



**MPS COVER PAGE**  
**(Fill out and provide under Tab A)**

**REQUEST FOR PROPOSAL: RFP 963 for Health Advocacy Services**

This Request for Proposal (RFP) consists of: this document; all attachments, appendices, schedules and exhibits; any addenda issued in the future; and the current “MPS Terms and Conditions for Requests for Proposal” found at <http://mps.milwaukee.k12.wi.us/en/District/Vendors-Contractors/Vendors/Terms--Conditions.htm>.

Milwaukee Public Schools (MPS) is soliciting competitive sealed proposals from qualified professional firms or individuals to, in accordance with all the terms and conditions of this RFP, provide Health Advocacy Services.

Proposals will be accepted no later than 2:00 p.m., Central Time, Thursday, October 26, 2017. Proposals must be submitted in the manner set forth in § 4.3 and in the format set forth in § 7.

By signing below, respondent’s representative certifies on behalf of the Respondent, that:

- I have the legal authority to bind the Respondent responding to this RFP and to provide the services identified herein;
- I have fully read this RFP and all incorporated documents and submit for consideration the attached proposal;
- I have read and understand the Contract Compliance Services (CCS) requirements, and that any proposed HUB and or Student Engagement participation is binding, real and substantial as defined in § 1.3 of the RFP;
- The fees in the attached proposal have been arrived at independently and have not been divulged, discussed, or compared with the proposals of other respondents. No attempt has been made, nor will be made, to induce any other person or firm to submit or not submit a proposal for the purpose of restricting competition; and
- I agree that the attached proposal will remain open and its pricing will remain firm until execution of a contract for the services which are the subject of this RFP.

\_\_\_\_\_  
Respondent

\_\_\_\_\_  
Telephone Number

\_\_\_\_\_  
Address

\_\_\_\_\_  
Fax Number

\_\_\_\_\_  
City, State, Zip Code

\_\_\_\_\_  
Email Address

\_\_\_\_\_  
Signatory’s Full Name and Title

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## 1. OVERVIEW

It is expected that the successful respondent will establish a strong partnership with MPS. As a strong partner, respondent will need to become fully acquainted with the business of MPS: educating Milwaukee's children. A full description of MPS, its mission, demographics and vision can be found at <http://mps.milwaukee.k12.wi.us>.

### 1.1 Summary

Project Name: Health Advocacy Services  
RFP Number: RFP 963  
RFP Release Date: Thursday, October 05, 2017  
Question Due Date: 2:00 p.m. Central Time, Thursday, October 12, 2017  
RFP Due Date: 2:00 p.m. Central Time, Thursday, October 26, 2017

### 1.2 Definitions

Contractor: the successful respondent awarded the contract resulting from this RFP.

District: Milwaukee Public Schools.

Historically Underutilized Business (HUB): a for-profit business that is 51% or more owned, controlled and managed by minority, women, disadvantaged, emerging, SBA-8A or other MPS-targeted business owners who have been certified as such by an MPS-recognized agency.

Proposal: any response provided pursuant to this RFP.

Respondent: a firm or individual submitting a response to this RFP.

Student Engagement: a method of further educating MPS students through required MPS contractor involvement in career education and employment opportunities for students.

Subcontractor: a person or entity performing, or proposed to perform, any portion of the Contractor's contract.

### 1.3 Contract Compliance Services (CCS) Requirements

#### 1.3.1 Summary

In educating the children and youth of Milwaukee, MPS is also a primary purchaser of goods and services in the Milwaukee marketplace. MPS believes it is obligated to display, in its own operations, the values of excellence, diversity and economic responsibility that it strives to teach its students. To that end, many MPS contracts require the use of HUB firms and the engagement of the Contractor in Student Employment and/or Student Career Education activities.

HUB participation must be "commercially useful"; *i.e.*, the goods or services to be provided by the HUB firm are a direct function of the scope of services described in this RFP and resulting contract. The HUB participation requirement may be met by respondent in several ways:

- (1) By identifying your firm as a certified HUB vendor that intends to perform a minimum of the required HUB participation for this RFP;
- (2) By engaging in a joint venture with a certified HUB firm;
- (3) By subcontracting with one or multiple certified HUB firm(s); or
- (4) By making second-tier purchases from one or multiple certified HUB firm(s).

Respondents are free to meet HUB participation requirements with any certified HUB vendor as long as proof of HUB certification is provided. Respondents may also contact MPS's Office of Contract Compliance Services for a list of MPS-registered HUB firms. **NO CREDIT FOR PARTICIPATION WILL BE GRANTED UNTIL MPS-RECOGNIZED HUB FIRM CERTIFICATION DOCUMENTATION IS RECEIVED.**

The Student Engagement program seeks to maximize Contractor involvement in career education and employment opportunities for students. Student Engagement has two separate components: (1) career education activities that directly involve MPS students; and (2) paid student employment hours that provide one or more MPS students with an actual, meaningful employment experience. To meet student employment hours, the Contractor-employed students must be MPS students, registered through MPS's Office of Contract Compliance Services. Once hired by the Contractor, students will be paid, at a minimum, the current Living Wage Rate as identified by the City of Milwaukee Ordinance 310-13. Under no circumstances will students work under conditions that would be considered a hazardous work environment.

