>	<b>238</b>
<b>Total Enrollment in Plans</b>	<b>5,837</b>

## 1.6 Current Medical Benefits

The County offers three self-funded medical plans, the Premium, Standard and CDP w/ HSA Plans, which are administered by CIGNA.

The Standard Plan has individual/family calendar year deductibles of \$2,000/\$4,000, \$30 acute care copay, \$50 specialist copay, \$50 urgent care copay, and \$300 ER copay then 70%.

The Premium Plan has calendar year deductibles of \$1,000/\$2,000, \$20 acute care copay, \$40 specialist copay, \$50 urgent care copay, and \$300 ER copay then 70%.

The CDP Plan has calendar year deductibles of \$2,000/\$4,000, acute care, specialist, urgent care and ER are all subject to deductible then the member is responsible for 20% up to \$5,000/\$10,000. Wake County provides employees with \$750 in their H.S.A. for single enrollment and \$1,250 for employee plus dependents enrollment.

We have provided benefit summaries for these plans in the attachments to the RFP.

## 1.7 Diabetes Management Utilization & Data

Attachment 5.3 – Diabetes Management Utilization Overview

## 1.8 General Bidding Requirements

When responding to this RFP, please follow all instructions carefully. Please submit proposal contents according to the outline specified and submit documents according to the instructions.

Failure to follow these instructions will be considered a non-responsive proposal and may result in immediate elimination from further consideration.

By submitting a proposal, Proposers acknowledge that:

- 1.8.1 The County reserves the right to reject any or all proposals if it determines that select proposals are not responsive to the RFP. The County reserves the right to reconsider any proposal submitted at any phase of the procurement. It also reserves the right to meet with select Proposers at any time to gather additional information.
- 1.8.2 Proposals will be received by Wake County Government at the time noted on the cover page of this document. At that point, Wake County will close the receipt of proposals and begin the evaluation process. The only information that will be released will be the names of the respondent(s). No other information will be disclosed, except as required by the evaluation process, until a contract is awarded.

Wake County, solely at its option, may disclose the name(s) of any firms or companies being considered or elevated during the process. Proposers are not to contact any county staff or elected official in reference to the process due to the nature of a competitive environment and to protect the integrity of the RFP process. As information becomes available and is relevant for release, that information will be shared with respondents.

Wake County, solely at its option, may disclose the name(s) of any firms or companies being considered or elevated during the process. Proposers are not to contact any county staff or elected official in reference to the process due to the nature of a competitive environment and to protect the integrity of the RFP process. As information becomes available and is relevant for release, that information will be shared with respondents.

## 2 General Submittal Requirements

### 2.1 Proposal Contact

This RFP and any subsequent action taken as a result thereof are issued by Marsh & McLennan Agency (MMA) on behalf of the County. Proposal responses should be directed to MMA, as outlined below. In regards to this RFP and subsequent procurement process, vendors shall make NO CONTACTS, either written or verbal, with any Wake County employee, staff member, Board of Commissioner members, during the period beginning with the issuance of this document through approval of award unless authorized by the proposal contact. **Any attempt by a Proposer to contact or influence a member or members of the aforementioned will result in the immediate disqualification of the Proposer from award for items or services on this RFP.**

Proposal Contact	County Representative
Meegan Broll Marsh & McLennan Agency 2301 Sugar Bush Road, Suite 600 Raleigh, NC 27612 meegan.broll@marshmma.com 919-987-4160	Tom Wester Wake County Finance / Procurement Services Wake County Justice Center, 2 <sup>nd</sup> Floor, Rm 2900 301 S. McDowell Street Raleigh, NC 27602 twester@wakegov.com 919-856-6153

### 2.2 Proposal Submittal Requirements

Proposers are required to prepare their proposals in accordance with the instructions outlined in this part and elsewhere in this RFP.

Proposers must submit their official responses **by email**. MMA must receive proposals no later than **3 pm ET on April 27<sup>th</sup>, 2021**. No extensions can be provided. The official determination for whether the RFP has been received on time is the time stamp receipt on the email. The County will not be held responsible for the failed delivery of any proposal response.

