REQUEST FOR PROPOSAL

Well Visit Services
Prepared: February 25, 2020

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I. Introduction and Background:

The Public School and Education Employee Retirement Systems of Missouri (PSRS/PEERS) provide service retirement, disability, and survivor benefits for more than 120,000 active and over 94,000 retired Missouri public school teachers, school employees, and their families. Together, PSRS and PEERS are one of the 50 largest defined benefit plans in the United States with approximately $45.6 billion in assets.

PSRS/PEERS is responsible for taking the necessary steps to provide assurance that benefit recipients are alive and receiving the proper retirement benefit, and that such benefits are terminated at the death of a benefit recipient. PSRS/PEERS reviews death match records to discover deaths of recipients that have not been reported to the Systems, but this process is not always successful in capturing all deaths. Therefore, PSRS/PEERS is seeking the services of a qualified, independent firm that can perform well visits of certain identified benefit recipients and engage in other investigative services as needed. Well visits generally refer to in-person contact with benefit recipients, but may involve the use of software that permits audio/visual contact. The annual number of well visits is estimated at 25-30.

II. Scope of Services

A. Required Services

The firm shall:

1. Conduct periodic well visits of retirees, survivors, and other benefit recipients identified by PSRS/PEERS, both within and without the United States. The scope of such well visits will include a percentage of in-State, out-of-State and foreign-living benefit recipients.

2. The services connected with well visits shall include, but are not limited to:
   a. Conducting benefit recipient location searches;
   b. Contacting benefit recipients by phone or mail to schedule well visits;
   c. Meeting with benefit recipients personally or via software (when appropriate and agreed to by the parties) to verify identity and receipt of benefits, and to gather documentation requested by PSRS/PEERS;
   d. Completing and submitting well visit reports to PSRS/PEERS;
   e. Conducting follow-up well visits as requested by PSRS/PEERS; and
   f. Working with PSRS/PEERS staff to ensure correct information is received on each benefit recipient subject to a well visit and that acceptable well visit reports are submitted.

B. General Duties

The firm shall:

1. Maintain as confidential all information related to PSRS/PEERS in the performance of the well visit services. “All information” includes documents and data received directly from PSRS/PEERS or created by either party in the course of performing the well visit services. The firm shall report any breach of confidentiality to PSRS/PEERS immediately.
2. Identify a main point of contact ("POC") and a backup with whom PSRS/PEERS should communicate for purposes of the services provided, and notify PSRS/PEERS immediately when there is a change of POC and/or the backup.

3. Utilize employees of the firm in performing the well visit services. If employees are not available due to the location of the benefit recipient, notify PSRS/PEERS of the intent to engage an independent contractor to perform the well visit and obtain the approval of PSRS/PEERS prior to such engagement.

4. To the extent that PSRS/PEERS computer systems and/or software programs are used, or confidential information is exchanged electronically, follow all PSRS/PEERS security protocol, which may include the transmission of encrypted email and password-protected attachments.

III. Proposal Specifications

Award of the contract resulting from this RFP will be based upon the most responsive Vendor whose offer will be the most advantageous to PSRS/PEERS in terms of cost, functionality, and other factors as specified elsewhere in this RFP.

PSRS/PEERS reserve the right to:

- Reject any or all offers and discontinue this RFP process without obligation or liability to any potential Vendor
- Accept other than the lowest price offered
- Award a contract on the basis of initial offers received, without discussions or requests for best and final offers.

A. Intent to Respond

If a firm intends to respond to this RFP, a Notice of Intent to do so should be sent to PSRS by March 13, 2020. The Notice should be sent by email to the PSRS contact listed in Paragraph C below, and contain the firm’s name, its intent to respond, the name of a contact person and the contact person’s telephone number and email. Submitting this Notice will not obligate the firm to submit a response but will allow PSRS/PEERS to send out any necessary information to interested firms.

B. Questions Relating to the RFP

All questions concerning this RFP must be received via email by the contact person by March 18, 2020. No other Company personnel are to be contacted in relation to this RFP unless directed to do so by the designated contact person. Compilation of questions and answers will be returned to vendors who have completed the ‘Intent to Respond’.
C. Contacts

Contact person for all responses and communications:

Douglas Schwartz
Purchasing Analyst
PSRS/PEERS
P.O. Box 268
Jefferson City, MO 65102
573-638-2141
Email: DSchwartz@psrsmo.org

D. Response Deadlines

The completed Response must be received by March 27, 2020. Responses received after the response deadline will not be considered.

IV. Selection Process

PSRS/PEERS staff will evaluate all timely and complete responses. PSRS/PEERS reserve the right to request that any response be clarified or supplemented.

Any award to be made pursuant to this RFP will be based upon the proposal with appropriate consideration given to operational, technical, cost, and management requirements. Evaluation of offers will be based upon the Vendor’s responsiveness to the RFP and the total price quoted for all items covered by the RFP.