Career Education activities include, but are not limited to, the following:

- (1) Classroom presentations at MPS project sites or various contractor career-specific activities.
- (2) Full classroom or small group tours of office environments. If a contractor is going to provide this type of activity, all required permission slips/arrangements must be made with the school by following normal field trip procedures.
- (3) Classroom skill development project activities in conjunction with teacher lesson plans such as math, science, reading, writing, etc.
- (4) Other CCS-approved contractor provided options.

Student Employment participation includes, but is not limited to, the following options:

- (1) Employment placement within prime contractor's establishment.
- (2) Student summer employment placement.
- (3) Student after-school and weekend placement, where appropriate.
- (4) Alternative placement. (An alternative placement arrangement is an available option for contractors with documented age restrictions or capacity and location limitations.)
- (5) Other CCS-approved provided options.

Further additional information relating to HUB participation requirement and the Student Engagement requirement can be found at <http://mps.milwaukee.k12.wi.us/en/District/About-MPS/School-Board/Contract-Compliance-Services.htm>. For any other questions related to MPS's HUB program, contact MPS's Office of Contract Compliance Services via email at [505@milwaukee.k12.wi.us](mailto:505@milwaukee.k12.wi.us).

### 1.3.2 *Requirements*

The HUB participation requirement for the contract to be awarded pursuant to this RFP is:

**2% per 12-month term.**

The Student Engagement requirement for the contract to be awarded pursuant to this RFP is:

**300 hours of Student Employment per 12-month term; and 10 hours of Career**

## Education per 12-month term.

A respondent's status as a 501(c)(3) tax-exempt nonprofit organization does not excuse it from fulfilling these requirements.

### 1.3.3 Forms

Respondent must complete and return those forms checked below with its proposal or it will fail as to that minimum proposal requirement. The required forms are attached to this RFP as appendices and schedules. Fillable versions of these same forms can also be found at <http://mps.milwaukee.k12.wi.us/en/District/About-MPS/School-Board/Contract-Compliance-Services.htm> (click on Forms and Schedules, then click on Vendors). The fillable version of the forms must be printed, signed and attached to respondent's proposal.

- Appendix A - HUB Utilization Plan (If box is checked, current certification document, with NAICS code, must be submitted with RFP response.)
  - Appendix B - Prime Vendor Information Sheet
  - Schedule H1-B - Student Career Awareness/Education Plan/Commitment
  
  - Schedule H1-A - Student Employment Commitment
- OR** Either Schedule H1-A or Schedule H1-C must be returned.
- Schedule H1-C - Alternative Placement Request Student Employment

Even if there are no HUB or Student Engagement requirements identified in § 1.3.2, respondents must still fill out "Appendix B - Prime Vendor Information Sheet". The information disclosed in this form will not be used in evaluating a respondent's proposal and is solicited solely for reporting purposes to the Board of School Directors.

### 1.3.4 Evaluation and Award

MPS's Manager of Contract Compliance Services, or his/her designated staff, will be the sole judge of the suitability and completeness of the returned CCS forms and will assign a "pass" or "fail" determination accordingly as to that minimum proposal requirement. MPS reserves the right to award the contract to the respondent who submits a meaningful utilization plan that provides a real opportunity for HUB involvement.

Even if this RFP does not identify CCS requirements in § 1.3.2, MPS reserves the right to award up to ten additional points to respondents who will utilize a certified HUB or commit to Student Engagement hours. To be eligible to receive these points, respondent must detail in its proposal what role(s) the proposed HUB subcontractor will be responsible for in the scope of services or specify what engagement MPS students will take place within a 12-month contract term. Forms can be found as identified in § 1.3.3 and must be completed and returned with a proposal for consideration. MPS's Manager of Contract Compliance Services, or his/her designated staff, will be the sole judge of the suitability of the proposed participation and will assign points accordingly.

Within 20 business days after a contractor receives MPS Board approval of its contract, it must submit copies of all executed HUB firm subcontracts and all supporting and associated HUB documentation to the Office of Contract Compliance Services. Falsification of any information related to a subcontract, including, but not limited to, subcontractor's name or actual work to be performed by HUB firms is

prohibited. No HUB firm substitutions or scope of work reductions shall occur without the expressed written consent of MPS's Manager of Contract Compliance Services or his/her designated staff.

Failure to meet CCS requirements may result in financial sanctions up to, or exceeding, 70% of the value of the awarding contract and will be assessed against contractor invoices. Sanction dollars will be released on subsequent invoices as compliance documentation is provided.