**Mailing Address:**

Meegan Broll  
 Marsh & McLennan Agency  
 2301 Sugar Bush Road, Suite 600  
 Raleigh, NC 27612  
 Meegan.Broll@marshMMA.com with CC: to Rebecca.McCanta@marshMMA.com  
 919-987-4160

It is solely the Proposer's responsibility to: (1) Ascertain that they have all required and necessary information, documents and addenda, prior to submitting a response; (2) Ensure that the response is received at the correct location and time. Late responses, regardless of delivery means, will not be accepted. Fax responses will not be accepted.

**2.3 Proposer Expenses**

The County will not be responsible for any expenses incurred by any Proposer in the development of a response to this Request for Proposal or any other activities associated with this procurement including but not limited to any onsite (or otherwise) interviews and/or presentations, and/or supplemental information provided, submitted, or given to Wake County and/or its representatives. Further, the County shall reserve the right to cancel the work described herein prior to issuance and acceptance of any contractual agreement/purchase order by the recommended Proposer even if the Board of Commissioners has formally accepted a recommendation.

**2.4 Interpretations, Discrepancies, and Omissions**

Should any Proposer find discrepancies, omissions or ambiguities in this RFP, the Proposer must request in writing, within seven days of receipt of proposal, an interpretation from proposal contact listed in Section 2.2.

Any clarifications requiring addenda to the RFP will be available by Responses will be posted on the Wake County Website at [www.wakegov.com](http://www.wakegov.com)

The issuance of a written addendum is the only official method by which interpretation, clarification or additional information will be given by the County. Only requests answered by formal written addenda will be binding. Oral and other interpretations or clarification will be without legal effect. It is the County's intent not to issue any addenda after April 6<sup>th</sup>, 2021.

**2.5 Tentative Schedule**

Date	Event
March 22 <sup>nd</sup> , 2021	Distribution of RFP
March 29 <sup>th</sup> , 2021	Addenda Requests and General Clarifications and Questions Due
April 6 <sup>th</sup> , 2021	Responses to Addenda Requests Posted on Website
April 27 <sup>th</sup> , 2021	Electronic Due at 3PM ET
TBD	Finalist Interviews
June 7 <sup>th</sup> , 2021	Selection and Notification of Vendors
August 16 <sup>th</sup> , 2021	Approval by Board of Commissioners
January 1 <sup>st</sup> , 2022	Contract Begins

**2.6 General Clarifications and Questions**

The County will also make a good faith effort to provide other data or attachments, if the request will further clarify the project's scope. All requests for further information shall be received by the



County by March 29<sup>th</sup>, 2021 before 3:00 PM EST. A copy of all answers and further clarifications provided by the County to those making inquiries will be posted as an addendum to the RFP on the County's website on April 6<sup>th</sup>, 2021 by 3:00 PM EST.

## **2.7 Finalists and Interviews**

From the proposals received, the Group will identify a short-list of finalists. The finalists will be expected to make a presentation to and respond to questions from the Group. Additional information regarding the content of the presentation will be provided to the selected finalists.

## **2.8 Proposal Evaluation Criteria**

The County's key decision criteria in awarding the contract for diabetes management will be based on the following considerations:

- Delivering high quality, evidence-based medical services to the County's employees and dependents.
- Proactive, technology-driven customer service capabilities with a sincere dedication to engagement and satisfaction.
- Flexibility in tailoring services to the County's culture, population, and constraints.
- Creative, outside-the-box thinking and bringing fresh ideas to the County's employee health centers.
- Meeting the County's general and specific contracting requirements.
- Optimal ROI/Value for the County.

