



## RFP 019-12-0006 Wellness Program Proposal

Proposal Issued – December 20, 2018

Proposal Due – January 24, 2019 2:00 PM

# Town of Mooresville

The Town of Mooresville seeks a strategic partner organization that will administer, operate, manage, and move forward the Town's Employee Wellness Program. The Town requires a wellness program that is run independently from the Town —no employee health or wellness information associated with the program can be stored, managed or collected by the Town staff. The Town requires a program that provides employees who elect to participate a structured process of evaluating, monitoring and improving or maintaining their overall health and well-being. The Town desires clearly defined and measurable results that show a return on investment, innovative and fun program activities, and thoroughly engaged and delighted employees. Work will include wellness program plan and design, communication and marketing of the program, administration of the program, wellness activities and offerings, in addition to results, reporting and analysis of the program.

## BACKGROUND

The Town of Mooresville successfully initiated a wellness program in 2012. To date we have taken a three-tiered approach that includes 1) Town Incentives and Activities, 2) Contracted Services, and 3) Health Insurance Programming. The program has become so successful that it has taken on a life of its own and we have maxed out our internal capacity.

### Town Incentives & Activities

Our incentive program completion rate has gradually grown each year to where we have a current Town completion rate of 80%. Eligible employees register for the program as part of the Town's open enrollment process in late May. The Town currently has 442 eligible employees. While the Town's wellness program runs all calendar year, our wellness incentive program runs through the Town's benefit year—that is, July 1 to June 30. Those completing the wellness program requirements prior to December 31 of each year receive a \$240 annual health insurance premium credit. This is purely a participatory program.

Current incentive requirements include:

- 1) Participate in BOTH of the following:
  - a. Town Biometric Screening
  - b. Any Wellness Activity/Challenge Sponsored by the Town
- AND
- 2) Participate in at least ONE of the following:
  - a. An additional wellness activity/challenge sponsored by the Town
  - b. Make and keep an appointment with the Employee Health Nurse to discuss biometric results
  - c. Meet and develop a personal wellness plan with the Employee Health Coach
  - d. Get a flu vaccine
  - e. Get an annual physical or other age/gender specific wellness exam such as a mammogram, pap test, or colonoscopy.

Current Town activities include:

- 1) Monthly events and wellness adventures
- 2) Employee led Wellness Committee
- 3) Safety & Wellness Fair in October
- 4) Walkability Event
- 5) Lunch & Learns