## **2. SERVICES REQUESTED**

### **2.1 Scope of Services**

MPS seeks proposals for additional customer support and advocacy for district employees and their families along with retirees and their families that will assist in educating them about their benefits options and assist them in resolving benefits issues. Cost transparency tools and services are also provided to employees and retirees that can result in claims savings to the district when lower-cost health and dental services are secured by the employee/retiree. Advocates will also assist with enrollment in and use of government plans such as the Healthcare Exchange, Medicare or Medicaid.

Respondent should provide the following: additional customer service regarding the district's benefit programs; assist members in evaluating health plan choices during the open enrollment period; provide assistance in resolving billing questions and concerns; help find the right type of health provider; assist member prior to any elective admission, surgery or procedure with cost and quality data, scheduling of appointments, coordination of home health care and agencies, pharmacy and the like to ensure a smooth transition; provide pricing transparency services to assist employees in selecting quality and cost effective care and provide assistance in answering questions regarding Medicare Advantage benefits and Healthcare Exchange options and other government programs.

Respondent will need to have knowledge of the MPS medical, vision, dental, FSA, HSA, Life insurance and disability plans as well as eligibility rules and requirements of these benefits to service approximately 8,500 enrolled employees plus their dependents, approximately 2,000 non-Medicare retirees and approximately 5,500 Medicare eligible retirees and their family members. Provider must have access to a robust database concerning the cost of various healthcare services charged by providers in the areas where MPS has employees and retirees. Provider must provide members education regarding healthcare services and cost; access to support and help concerning the use of healthcare cost transparency tool(s); access web support tool(s) covering consumerism, healthcare costs and healthcare; claims resolution support, communications support and provider selection support. Provider must be able to assist members with MPS Employee Self Service portal.

Finalist interviews may be required and vendor will need to travel to Milwaukee, WI to be interviewed.

### **2.2 Minimum Respondent Qualifications**

- a. Respondent is not a current provider of a benefits package or plan to MPS;
- b. Respondent must provide reporting and/or metrics demonstrating a minimum of \$250,000 return on investment, with a 10% rebate of annual fees paid if not obtained;
- c. Respondent must provide at a minimum 9 hours of phone support for members Monday through Friday and 4 hours of phone support Saturdays.

## **3. MPS CONTRACT TERMS AND CONDITIONS**

### 3.1 Resulting Contract

The successful respondent agrees to enter into MPS’s standard Professional Services Contract (PSC), a current version of which can be found at <http://mps.milwaukee.k12.wi.us/en/District/Vendors-Contractors/Vendors/Forms.htm> under “Professional Services Contract Long Form”. MPS will not sign any form or contract offered by respondent.

Any exception to the terms and conditions set forth in the PSC, or any additional terms or conditions proposed by respondent to be incorporated in the PSC, must be provided as set forth in this § 3.1 to be considered.

Only those additional contract terms or conditions specifically set forth in Tab E of a proposal will be considered by MPS. Any exception or proposed additional contract term or condition not set forth in Tab E will neither be considered nor accepted. It is insufficient for respondent to cite to a document or incorporate a document by reference. Any such citation or incorporation will be disregarded.

MPS’s Director of Procurement & Risk Management, or his/her designated staff, will review any exceptions or proposed additions to determine if their nature or extent precludes ultimate agreement on a contract between MPS and respondent and will assign a “pass” or “fail” determination accordingly as to that minimum proposal requirement.

A “pass” as to the minimum proposal requirement does not mean that all the exceptions or proposed additions will be agreed to by MPS, but merely that they will be a point of discussion should respondent and MPS enter into contractual negotiations.

### 3.2 Proposals to Remain Open

By submitting a proposal, respondent is agreeing that its proposal will remain open and its pricing will remain firm until execution of a contract for the services which are the subject of this RFP.

### 3.3 Award

This RFP will result in either the award of a single contract to a single contractor or no award; there will not be multiple awards made under this RFP.

Contract awards are subject to review by the MPS Administration and Board of School Directors.

### 3.4 Contract Period

It is anticipated that a contract resulting from this RFP will be for a period of one year from January 1, 2018 through December 31, 2018 with the possibility of two one-year extensions. MPS will base its renewal decisions on the following performance metrics to be rated by MPS personnel. A contractor must attain a minimum score of 90 points to be eligible for contract renewal; however, 90 points does not guarantee renewal.

| Performance Metrics   | Points |
|---|--------|
| Provide reporting and/or metrics on a quarterly basis demonstrating return on investment during Contract Term | 40     |

|  |     |
|--|-----|
| Provide a minimum of \$250,000 return on investment, with a 10% rebate of annual fees paid if not obtained | 10  |
| Customer service provided to MPS   | 20  |
| Customer service provided to members   | 20  |
| Accuracy of Billing/Invoicing  | 10  |
|  |     |
| Total  | 100 |

## 4. INSTRUCTIONS

### 4.1 Communication/Questions

The only permissible communication regarding this RFP with MPS staff, including any and all questions and requests for clarification, must be directed, in writing via email, to [mpsrfps@milwaukee.k12.wi.us](mailto:mpsrfps@milwaukee.k12.wi.us). The subject line of the email must be labeled “RFP 963 - Question.” Any other communication to, or contact with, a MPS staff member regarding this RFP by respondent will be considered unauthorized and a cause for rejection of a respondent’s proposal.