## **2.9 Award**

Wake County reserves the right to award a contract, based on initial offers received from Proposers, without discussion and without conducting further negotiations. Under such circumstance, the acceptance of a proposal by the County shall be deemed to be an acceptance of an offer and that such acceptance will be binding upon both parties. The County may also, at its sole discretion, have discussions with those Proposers that it deems to fall within a competitive range. The County may enter into negotiations separately with such Proposers. Negotiations with a Proposer may continue with a Proposer that the County has tentatively selected to award a contract to. The County shall not be deemed to have finally selected a Proposer until a contract has been successfully negotiated and signed by both parties.

## **2.10 Non-disclosure of County Information**

The Proposer and its agents shall treat all data and information gathered by the Proposer and its agents, including this RFP and all reports, recommendations, specifications, and data as confidential. The Proposer and its agents shall not disclose or communicate the aforesaid matters to a third party or use them in advertising, propaganda, and/or in another job or jobs, unless written consent is obtained from the County.

## **2.11 Retention of Proposer Material**

Any and all information submitted in conjunction with this RFP and the evaluation process will not be returned to the respondent.



## **3 General Terms and Conditions**

### **3.1 Certification**

The Proposer hereby certifies that it has carefully examined this Request for Proposal and the Proposer certifies that it understands the scope of the work to be done and that the Proposer has knowledge and expertise to provide the scope of the work. By signature on the response to the RFP, the Proposer certifies that its proposal is made without prior understanding, agreement, or connection with any corporation, firm or person submitting a proposal for the same materials, supplies, or equipment, and is in all respects fair and without collusion or fraud, so that all proposals for the purchase will result from free, open and competitive proposing among all vendors. Further, the Proposer certifies that it understands that collusive bidding/proposing is a violation of Federal law and can result in fines, prison sentences, and civil damage awards.

### **3.2 Conflict of Interest**

By submission of a response, the Proposer agrees that at the time of submittal, it: (1) has no interest (including financial benefit, commission, finder's fee, or any other remuneration) and shall not acquire any interest, either direct or indirect, that would conflict in any manner or degree with the performance of Proposer's services, or (2) will not benefit from an award resulting in a "Conflict of Interest." A "Conflict of Interest" shall include holding or retaining membership, or employment, on a board, elected office, department, division or bureau, or committee sanctioned by and/or governed by Wake County. Proposers shall identify any interests, and the individuals involved, on separate paper with the response and shall understand that the County, in consultation with legal counsel, may reject their proposal.

### **3.3 Assignment**

No assignment of the Proposer's obligations or the Proposer's right to receive payment hereunder shall be permitted without prior consent of the County. The Proposer may not sell, assign, transfer or convey the contract resulting from this RFP, in whole or in part, without the prior written approval from the County.

### **3.4 Indemnification**

The Contractor will indemnify and hold the County harmless from any and all liability, expense, judgment, suit, or cause of action for personal injury, death, or direct damage to tangible property which may accrue against the County to the extent it is caused by the negligence of Contractor, its subcontractors, or their employees or agents, while performing duties under this Agreement, provided that the County gives the Contractor prompt, written notice of any such claim or suit. The County shall cooperate with Contractor in its defense or settlement of such claim or suit. This section sets forth the full extent of the Contractor's general indemnification of the County from liabilities that are in any way related to Contractor's performance under this Agreement.

### **3.5 Independent Contractor**

It is understood that in the performance of any services herein provided, the Proposer shall be, and is, an independent contractor, and is not an agent or employee of the County and

shall furnish such services in its own manner and method, except as required by this contract. Further, the Proposer has, and shall retain the right to exercise full control over the employment, direction, compensation, and discharge of all persons employed by the Proposer in the performance of the services hereunder. The Proposer shall be solely responsible for, and shall indemnify, defend, and save the County harmless, from all matters relating to the payment of its employees, including compliance with Social Security, withholding, and all other wages, salaries, benefits, taxes, exactions, and regulations of any nature whatsoever.

### **3.6 Payment**

Payment for the rendered services pursuant to the Agreement resulting from this RFP shall be made in amounts and at times set forth in the Agreement and shall be made upon receipt of original invoice(s) in accordance and in conformity with payment dates for bills and claims as established by the County. Prior to payment, the Contractor must submit an original dated itemized invoice of services rendered. Accommodations for self-bill can be considered (Photographs or facsimiles of invoices will not be accepted.) Any reimbursement for expenses as allowed in the Agreement that are included in the invoice(s) must be supported with attached original billings for such expenses.