The following elements will be the primary considerations in evaluating all submitted proposals and in the selection of a Vendor or Vendors:

1. Completion of all required responses in the correct format.
2. The extent to which Vendor’s proposed solution fulfills PSRS/PEERS stated requirements as set out in this RFP.
3. An assessment of the Vendor’s ability to deliver the indicated service in accordance with the specifications set out in this RFP.
4. The Vendor’s stability, experiences, and record of past performance in delivering such services.
5. Availability of sufficient high quality Vendor personnel with the required skills and experience for the specific approach proposed.
6. Overall cost of Vendor’s proposal.

PSRS/PEERS may, at their discretion and without explanation to the prospective Vendors, at any time choose to discontinue this RFP without obligation to such prospective Vendors.
V. Tentative Timetable

The following is the tentative time schedule for PSRS/PEERS’ search for firms to provide the requested information. All dates are subject to modification by PSRS/PEERS.

- Issuance of RFP: March 9, 2020
- Intent to Respond: March 13, 2020
- Question Deadline: March 18, 2020
- PSRS/PEERS response to questions: March 20, 2020
- RFP response deadline: March 27, 2020
- Finalist interviews with staff: March 30/31, 2020
- Selection Made/Project commencement: April 3, 2020

VI. Proposal Content

At a minimum, the proposal should include the following information:

A. Company Data
Include a summary of your company including the length of time in business, narrative of your company’s qualifications to perform the work identified in this proposal, and a brief narrative of similar projects completed, particularly those involving pension plan benefit recipients.

B. Company Contact Information
Include contact data for the primary contact on this RFP. Include name, title, and contact information for the staff you plan to assign to this project. Also include a brief bio for each staff member assigned to this project including their experience, education and work history with your company.

C. Work Plan
- Describe how the vendor plans to perform the well visits, and the efforts the vendor will make to ensure benefit recipients are comfortable with the visit.

- Explain any differences in approach to the well visits based on location (in-state, out-state, foreign, benefit recipients residing in long term care facilities, etc.)

- Provide specific details of any visits that would not be conducted in-person.

- Provide the typical time frame to conduct the on-site visits and provide a final report to PSRS/PEERS.

- Describe the contents of a well visit report (submit template or other proposed document).
• Describe any potential problems anticipated in performing the well visits and the vendor’s approach to resolving these problems.

• Explain any special assistance that will be requested from PSRS/PEERS staff.

D. References
• Provide three (3) clients that we can use as references. The preference is for organizations similar in size and industry to PSRS/PEERS. Each reference shall include:
  o Contact data
  o Description of the scope of the project.
  o Beginning and ending dates of the project.

E. Cost
Provide a fixed-fee cost per well visit, if possible. If not, provide estimates of expected cost per well visit type. Indicate whether the well visit will be in-person or conducted remotely over a secure location. Separately detail any anticipated out-of-pocket reimbursable expenses to be billed to PSRS/PEERS.

F. Additional Information
Provide any additional information you believe is relevant to this project.

VII. Terms and Conditions
PSRS/PEERS makes no representations or warranties, expressed or implied, as to the accuracy or completeness of the information in the RFP and nothing contained herein is or shall be relied upon as a promise or representation, whether as to the past or the future. The RFP does not purport to contain all of the information that may be required to evaluate the RFP and any recipient hereof should conduct its own independent analysis of PSRS/PEERS and the data contained or referenced herein. PSRS/PEERS does not anticipate updating or otherwise revising the RFP. However, this RFP may be withdrawn, modified, or re-circulated at any time at the sole discretion of PSRS/PEERS.

PSRS/PEERS reserves the right, at its sole discretion and without giving reasons or notice, at any time and in any respect, to alter these procedures, to change and alter any and all criteria, to terminate
discussions, to accept or reject any response, in whole or in part, to negotiate modifications or revisions to a response and to negotiate with any one or more respondents to the RFP.

PSRS/PEERS is not and will not be under any obligation to accept, review or consider any response to the RFP, and is not and will not be under any obligation to accept the lowest offer submitted or any offer at all. PSRS/PEERS is not and will not be under any obligation to any recipient of, or any respondent to, the RFP except as expressly stated in any binding agreement ultimately entered into with one or more parties, either as part of this RFP process, or otherwise.

This RFP is not an offer but a request to receive a response. PSRS/PEERS will consider a response as an offer to develop an agreement based upon the contents of the response. Respondents agree that the contents of their responses are valid for one year from the date of submission. PSRS/PEERS will not be liable for any cost incurred in the preparation of a response and will not reimburse any respondents for their submission. Expenses related to the production of a response are the sole responsibility of the respondent.

Vendor acknowledges that, pursuant to the Missouri Open Records Act, section 610.010, et seq., PSRS/PEERS may be required to release to third parties all information provided by Vendor in response to this RFP, regardless if such information is labeled “confidential,” “proprietary” or is otherwise intended by Vendor not to be released to third parties, without providing advance notice to Vendor of a request for such information or the release of such information. By submitting a response, Vendor acknowledges and agrees that PSRS/PEERS shall have no liability to Vendor or to any other person or entity for disclosing information in accordance with the Missouri Open Records Act, as interpreted by PSRS/PEERS.

Vendor acknowledges that all lawsuits involving PSRS/PEERS must be brought in Cole County Circuit Court, Cole County, Missouri, and be subject to Missouri Law, whether or not related to this RFP or any contract or agreement entered into pursuant to this RFP.