Any such communications must be received by 2:00 p.m. Central Time, Thursday, October 12, 2017 or will be disregarded.

If a vendor has specific concerns regarding any aspect of the CCS process, including requirements, how requirements may be met or other, questions in writing may be submitted in writing directly to CCS at [505@milwaukee.k12.wi.us](mailto:505@milwaukee.k12.wi.us). However, the deadline for these questions remains the same. Any questions submitted to CCS must be received not later than 9:00 a.m. Central Time on 10/12/2017.

It is incumbent upon respondents to point out any possible discrepancies, omissions or ambiguities in the RFP using this question process. This includes alerting MPS that the RFP services or pricing requested are non-standard in the industry. By failing to do so, a respondent waives the right to claim any provision of this RFP is ambiguous.

### 4.2 Answers/Addendum

Answers to submitted questions, as well as any additional information or clarifications to the RFP, will be provided in the form of addenda posted at <http://mps.milwaukee.k12.wi.us/en/District/Vendors-Contractors/Vendors/Bids-RFPs.htm>. CCS may engage in vendor-specific conversations regarding requirements, but any general information relevant to all vendors generated by these conversations will be published in the addendum.

It is the sole responsibility of respondents to check that site for any addenda that may be issued. Addenda will not be otherwise communicated to prospective respondents and no other response to the emailed questions will be received by the sender.

In the event of any conflict with the RFP, addenda shall govern.

### 4.3 Submission of Proposals

Respondent must submit one original proposal, clearly marked as such with an original signature, and 7 copies, for a grand total of 8 items. Each proposal – original and copies – must be collated and bound in

a manner to make each individual proposal readily apparent and complete.

Each proposal must be clearly marked “RFP 963”. The proposals must be collectively packaged and sealed. The package should show the following information on the outside: respondent’s name, address, and “RFP 963 – Health Advocacy Services”. The package must be delivered to:

Milwaukee Public Schools  
Department of Procurement & Risk Management  
5225 W. Vliet St., Room 160  
Milwaukee WI 53208

Proposals are due by 2:00 p.m. Central Time, Thursday, October 26, 2017. Proposals received after this time will fail as to that minimum proposal requirement.

Proposals shall be deemed received by MPS when: (1) time-stamped in the Department of Procurement & Risk Management; or (2) delivered to the Department of Procurement & Risk Management with proof that a common carrier delivered the proposal to the central mail room at 5225 W. Vliet Street, Milwaukee, WI 53208 and it was signed for by an MPS employee no later than 2:00 p.m., Thursday, October 26, 2017.

Electronic proposals will not be accepted.

#### 4.4 Clarifications

After receipt of proposals, it may be necessary for MPS to contact respondent with clarification questions. MPS will do so via the email address of the signatory provided on the respondent’s submitted Cover Page (Tab A). Clarification questions often need imminent answers and short deadlines for response may be necessary. It is the respondent’s responsibility to monitor the contact email identified at all times during the RFP process. Failure to timely respond to a clarification question submitted to the contact email may result in the rejection of the proposal.

#### 4.5 Award Notification

Upon final approval by the Milwaukee Board of School Directors, MPS will post the results of the RFP at <http://mps.milwaukee.k12.wi.us/en/District/Vendors-Contractors/Vendors/Tabulations--Awards.htm>. No individual communications will be sent out to respondents. It is the sole responsibility of respondents to check the site for any contract award that may be issued. Respondents may not contact MPS to inquire about the status of an award prior to the posting of the results.

### 5. MINIMUM PROPOSAL REQUIREMENTS

MPS will determine whether proposals have met the seven minimum proposal requirements set forth below. Only those proposals passing all of these minimum proposal requirements, unless waived, will be passed on for evaluation according to the criteria set forth in § 6.1.

| Minimum Proposal Requirements  |           |
|--|-----------|
| <b>Timeliness</b> – Submitted by the due date and time. <i>See</i> § 4.3.  | Pass/Fail |
| <b>Signed Cover Page</b> (Tab A)   | Pass/Fail |
| <b>Cost Proposal Form</b> (Tab C) – Cost is set forth on the Cost Proposal | Pass/Fail |



|  |           |
|--|-----------|
| Form provided as Exhibit 2 to this RFP.  |           |
| <b>CCS Forms</b> (Tab D) – Suitability and completeness of the returned CCS forms. <i>See</i> § 1.3.4.                       | Pass/Fail |
| <b>Exceptions to Contract Terms and Conditions</b> (Tab E) – <i>See</i> § 3.1.   | Pass/Fail |
| <b>Minimum Respondent Qualifications</b> (Tab F) – Respondent meets the minimum respondent qualifications. <i>See</i> § 2.2. | Pass/Fail |
| <b>Completeness</b> – The proposal otherwise complies with the format and content parameters. <i>See</i> § 7.                | Pass/Fail |

MPS reserves the right, in its sole discretion and if deemed in the best interest of MPS, to: waive a minimum proposal requirement; waive irregularities in any proposal; reject all proposals received in response to this RFP; accept late proposals or improperly formatted proposals; and make a partial award or not make any award.