### **3.7 Insurance**

Proposers shall obtain, at their sole expense, all insurance required in the following paragraphs and shall not commence work until such insurance is in effect and certification thereof has been received by Wake County's Risk Manager. Workers' Compensation Insurance, with limits for Coverage A Statutory-State of North Carolina and Coverage B Employers Liability \$500,000 each accident, disease policy limit and disease Each Employee.

Commercial General Liability - Combined single limits of no less than \$1,000,000 each occurrence and \$2,000,000 aggregate. This insurance shall include Comprehensive Broad Form Coverage including contractual liability.

Commercial Automobile Liability, with limits of no less than \$500,000 Combined Single Limit for bodily injury and property damage. Evidence of commercial automobile coverage is only necessary if vehicles are used in the provision of services under this Agreement and/or are brought on a Wake County site.

Professional Liability (Errors and Omissions) with limits of no less than \$3,000,000 each occurrence and \$5,000,000 aggregate.

All insurance companies must be licensed in North Carolina and be acceptable to the County's Risk Manager. Insurance Policies, except Workers' Compensation, shall be endorsed (1) to show Wake County as additional insured, as their interests may appear and (2) to amend cancellation notice to 30 days, pursuant to North Carolina law. Certificates of insurance shall be signed by a licensed North Carolina agent and be amended to show "thirty (30) days' notice of change or cancellation will be given to the Wake County Risk Manager by certified mail." If an "ACCORD" Insurance Certificate is used, the words "endeavor to" and "but failure to mail such notice shall impose no obligation or liability of any kind upon the company" in the "cancellation" paragraph of the form shall be deleted.

Copies or originals of correspondence, certificates, endorsements or other items pertaining to insurance shall be sent to:

Wake County Risk Manager  
Room 900 - WCOB  
P. O. Box 550  
Raleigh, NC 27602

If the Proposer does not meet the insurance requirements of the specifications, alternate insurance coverage satisfactory to Wake County may be considered.

### **3.8 Governing Law**

This RFP and any contract resulting therefrom shall be governed by and construed according to the laws of the State of North Carolina. Should any portion of any contract be in conflict with the laws of the State of North Carolina, the State laws shall invalidate only that portion. The remaining portion of the contract(s) shall remain in effect.

### **3.9 Confidential Information/Public Records Law**

INFORMATION SUBMITTED IN RESPONSE TO REQUESTS FOR BIDS, PROPOSALS, AND OTHER PROCUREMENT METHODS SUBJECT TO PUBLIC RECORDS LAW  
Wake County is subject to North Carolina's Public Records Act located in Chapter 132 of the North Carolina General Statutes. As a result, information submitted to and received by Wake County in response to a Request for Proposal/Request For Bid/Request For Quote/Request for Qualifications, or any other procurement method (collectively "Procurement Process"), is considered public record and may be released for public inspection after the contract award, or as otherwise permitted under NCGS § 143, without further notice to the proposer. The County does not intend to elicit confidential or trade secret information in response to a Procurement Process and assumes no responsibility for the submission of such information. Wake County reserves the right to share any information submitted in response to a Procurement Process with any person(s) or firm(s) involved in the review and evaluation phase of the Procurement Process.

#### **CONFIDENTIAL OR TRADE SECRET INFORMATION**

If a proposer nonetheless submits information in a bid proposal or other response to a Procurement Process and it considers such information to be confidential, then all four requirements of NCGS 132-1.2 "Confidential Information" must be met for the County to consider withholding the information from public inspection in response to a public records request. **Among other legal requirements, information deemed to be "confidential" or "trade secret" by proposer must be clearly marked as such on the face of the document(s) at the time of the initial disclosure/submittal of RFP.** In addition, although not required by law, Wake County requests that any proposer who submits a proposal or response containing any such designation of confidentiality also submit a second copy of the proposal or response with the respective page(s) or section(s) redacted. The County will not agree to withhold an entire proposal or response from public inspection, thus proposers should refrain from including blanket restrictions on disclosure or all-encompassing claims of confidentiality.

