



# ROANOKE COUNTY

## FINANCE & MANAGEMENT SERVICES DEPARTMENT PURCHASING DIVISION

### REQUEST FOR PROPOSAL Professional Services

**RFP # 2023-045**  
**On Site Wellness Clinic**

**OPENING DATE: March 29, 2023**  
**OPENING TIME: 2:00 P.M.**

The Request for Proposal and related documents may be obtained during normal business hours from the Purchasing Division, at the Roanoke County Administration Building, 5204 Bernard Drive, Suite 300F, Roanoke, VA 24018. This document may be viewed and/or downloaded from the County of Roanoke Purchasing Division's website at <https://www.roanokecountyva.gov/bids.aspx>. If you have any problems accessing the documents, you may contact Purchasing at (540) 772-2061.

**THIS PUBLIC BODY DOES NOT DISCRIMINATE  
AGAINST FAITH-BASED ORGANIZATIONS**

**DATE of RFP: March 1, 2023**

## REQUEST FOR PROPOSAL (RFP)

RFP No. 2023-045  
Issue Date: March 1, 2023  
Title: Onsite Wellness Clinic

Issued By: **County of Roanoke**  
**Roanoke County Administration Building**  
**Purchasing Division**  
**5204 Bernard Drive, SW, Suite 300-F**  
**Roanoke, VA 24018-0798**  
**Phone (540) 772-2020**

Email: [drago@roanokecountyva.gov](mailto:drago@roanokecountyva.gov)

Sealed proposals will be received on or before 2:00 P.M., March 29, 2023 for furnishing the services and/or items described herein. The time of receipt shall be determined by the time clock stamp in the Purchasing office.

All questions must be submitted before 5:00 p.m. on March 10, 2023. If necessary, an addendum will be issued and posted to the County website on the Current Bids/RFP Requests tab at <https://www.roanokecountyva.gov/bids.aspx>.

If proposals are hand delivered or mailed, send directly to the Purchasing Division at the address listed above. If the Roanoke County Administration Building is closed for business at the time scheduled for the proposal opening, the sealed proposal will be accepted and opened on the next business day of the County, at the originally scheduled hour.

THIS PUBLIC BODY DOES NOT DISCRIMINATE AGAINST FAITH-BASED ORGANIZATIONS.

The County reserves the right to cancel this RFP and/or reject any or all proposals and to waive any informalities in any proposal.

This section is to be completed by the Offeror and this page must be returned with the proposal. In compliance with this request for proposal and subject to all terms and conditions imposed herein, which are hereby incorporated herein by reference, the undersigned offers and agrees to furnish the services and/or items requested in this solicitation if the undersigned is selected as the successful Offeror. Unless the proposal is withdrawn, the Offeror agrees that any prices or terms for such proposal shall remain valid for sixty (60) days after opening. Notices of proposal withdrawal must be submitted in writing to the Purchasing Division.

**Legal Name and Address of Firm:**

\_\_\_\_\_  
Date: \_\_\_\_\_

\_\_\_\_\_  
By: \_\_\_\_\_  
(Signature in Ink)

\_\_\_\_\_  
Name: \_\_\_\_\_  
(Please Print)

\_\_\_\_\_  
Zip: \_\_\_\_\_ Title: \_\_\_\_\_

Phone: \_\_\_\_\_ FAX: \_\_\_\_\_

Email: \_\_\_\_\_ Business License# \_\_\_\_\_

Virginia State Corporation Commission Identification Number: \_\_\_\_\_

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Onsite Wellness Clinic

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COUNTY OF ROANOKE, VIRGINIA  
REQUEST FOR PROPOSAL  
FOR  
On Site Wellness Clinic  
**RFP NUMBER 2023-045**

**INTRODUCTION**

The County of Roanoke, Virginia, is seeking proposals and qualifications from Offerors to provide, On Site Wellness Clinic's in accordance with all terms, conditions and specifications as set out in this Request for Proposal (RFP). The RFP and related documents may be obtained during normal business hours from the Purchasing Division, (540) 772.2020. This document may be viewed and/or downloaded from the County of Roanoke Purchasing Division's Current Bid Opportunities website at <https://www.roanokecountyva.gov/bids.aspx>. If you have any problems accessing the documents, you may contact Purchasing at (540) 772-2020 or [drago@roanokecountyva.gov](mailto:drago@roanokecountyva.gov).

Proposals, to be considered and evaluated, must be sealed and received on or before 2:00 p.m. on March 29, 2023 in the Purchasing Division, County of Roanoke, 5204 Bernard Drive SW, Suite 300- F Roanoke VA 24018. Proposals appropriately received will be opened at this time. **Proposals received after 2:00 p.m. will not be accepted or considered.** The time of receipt shall be determined by the time clock stamp in the Purchasing Office, or if it is not working, such time shall be determined by the Purchasing official who is to open the proposals. Faxed or e-mailed proposals are not acceptable.

Each proposal, one (1) **original, marked as such** and **Ten (10) copies, marked as such**, must be appropriately signed by an authorized representative of the Offeror, and must be submitted in a sealed envelope or package. A removable media storage device containing two (2) digital copies of the proposal, one as submitted, and one **redacted to remove all confidential and proprietary material**, must be included in the proposal packet. The notation "**On Site Wellness Clinic**", **RFP No. 2023-045** and the specified opening time and date must be clearly marked on the front of that sealed envelope or package. If the Roanoke County Administration Building is closed for business at the time scheduled for the proposal opening, the sealed proposal will be accepted and opened on the next business day of the County, at the originally scheduled hour.

The County of Roanoke, Virginia, and its officers, employees or agents will not be responsible for the opening of a proposal envelope or package prior to the scheduled opening if that envelope or package is not appropriately sealed and marked as specified.