## 6. EVALUATION

### 6.1 Criteria

The criteria below, weighed as indicated, will be used to evaluate those proposals that meet all minimum proposal requirements.

| Criteria  | Description                                  | %   |
|---|--|-----|
| <b>Experience, Qualifications and Financial Stability</b>             | Information set forth in Section 1 of Tab B. | 20% |
| <b>Quality of Proposed Solution and Ability to Meet MPS’s Needs</b>   | Information set forth in Section 2 of Tab B. | 25% |
| <b>Quality of Proposed Solution and Ability to Meet Members Needs</b> | Information set forth in Section 3 of Tab B. | 20% |
| <b>Cost</b>   | Pricing of Proposed Services.                | 35% |

### 6.2 Process

#### 6.2.1 Committee

An evaluation committee will be established to evaluate the proposals according to the criteria identified in § 6.1. Proposals should be complete on their face. However, after opening of responses, MPS reserves the right to request supplemental information from any or all of the respondents and to factor any additional information into the evaluation. MPS may require oral presentations of a group of finalists in person or on the telephone and may request further information from those finalists.

#### 6.2.2 Best and Final Offer

MPS reserves the right to involve one or more respondents in a Best and Final Offer (“BAFO”) process. BAFO may be used when no single response addresses all the specifications, when the costs submitted by all respondents are too high, when two or more respondents are virtually tied after the evaluation process or when all proposals are unclear or deficient in one or more areas. If BAFO is utilized, respondents may be required to submit revisions to their proposals. MPS will send out a BAFO request to invited respondents that will set forth the areas of the proposal to be covered and the date and time by

which the BAFO must be returned. All respondents will be treated equally and, during the process, no information will be transmitted to any respondent about any other respondent's offer. MPS reserves the right, in BAFO, to apply additional criteria not listed in the original RFP, but any additional criteria will be disclosed to respondents in the BAFO request.

### 6.2.3 *Negotiation*

MPS will open negotiations with the highest-ranked respondent after evaluation, interviews or BAFO process. MPS reserves the right to open negotiations with the second highest-ranked vendor if negotiations with the highest-ranked vendor are not successful. MPS reserves the right to delete or add services until the final contract signing.

## **7. PROPOSAL FORMAT AND CONTENT**

Proposals are to be formatted and tabbed in the form and sequence described in this § 7. Only information provided in the tabs set forth below will be considered. Elaborate proposals, *e.g.*, expensive artwork, beyond that sufficient to present a complete and effective response are not necessary. Quality, not quantity, is desired.

### **7.1 Tab A: Signed Cover Page**

The MPS cover page must be signed by a representative of respondent authorized to bind respondent and submitted as Tab A of the proposal. Please include all contact information.

### **7.2 Tab B: Response to Request for Services**

#### *7.2.1 Section 1: Respondent's Experience, Qualifications and Financial Stability*

With specific reference to the services identified in § 2.1, detail respondent's experience and qualifications. Provide specific descriptions of like projects Proposer has done in environments comparable to MPS.

Provide at least three specific client references, including the names and contact information of the individual(s) you would propose MPS contact. MPS reserves the right to contact or visit any party listed as a reference. MPS also reserves the right to use other sources to obtain information about respondent's experience.

Demonstrate the impact (customer satisfaction, cost savings/avoidance, etc.) your organization has had for other clients, including members and employers.

Describe respondent, including, at a minimum: number of employees; number of years in business; type of services provided; and legal status, *i.e.* corporation, partnership, limited liability company.

Provide documentation to verify respondent possesses adequate financial support, assets, and organization to provide the products and services required in this RFP. This may take the form of financial statements, credit ratings, a line of credit, or other financial arrangements.

#### *7.2.2 Section 2: Quality of Proposed Solution and Ability to Meet MPS Needs*

Describe respondent's capacity to ensure that MPS will timely and competently receive all the services requested, taking into consideration all other commitments of the respondent.

Be as specific as possible in describing respondent's plan for providing the services described in § 2.1.

Detail respondent's approach to customer service and provide brief resumes of all team members or employees who would be assigned to work with MPS.

What are your hours of operation and where is your call center located?

Detail your implementation process.

Describe how you coordinate care among various vendors.

Provide your approach for establishing contact with MPS's current benefit providers.

What metrics and reporting will be provided as part of these services? Please include sample metrics and reports.

Describe your process to comply with Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy requirements.