When a public records request is made for information contained in or attached to a proposal or response that has been clearly marked as "trade secret" or "confidential" upon its submission, Wake County may, in its discretion and without further notice, release the redacted copy of the proposal or response to the requester if one has been previously submitted. Otherwise, the proposer will be notified of the request and given an opportunity to provide within a reasonable period a written explanation of the basis for claiming protection under N.C.G.S. 66-152 and N.C.G.S. 132-1 and/or a redacted proposal or response. The County shall make the final determination on release of the

information. Should any civil action be brought against the County in an effort to compel or prevent the disclosure of information contained in a proposal or response that is deemed confidential by a proposer, the proposer may participate at its own expense; and by deeming any information in a proposal or response confidential, proposer further agrees to indemnify and hold harmless the County for and against any costs incurred by the County as a result of such litigation, including but not limited to fees or expenses arising out of N.C.G.S. 66-153 and N.C.G.S. 132-9.

### **3.10 Compliance with Laws and Regulations**

Proposer must comply with all applicable State and Federal Laws. In the event any Governmental restrictions may be imposed which would necessitate alteration of the material, quality, workmanship or performance of the items offered on this proposal prior to their delivery, it shall be the responsibility of the successful Proposer to notify Wake County at once, indicating in their letter the specific regulation which required such alterations. The County reserves the right to accept any such alterations, including any price adjustments occasioned thereby, or to cancel the contract.

### **3.11 Acceptance**

Submission of any proposal indicates a Proposer's acceptance of the conditions contained in this RFP unless clearly and specifically noted otherwise in the proposal.

Furthermore, the County is not bound to accept a proposal on the basis of lowest price, and further, the County has the sole discretion and reserves the right to cancel this RFP, and to reject any and all proposals, to waive any and all informalities and/or irregularities, or to re-advertise with either the identical or revised specifications, if it is deemed to be in the County's best interests to do so. The County reserves the right to accept or reject any or all of the items in the proposal, and to award the contract in whole or in part and/or negotiate any or all items with individual Proposers if it is deemed in the County's best interest. Moreover, the County reserves the right to make no selection if proposals are deemed to be outside the fiscal constraint or not in the best interest of the County.

### **3.12 Additional Services**

The County reserves the right to negotiate additional services with the Vendor at any time after initial contract award.

### **3.13 E-Verify**

*To ensure compliance with the E-Verify requirements of the General Statutes of North Carolina, all contractors, including any subcontractors employed by the contractor(s), by submitting a bid, proposal or any other response, or by providing any material, equipment, supplies, services, etc, attest and affirm that they are aware and in full compliance with Article 2 of Chapter 64, (NCGS64-26(a)) relating to the E-Verify requirements.*

### **3.14 Iran Divestment Act**

By signing this agreement; accepting this contract/purchase order; or submitting any bid, proposal, etc., vendors and contractors certify that as of the date of execution, receipt, or

submission they are not listed on the Final Divestment List created by the NC Office of State Treasurer pursuant to *NCGS 147 Article 6E, Iran Divestment Act*, Iran Divestment Act Certification. Vendors and contractors shall not utilize any subcontractor that is identified on the Final Divestment List.

In addition:

Any organization defined under NCGS 147-86.80(2), Divestment from Companies Boycotting Israel, shall not engage in business totaling more than \$1,000 with any company/business, etc. that boycotts Israel. A list of companies that boycott Israel is maintained by the NC Office of State Treasurer, pursuant to NCGS 147-86.81(a)(1). Any company listed as boycotting Israel is not eligible to do business with any State agency or political subdivision of the State.