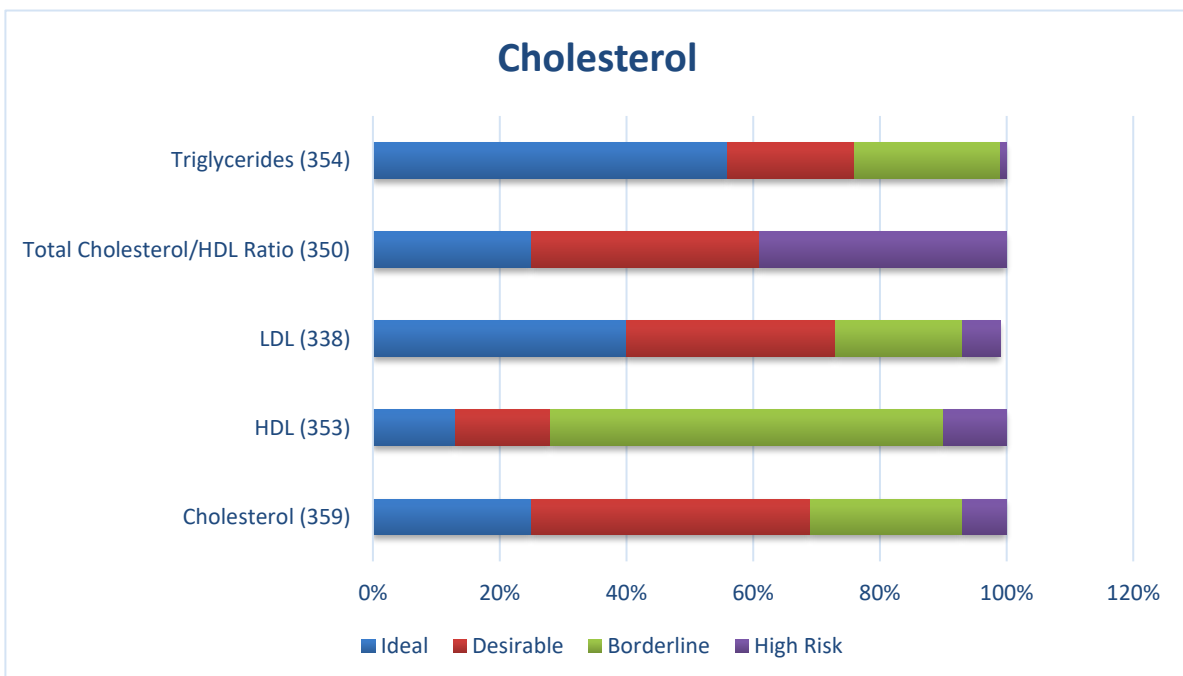
### Contracted Services

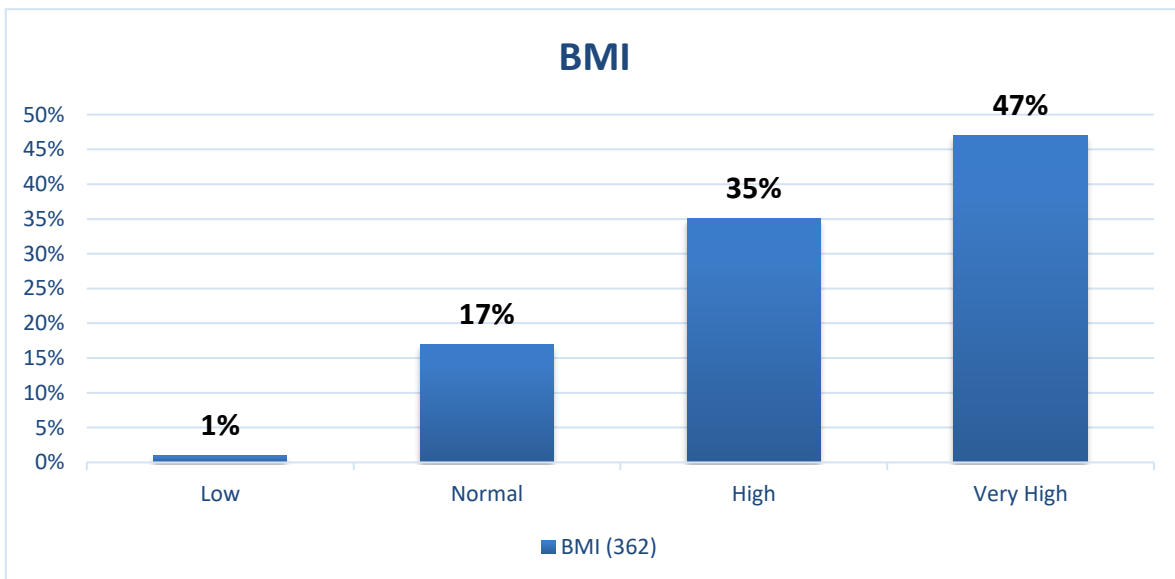
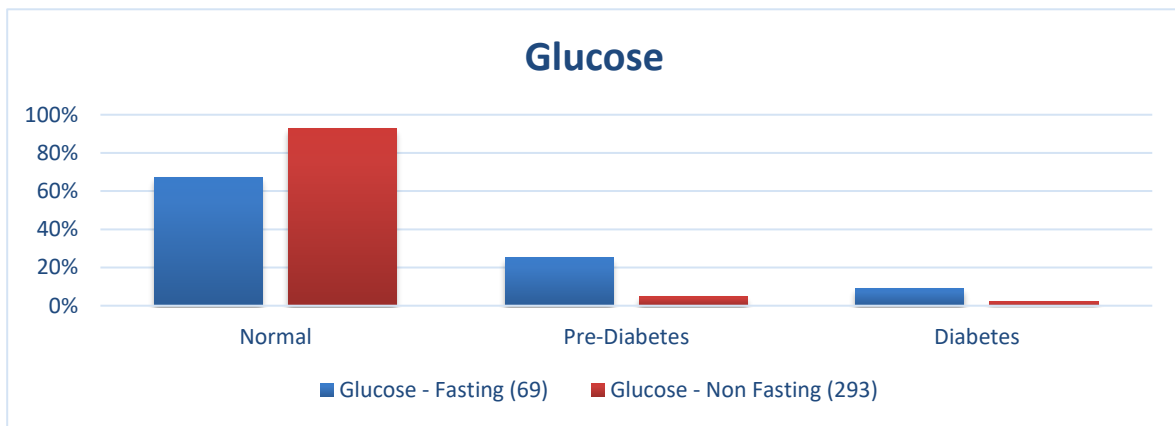
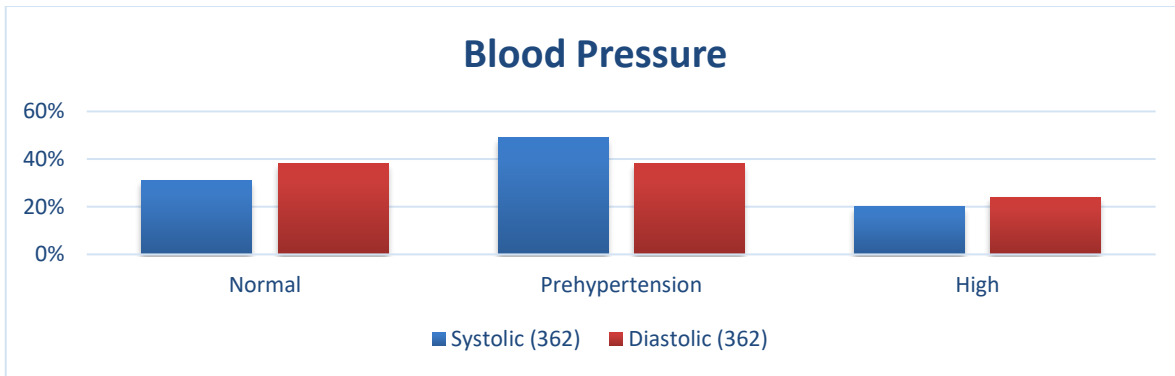
- 1) Contract with an Employee Health Nurse (RN) for 20 hours per week.
- 2) Contract with an Employee Health Coach for 20 hours per week.
- 3) Contracted Agency's monthly wellness newsletter
- 4) Monthly wellness focus
- 5) Monthly challenges (for incentive program)