Are you able to act as a first line contact for all covered members benefit questions, with triage-type inquiries only sent back to MPS Benefits for data specific to MPS to which Respondent does not have access? Examples may be but are not limited to sending calls back for retiree Board-paid subsidy; forms received by MPS; benefit billing corrections; address changes, etc. Please describe your methodology for this service.

### *7.2.3 Section 3: Quality of Proposed Solution and Ability to Meet Members Needs*

Describe your methodology to assist members in locating best or highest quality providers. Indicate any tools or technology utilized and available to members. What data is used, and how is it delivered?

Describe your ability to provide claims resolution support, communications support and provider selection support for members.

Describe how you assist members to be better consumers.

### **7.3 Tab C: Cost Proposal Form**

Exhibit 1, attached hereto, must be completed and submitted as Tab C of the proposal. This is the only place cost/pricing should be referenced in the proposal.

### **7.4 Tab D: CCS Forms**

Complete and submit all required CCS forms, identified in § 1.3.3, as Tab D of the proposal.

### **7.5 Tab E: Contract Terms and Conditions**

Pursuant to the directions in § 3.1, identify any exceptions to the terms and conditions contained in MPS's Professional Services Contract or additional proposed terms and conditions.

#### **7.6 Tab F: Minimum Respondent Qualifications**

Exhibit 2, attached hereto, must be completed and submitted as Tab F of the proposal.

#### **7.7 Tab G: Miscellaneous**

Any additional materials, brochures or other documentation may be submitted as Tab G. Only relevant and necessary information should be included.

#### **7.8 Tab H: Confidential or Proprietary Information**

If respondent wishes to designate any portion of its proposal as confidential or proprietary, respondent may fill out and submit a "Request to Designate Information as Confidential or Proprietary" as Tab H. This form is found at <http://mps.milwaukee.k12.wi.us/en/District/Vendors-Contractors/Vendors/Forms.htm>. The Board is bound by Wisconsin statutes regarding public records (Wis. Stat. § 19.21, *et seq.*) and, as such, all of the terms of the contract resulting from this RFP will be public.

#### **8.0 Appeals**

Appeals regarding MPS's procurement process are handled by the Office of Accountability and Efficiency. Details on appeals can be found at [http://mps.milwaukee.k12.wi.us/MPS-English/OBG/OAE/Policies-and-Laws/Bid\\_RFP-Appeals-Form.pdf](http://mps.milwaukee.k12.wi.us/MPS-English/OBG/OAE/Policies-and-Laws/Bid_RFP-Appeals-Form.pdf).

## EXHIBIT 1 to RFP 963: Health Advocacy Services

### COST PROPOSAL WORKSHEET

**Respondent Name:** \_\_\_\_\_

| DELIVERABLE  | UNIT OF COST  | MONTHLY<br>COST PER<br>MEMBER* | MONTHLY<br>COST (16,000<br>MEMBERS x<br>MONTHLY<br>COST PER<br>MEMBER)* | ANNUAL COST<br>(MONTHLY<br>COST x 12<br>MONTHS) |
|--|---|--------------------------------|---|---|
| Health Advocacy<br>Services as indicated in<br>Response to RFP 963 | Monthly fee based<br>on approximately<br>16,000 members<br>YEAR 1 | <input type="text"/>           | <input type="text"/>  | <input type="text"/>                            |
| Health Advocacy<br>Services as indicated in<br>Response to RFP 963 | Monthly fee based<br>on approximately<br>16,000 members<br>YEAR 2 | <input type="text"/>           | <input type="text"/>  | <input type="text"/>                            |
| Health Advocacy<br>Services as indicated in<br>Response to RFP 963 | Monthly fee based<br>on approximately<br>16,000 members<br>YEAR 3 | <input type="text"/>           | <input type="text"/>  | <input type="text"/>                            |
| TOTAL (SUM OF<br>ANNUAL COST YRS 1<br>THROUGH 3)                   | NA  | NA                             | NA  | <input type="text"/>                            |

\*Cost submitted shall be all-inclusive, including but not limited to, any and all administration expenses, overhead expenses, staffing costs, etc.

Any modification to this form will be considered non-compliance with the format and content parameters. Any supplemental pricing information attached or referenced will not be considered.

## **Exhibit 2 to RFP 963: Health Advocacy Services**

### **MINIMUM RESPONDENT QUALIFICATIONS**

1. Respondent is not a current provider of a benefits package or plan to MPS;
2. Respondent must provide reporting and/or metrics demonstrating a minimum of \$250,000 return on investment, with a 10% rebate of annual fees paid if not obtained;
3. Respondent must provide at a minimum 9 hours of phone support for members Monday through Friday and 4 hours of phone support Saturdays.

Does respondent meet, or will it comply, with all minimum respondent qualifications as identified above?

Yes       No

If “no” is checked, MPS will fail respondent as to this minimum proposal requirement.

## APPENDIX A

### HUB Utilization Plan

**Page 1 of 2**

The prime vendor should use this form when there is a HUB participation requirement. The form documents how the HUB requirement will be met and will become a binding part of the contract. If you are a prime vendor who is also a HUB vendor and will be providing services to meet a HUB participation requirement, you must fill this section out. Prime HUBs must identify the actual percentage of service/product they will provide. Only the percentage of service/product actually provided by the HUB prime will count toward HUB participation.