### **3.15 Federal Uniform Guidance**

If the source of funds for this contract is federal funds, the following federal provisions apply pursuant to 2 C.F.R. § 200.326 and 2 C.F.R. Part 200, Appendix II (as applicable):

Equal Employment Opportunity (41 C.F.R. Part 60); Davis-Bacon Act (40 U.S.C. 3141-3148); Copeland "Anti-Kickback" Act (40 U.S.C. 3145); Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708); Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387); Debarment and Suspension (Executive Orders 12549 and 12689); Byrd Anti-Lobbying Amendment (31 U.S.C. 1352); Procurement of Recovered Materials (2 C.F.R. § 200.322); and Record Retention Requirements (2 CFR § 200.324)

# 4 Detailed Submittal Requirements

## 4.1 Proposal Format

Proposers shall prepare their proposals in accordance with the instructions outlined in this section. Each Proposer is required to submit the proposal in a sealed package. Proposals should be prepared as simply as possible and provide a straightforward, concise description of the Proposer's capabilities to satisfy the requirements of the RFP. Utmost attention should be given to accuracy, completeness, and clarity of content. All parts, pages, figures, and tables should be numbered and clearly labeled. The proposal should be organized into the following major sections:

<u>PROPOSAL SECTION</u>	<u>TITLE</u>
	Title Page
	Letter of Transmittal
	Table of Contents
1.0	Executive Summary
2.0	Scope of Services
3.0	Company Background
4.0	Client References
5.0	Cost Proposal
6.0	Proposal Questionnaire

Instructions relative to each part of the response to this RFP are defined in the remainder of this section. Response information should be limited to pertinent information only. Marketing and sales type information is not to be included.

## 4.2 Executive Summary

Executive Summary (Proposal Section 1.0) This section of the response should be limited to a brief narrative summarizing the Proposer's proposal. The executive summary shall, at a minimum, include an identification of the proposed project team, responsibilities of the project team, and a summary of the proposed services.

This section should highlight aspects of the proposal that make it superior or unique in addressing the needs of the County. Please note that the executive summary should identify the primary engagement contact. Contact information should include a valid e-mail address, fax number, and a telephone number.

## 4.3 Scope of Services

(Proposal Section 2.0) This section of the response should include a general discussion of the Proposer's overall understanding of the project and the scope of work.



As the County is seeking proposals from qualified providers to manage the diabetic population, the Proposer should outline a recommended approach, critical tasks and timeline for achieving the County's objectives in Section 1.2 based on the Proposer's experience with organizations similar to the County and the basis for the approach.

The responses should be specific and identify the anticipated role of the County during each stage of the process including implementation, employee education, communication and ongoing administration.

Proposers are encouraged to provide examples of services provided to their clients and the impact of those services. It is not necessary to name the client; however, it is necessary to provide specifics such as what strategies were used and what success these items had.

#### **4.4 Company Background and Engagement Team Experience**

(Proposal Section 3.0) Each proposal must provide the following information about the submitting Proposer's company, so that the County can evaluate the Proposer's stability and ability to support the commitments set forth in response to the RFP. The County, at its option, may require a Proposer to provide additional support or clarify requested information.

##### 4.4.1 Company Background

- a. What is the legal name of your organization, and the address and telephone number for your corporate/primary business office?
- b. Please provide names and titles for your senior management (c-suite).
- c. What is the legal name of the organization who owns the majority interest in your company (if different) and what is their address and telephone number?
- d. Are you operating as a public, private or non-profit corporation or other type of licensed entity? Please specify.
- e. How many independent contractors do you have in your worksite business? Please provide numbers by major job class.
- f. Does your organization operate any major business segments other than worksite health? If yes, please provide a brief summary of other businesses.
- g. What year did your organization first offer worksite primary care services to employers?
- h. Please provide a copy of your financial ratings, if possible.
- i. Please provide a copy of your organization's most recent annual financial report.