### Health Insurance (BCBSNC) Programming

- Blue Rewards program with cash incentives for participation
- Biometric Screenings
- Flu Shots
- Health Risk Assessments

## CURRENT HEALTH STATUS REPORT





## PROPOSALS

Proposals should respond directly to all criteria outlined in this RFP in a clear and succinct format. Issuance of this RFP does not guarantee a contract will be awarded to any proposer. The Town may reject as non-responsive, at its sole discretion, any proposal or any part thereof that is incomplete, inadequate in its reply, or does not address each of the following areas:

## Executive Summary, Approach and Project Understanding

Each response shall include an Executive Summary that provides a brief narrative or overview explaining the organization's overall approach to employee wellness and how the proposed solution will meet the Town's requirements indicated in this RFP. The Executive Summary shall be structured so anyone reading only that section has a clear understanding of the proposed services. The intent of this summary is to convey to the Town that the organization understands the nature of the work, has the required professional skill set, and understands the level of effort necessary to successfully provide the defined services.

## Organization Information, Team and Professional Qualifications

- Name of your organization, address, telephone number, and contact information for the individual with primary responsibility for this proposal, including email address.
- Provide information as to the qualifications and experience of all executive, managerial, legal and professional personnel to be assigned to this project. Include resumes for proposed lead staff, being sure to note previous work completed that is applicable. Please indicate who from your organization will work directly with Town HR staff.
- Provide demographic information for full time employees in your organization and the location of your nearest office to Mooresville.
- Provide biographical profiles of the individual(s) who will be assigned to the project, their office location, and work contact information.
- Provide an overview of your organization's qualifications and experience in working with governmental clients. List all governmental clients currently under contract and any governmental clients that have terminated their relationship with your organization during the last three (3) years.

## Scope of Work

### Program & Plan Design

1. Wellness program
2. Incentive program
3. Communication plan
4. Project plan and schedule with all activities

### Communication & Marketing

1. Launch of a rebranded Wellness program/annual enrollment
2. Educational resources & communication materials
3. Secure web-based wellness portal for employees
4. Ongoing promotion and engagement of the Wellness program

### Administration

1. Onsite biometric screening coordination and administration (Screening provided by BCBSNC)
2. Onsite flu shot coordination and administration (Shots provided by BCBSNC)
3. Incentive program

4. Member/Participant tracking
5. Wellness Program

### Wellness Program Offerings & Activities

1. Confidential, onsite coaching sessions throughout the year
2. Smoking cessation program
3. Weight loss program
4. Onsite fitness sessions
5. Worksite challenges
6. Wellness adventures
7. Healthy eating/recipes
8. Lunch and Learns
9. Other suggested activities (please specify)

### Results, Reporting & Analysis

1. Detailed and summarized reports to program participants regarding their current state, program goals and progress
2. A listing of employees who qualify for the annual wellness incentive
3. Monthly reporting and data analysis
4. An annual executive review of the utilization and performance of the Town's Wellness Program