If you are a prime vendor who is not a HUB, list any contractors or vendors you will employ or partner with to fulfill the HUB requirement.

THIS SECTION MUST BE FILLED IN COMPLETELY. FAILURE TO LIST ALL HUB CONTRACTORS OR VENDORS MAY RESULT IN YOUR RESPONSE BEING DECLARED INVALID AND REMOVED FROM CONSIDERATION. IDENTIFICATION OF A HUB FIRM HERE INFERS PRIME HAS SPOKEN WITH HUB VENDOR AND BOTH ARE IN AGREEMENT WITH CONTINGENT COSTS AND SERVICES LISTED BELOW:

**PROVIDE THE FOLLOWING INFORMATION FOR EACH HUB VENDOR. ATTACH ADDITIONAL SHEETS IF REQUIRED.**

COMPANY NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE #: \_\_\_\_\_ EMAIL: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

PLEASE LIST TYPE OF WORK TO BE PERFORMED, WHICH MUST BE COMMERCIALY USEFUL TO THE SCOPE OF SERVICES OF THE RFP. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

IS THIS A CERTIFIED FIRM?     Yes     No    **(You must include a copy of the current certification)**

CHECK WHICH TYPE OF FIRM:    MBE,    WBE,    SBE,    DBE,    SBA-8A or OTHER \_\_\_\_\_  
(PLEASE SPECIFY CERTIFICATION TYPE)

DOLLAR AMOUNT OF HUB PARTICIPATION: \$ \_\_\_\_\_

PERCENT OF BID: \_\_\_\_\_% Total HUB participation must be equal or greater than \_\_\_\_\_%

1. List the name, address, telephone number for the contact person of all HUB firms contacted to meet the HUB goals, excluding those listed above.
  
2. Please indicate any problems you had in meeting the HUB requirement for this RFP. Did you contact CCS during preparation of this RFP?

The undersigned acknowledges that the HUB participation percentages are mandatory and failure to comply with them will render this bid response invalid and any contract made pursuant to it void.

This proposal is submitted by: \_\_\_\_\_  
(Name of **Proposer's Firm**)

\_\_\_\_\_  
(Street Address) (City, State and Zip Code)

At Milwaukee, Wisconsin, this \_\_\_\_\_ day of \_\_\_\_\_ 2017

If a corporation, also answer the following:  
Incorporated under the laws of which state? \_\_\_\_\_

**AFFIX YOUR CORPORATE SEAL HERE:** 

If you are incorporated outside of Wisconsin, are you licensed to do business in Wisconsin? \_\_\_\_\_

Print or type the name of the authorized signer:  
\_\_\_\_\_

Proposer's Signature and Title:  
\_\_\_\_\_







**SCHEDULE H1-B**

**Student Career Awareness/Education Plan/Commitment**

Project/Contractor Information

|                         |                       |                             |
|-------------------------|-----------------------|-----------------------------|
| _____                   | _____                 | _____                       |
| CONTRACTOR COMPANY NAME | MPS SITE/PROJECT NAME | NUMBER OF<br>REQUIRED HOURS |

Name of Education Liaison Contact

|                |       |       |        |
|----------------|-------|-------|--------|
| _____          | _____ | _____ | _____  |
| CONTACT PERSON | PHONE | FAX   | E-MAIL |

Place an "X" below to indicate how you plan to fulfill your career awareness/education requirement. This is a ten (10) hr. requirement unless otherwise listed in the project specifications. Preparation time of two (2) hours is allowed. Career awareness/education hours are counted by company, not by number of presenters. Interviews with students for fulfillment of student employment requirements and conversations with CCS personnel are not counted toward education activities.

- |   |  |
|---|--|
| <input type="checkbox"/> Classroom skill development/project activity                   | <input type="checkbox"/> Career-based learning & online career coach mentoring |
| <input type="checkbox"/> Student group tours/observations – job site                    | <input type="checkbox"/> Classroom presentation/demonstration                  |
| <input type="checkbox"/> Contractor provided option (Please provide description.) _____ |  |

Provide a detailed description of your career awareness/education plans for this project.

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I hereby declare and affirm that I, \_\_\_\_\_  
 am a duly authorized representative of \_\_\_\_\_  
 located in \_\_\_\_\_  
 STATE COUNTY CITY

and that I have personally reviewed the material and facts describing our proposal regarding student career awareness/education. I agree to provide the experience(s) contained herein. If a contractor is non-compliant, MPS may impose one or more identified sanctions, and require proof of corrective action by the contractor.

|   |       |       |
|---|-------|-------|
| _____                                   | _____ | _____ |
| SIGNATURE OF AUTHORIZED COMPANY OFFICER | TITLE | DATE  |

**For Office Use Only**

|                                 |       |       |
|---------------------------------|-------|-------|
| _____                           | _____ | _____ |
| SIGNATURE OF CCS REPRESENTATIVE | TITLE | DATE  |



SCHEDULE H1-A Student Employment Commitment

Project/Contractor Information

CONTRACTOR COMPANY NAME MPS SITE MPS PROJECT

Name of Employment Liaison Contact

CONTACT PERSON PHONE FAX E-MAIL

Number of required hours: \_\_\_\_\_

Options

Place an "X" below to indicate how you plan to fulfill your student employment requirement.