4.4.2 Engagement Team Experience

- a. What is the name and title of the Account Executive who would have overall responsibility for the Wake County account? Please provide a professional bio for this individual.
- b. What other key functions would have an assigned professional to the County's account?
- c. Please provide an organization chart for the Wake County account showing reporting relationships for the County's team and upstream to your senior management group.
- d. Include the résumés of staff that will work on the engagement and provide ongoing client support. If they are working on only certain portions of the project, please indicate this on their résumé.

4.4.3. Professional Liability and Business Insurance

- a. Provide detailed coverage and limit information for all professional and general liability coverages, including tail coverages, which you would provide to the County as part of the contract.
- b. Provide detailed coverage and limit information for all other ancillary coverages you would provide and/or required to operate worksite medical centers in North Carolina (i.e. workers' compensation, theft, auto, property damage, HIPAA breaches).
- c. Please confirm that you can meet the County's basic insurance requirements listed in the general information section of this RFP.
- d. Do you currently have any open professional liability claims pending for worksite health patients? If yes, please summarize the nature and amount of reserves established for each claim. Do you have any such litigation pending in the State of North Carolina?

**4.5 Client References**

(Proposal Section 4.0) The County considers references to be important in its decision to award a contract. Selected organizations may be contacted to determine the quality of work performed and personnel assigned to the plan. The results of the reference check will be provided to reviewers and used in scoring the written proposal. Failure to provide this information will result in the proposal being considered non-responsive.

Please provide a list of references and indicate the number of covered lives, contract period and description of services for each. Also provide at least three clients (current or past within the last 24 months) who we may contact.

References should be clients similar in size and with scope of services similar to those being requested by the County. At least one reference should be a public sector employer. Please give the company name, address and the name and telephone number of the contact person.

	Current Reference #1	Current Reference #2	Current Reference #3
<b>AGENCY NAME</b>			
<b>Contact Name</b>			
<b>Contact Title</b>			
<b>Contact Phone</b>			
<b>Address</b>			
<b>Contract Period</b>			
<b>Number of covered lives</b>			
<b>Description of Services</b>			

Please provide 1 client success story that discusses how you have worked with your client to evolve/enhance/expand worksite services in concert with the client's changing needs.

Also provide three clients who terminated services with your company in the past 24 months prior to the conclusion of the contracted services. If there haven't been three terminations, indicate the ones that have occurred and mark the remaining boxes "No terminated client." References should be clients similar in size to the County. The County reserves the right to ask for additional references.

	Terminated Client #1	Terminated Client #2	Terminated Client #3
<b>Agency Name</b>			
<b>Contact Name</b>			
<b>Contact Title</b>			
<b>Contact Phone</b>			
<b>Address</b>			
<b>Description of Services</b>			
<b>Number of covered lives</b>			
<b>Contract Period</b>			

**4.6 Cost Proposal**

(Proposal Section 5) Proposers must submit an estimate of project costs.

The County reserves the right to contact Proposers on cost and scope clarification at any time throughout the selection process and negotiation process.

**Proposals must be submitted directly from the proposer. No commission is available for payment to an agent/broker either directly or indirectly as a result of this proposal. All financial quotes must be net of commissions.**

The County may award a contract based on initial offers received without discussion of such offers. A Proposer's initial offer should, therefore, be based on the most favorable terms available. The County may, however, have discussion with those Proposers that it deems to fall within a competitive range. It may also request revised pricing offers from such Proposers, and make an award and/or conduct negotiations thereafter.

The County is asking Proposers to indicate rates and any administrative charges. Identify the assumptions used in determining the calculation

#### **4.7 Proposal Questionnaire**

Attachment 5.1 - Proposers must respond to the questions in this section in accordance with the instructions given in Submitting Requirements.

**We GREATLY appreciate the effort you and your organization has invested in responding to the Wake County RFP. Thank you!**

## **5 Attachment Listing**

- 5.1 WCG Diabetes Management Questionnaire
- 5.2 Member Census Detail
- 5.3 Diabetes Management Utilization Overview
- 5.4 Wake County Wellness Program Background, Philosophy and Health Initiatives
- 5.5 2021 Medical/Pharmacy Benefit Plan Summaries