### Vendor Questions

1. What communication support do you provide with your wellness services? Please delineate what tools are included as a "standard package" and what services may incur additional fees.
2. Describe the range of available marketing and promotional collateral available. Supply some sample materials (newsletters, flyers, posters, postcards, etc.).
3. What web-based, online services are available to wellness participants? How is the site content developed? How often is it updated?
4. Can your web site be customized at the employer and employee level? Is there an additional charge?
5. Is the web site password protected and does it track utilization by client? What information are you able to report to the client regarding web utilization?
6. Do you have mechanisms for employees to track their own participation in your services?
7. Can you report back on participation and achievement? Please describe any limitations to this due to compliance with HIPAA.
8. What have you found to be the most effective incentive approach with your client base?

9. Briefly describe your quality assurance process and procedures.
10. Briefly describe the reports available to the individual participants and aggregate employer reports for coaching, challenges and incentive tracking. Please include a timeline of when these reports will be made available.
11. Provide a sample of your standard individual and aggregate reports. These should be included as attachments to your response.
12. Do you provide an evaluation/satisfaction survey and provide the results back to the client? Please share any aggregate data from previous evaluation surveys with other clients.
13. Describe a typical implementation process to include necessary lead time. Attach a sample implementation plan representative of your processes and timelines.
14. Briefly describe and define any abilities or attributes that distinguish your wellness services from other tools and vendors in the marketplace.
15. Provide references of 3 current and 2 former clients who are like the Town of Mooresville. Include company name, address and contact name, title, and phone number. Identify the number of employees served for each, and the length of the contract.

## **COST PROPOSAL**

The Town desires the most effective combination of price, performance, and quality possible within the constraints of its budget. The Town's preference is for a not-to-exceed price. Pricing given must be inclusive of all expenses, including travel related expenses. Personnel costs (including estimated hours and rate per hour for each category of personnel) should be itemized. All costs not explicitly stated in the price quotations shown in the proposal will be excluded from payment consideration by the Town if a contract is awarded based on the proposal.

Proposers shall give costs for the following:

- Program & Plan Design
- Administration
- Communication & Marketing
- Wellness Program Offerings & Activities
- Results, Reporting and Analysis
- Additional Costs (Please Specify)

## RFP SCHEDULE

Issued: December 20, 2018

Written Questions Due: January 15, 2019 2:00PM

Addendum issued (if needed): January 17, 2019

Proposals Due: January 24, 2019 2:00PM

## WRITTEN QUESTIONS

Questions or comments regarding this RFP (except to inquire about the number of addenda issued) must be in writing and received by the Town of Mooresville no later than 2:00 PM, January 15<sup>th</sup>, 2019. Written questions are to be: (1) mailed to the Purchasing Manager at the address shown below or (2) emailed to [dwhitaker@mooresvillenc.gov](mailto:dwhitaker@mooresvillenc.gov), or (3) faxed to (704) 799-4135, attention Purchasing Manager. Prospective proposers shall respond via fax or email with their intent to submit a proposal, so they may receive any forthcoming addenda.

The Town shall not be obligated to answer any questions received after the above specified deadline or any questions submitted in a manner other than as instructed above.

## EVALUATION CRITERIA

The evaluation of the proposals will be based on the items listed above, overall clarity and completeness of response to the proposal, responses from the current and past references provided and compliance to applicable laws and regulations.

## PROPOSAL SUBMISSION

The Town will receive proposals in the office of and addressed to:

Town of Mooresville  
Purchasing Division  
413 N. Main Street  
PO Box 878  
Mooresville, NC 28115  
Attention: David Whitaker, Purchasing Manager  
Two (2) copies of the proposal will be received up to  
THE HOUR OF 2:00 P.M., THURSDAY, JANUARY 24, 2019

The proposal can be delivered via U.S. Postal Service, Commercial Carrier or by Hand. It is the responsibility of each Bidder to ensure their proposal is received on time.



## **TERMS AND CONDITIONS**

Submission of a proposal indicates acceptance by the agency of the conditions contained in this request for proposal unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the Town and the agency selected.

The Town reserves the right without prejudice to reject any or all proposals, to waive any non-material irregularities or informalities in any RFP, to accept or reject any item or combination of items, and to request additional clarification of proposals.

All proposals received become the property of the Town and information included therein or attached thereto, shall become public record upon their delivery to the Town. Any information deemed by the bidding agency to be protected as a trade secret shall be submitted separately in a sealed envelope along with a statement supporting this assertion.

Any and all costs associated with the preparation of a response to this request are the responsibility of the proposer and are not to be passed on to the Town.