- ALTERNATIVE PLACEMENT SITE AFTER SCHOOL SUMMER YOUTH APPRENTICESHIP OTHER

Employment Plan - Use additional pages if necessary. Plan must meet hours required.

From \_\_\_\_\_ to \_\_\_\_\_

Table with 2 rows: List month, Number of employment hours

Provide a detailed description of your employment plan for this project.

Blank lines for detailed description of employment plan

I hereby declare and affirm that I, \_\_\_\_\_ am a duly authorized representative of \_\_\_\_\_ located in \_\_\_\_\_

and that I have personally reviewed the material and facts describing our proposal regarding student employment. I agree to provide an employment partnership experience for the MPS student. (HIC is required to be submitted as well). If a contractor is non-compliant, MPS may impose one or more identified sanctions, and require proof of corrective action by the contractor.

SIGNATURE OF AUTHORIZED COMPANY OFFICER TITLE DATE

For Office Use Only

SIGNATURE OF CCS REPRESENTATIVE TITLE DATE



Schedule H1-C
Alternative Placement Request
Student Employment

Please submit the following form identifying your election for Alternative Placement. The Office of Contract Compliance Services is the sole approver for alternative placement and will assist with referrals of available sites.

Alternative Placement is available to MPS Contractors/Vendors with justified limitations which prevent actual student employment participation within their place of employment. Additionally, a company representative will be required to perform 2 alternative placement site visits for the duration of the project or per 12 month contract period (where applicable). "Alternative Placement" is defined as a work site other than that of the MPS Contractor/Vendor's worksite, identified as appropriate for work experience with MPS students in order to meet MPS Contractor/Vendor's Student Employment obligations under the DFMS Participation Plan for Contractors or MPS Professional Services Contract. Justifications for Alternative Placement include the following: company age restrictions, work-site capacity limitations and location limitations.

In limited circumstances, when the Contractor's place of employment is beyond the transportation resources available to students or when certain project circumstances exist that prevent student employment at the job site, the Contractor may subcontract with a third party who is currently providing services that were originally agreed upon between MPS and the Contractor for an "alternative placement" of students. In such cases, the contractor maintains responsibility for the student's work site and wages as well as ensuring a reasonably safe and meaningful work experience. Under this arrangement the contractor will be the "statutory employer" for all insurance purposes, including, but not limited to worker's compensation purposes, and is hereinafter referred to as "Contractor/Statutory Employer." The placement is hereinafter referred to as "Alternative Placement" or "Alternative Placement Site." The Contractor/Statutory Employer understands and agrees that financial responsibility for claims or damages to students/employees, shall rest with Contractor/ Statutory Employer. Contractor/ Statutory Employer shall effect and maintain any insurance coverage, including but not limited to, Workers' Compensation, Employers' Liability and Commercial General Liability.

A company representative will be required to perform 2 alternative placement site visits for the duration of the project or per 12 month contract period (where applicable). Each company must provide MPS with documentation of the alternative placement site visit and verification of site safety.

Project/Contractor Information

Form with fields for CONTRACTOR COMPANY NAME, MPS PROJECT NAME, BID/RFP NUMBER, CONTACT PERSON, PRIMARY PHONE, and E-MAIL.

Number of required project hours: \_\_\_\_\_

ALTERNATIVE PLACEMENT SITE ELECTION

Place an "X" below to indicate if you plan to fulfill your student employment requirement through an alternative placement site.

- Yes, I am requesting alternative placement.
No, I plan to employ the student employee within my organization.

Please list below justification for student employment request.

Four horizontal lines for providing justification for student employment request.

**TO BE COMPLETED BY CONTRACTOR/VENDOR:**

I hereby declare and affirm that [ \_\_\_\_\_ ] is in agreement with the conditions for utilizing an  
INSERT COMPANY NAME

Alternative Placement Site and that our company meets the standards for which an accommodation is granted. I also understand that it will be the responsibility of our company representative to complete the required site visits and report to MPS CCS a student status report which will contain signatures from the identified MPS alternative placement site liaison. I also agree to pay the student worker, at minimum, the City of Milwaukee's Living Wage Rate.

\_\_\_\_\_  
SIGNATURE OF AUTHORIZED COMPANY OFFICER

\_\_\_\_\_  
TITLE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
SIGNATURE OF CCS REPRESENTATIVE

\_\_\_\_\_  
TITLE

\_\_\_\_\_  
DATE