The County of Roanoke, Virginia reserves the right to cancel this RFP and/or reject any or all proposals, to waive informalities in any proposal, to award any whole or part of a proposal, and to award to the Offeror whose proposal is, at the sole discretion of the County of Roanoke, determined to be in the best interest of the County.

Project evaluation and award will be accomplished in accordance with this RFP and Section **10.9** of the County of Roanoke Procurement Policy & Procedures Manual. If an award of a contract is made, notification of such award will be posted for public review on the County of Roanoke Purchasing Division's website under Current Bid Opportunities at <https://www.roanokecountyva.gov/bids.aspx> or you may contact Purchasing directly at (540) 772-2020 to request a copy of the award notification.

Unless the proposal is withdrawn, the Offeror agrees that any prices or terms for such proposal shall remain valid for sixty (60) days after opening. Notices of proposal withdrawal must be submitted in writing to the Purchasing Manager.

Inquiries regarding this RFP should be directed Dawn M. Rago, at (540) 283-8150 or via email at [drago@roanokecountyva.gov](mailto:drago@roanokecountyva.gov). Inquiries for information regarding procurement procedures and/or proposal submission shall be directed to the Purchasing Division.

**If you download this RFP from the County website and intend to submit a proposal, you should notify Purchasing that you have done so. However, each Offeror is solely responsible for ensuring that such Offeror has the current, complete version of the RFP documents, including any addenda, before submitting a proposal. The County is not responsible for any RFP obtained from any source other than the County. Contact Purchasing by phone at (540) 772-2020, or by email at [drago@roanokecountyva.gov](mailto:drago@roanokecountyva.gov).**

Respectfully,

Dawn M. Rago  
Senior Buyer

Date: March 1, 2023

County of Roanoke, Virginia  
Request for Proposal No. 2023-045

**On-Site Wellness Clinic**

**SECTION 1. PURPOSE.**

The purpose of this Request for Proposal (RFP) is the procurement of an On-Site Wellness Clinic consistent with the terms and conditions herein set forth. Final scope of services will be negotiated with the successful Offeror. Vendor onsite by needed by September 4, 2023

**SECTION 2. BACKGROUND.**

**Not USED**

**SECTION 3. INSTRUCTIONS TO OFFERORS.**

- A. Proposals must be submitted in accordance with the instructions and requirements contained in this RFP, including the Introduction. Failure to do so may result in the proposal being considered non-responsive and it may be rejected. An Offeror must promptly notify the Purchasing Division of any ambiguity, inconsistency, or error which may be discovered upon examination of the RFP. An Offeror requiring clarification or interpretation of this RFP should contact Dawn M. Rago at (540) 283-8150.
- B. Until such time that an award is published, direct contact with any County employee without the express permission of the Purchasing Manager or her designated representative, on the subject of this proposal, is strictly forbidden. Violation of this Instruction may result in disqualification of Offeror's proposal.
- C. Prospective Offerors, sometimes referred to as providers, operators, contractors, consultants, or vendors, are to address the criteria below at a minimum as part of their submitted proposal. Each proposal should include a transmittal letter and management overview of the proposal. Proposals are to include and may be evaluated on the following factors, together with such other factors as will protect and preserve the interests of the County of Roanoke, which may also be considered.
  1. Organizational structure of firm and qualifications of management personnel. Prospective Offerors should submit at a minimum the length of time in the business, corporate experience, strengths in the industry,

business philosophy, and a description of the organizational structure of the firm; a description of the organizational structure for the management and operation of the services requested and/or provision of the items referred to in this RFP, including an organizational chart denoting all positions and the number of personnel in each position. (See Attachment B)

2. Financial condition of the firm and ability to perform all obligations of any resultant contract.

The sufficiency of the financial resources and the ability of the Offeror to comply with the duties and responsibilities described in this RFP. Each Offeror shall provide a current annual financial report and the previous year's report and a statement regarding any recent or foreseeable mergers or acquisitions. Financial statements may be marked as "confidential" in accordance with the requirements set out in Section 4(A) of this RFP. (See Attachment B)

3. Each Offeror is to state whether or not any of Offeror's owners, officers, employees, or agents, or their immediate family members, is currently, or has been in the past year, an employee of the County of Roanoke or has any responsibility or authority with the County that might affect the procurement transaction or any claim resulting therefrom. If so, please state the complete name and address of each such person and their connection to the County of Roanoke. Each Offeror is advised that the Ethics in Public Contracting and Conflict of Interests Act of the Virginia Code, as set forth in Section 4 of this RFP, apply to this RFP. (See Attachment B)
4. Experience in providing the services and/or items requested by this RFP. (See Attachment B)
5. The ability, capacity, and skill of the Offeror to provide the services and/or items described in this RFP and in a prompt and timely manner without delay or interference.
6. The character, integrity, reputation, judgment, experience, efficiency, and effectiveness of the Offeror.
7. The quality and timeliness of performance of previous contracts or services of the nature described in this RFP.
8. Compliance by the Offeror with laws and ordinances regarding prior contracts, purchases, or services. (See Attachment B)
9. The conditions, if any, of the proposal. (See Attachment B)

- D. Each Offeror should provide the names, addresses, and telephone numbers of at least three (3) references in connection with supplying the services or items requested in this RFP, especially from **other** local government operations similar to those being requested in this RFP by the County. Each reference should include organizational name, official address, contact person, title of contact, and phone number. (See Attachment B)
- E. The proposal should be no more than 25 sheets (printing on back and front is acceptable) in length. Also include any other materials you may want to submit as part of your proposal response.
- F. Responses to this RFP must be in the prescribed format.

Offeror shall provide one redacted copy of its proposal fit for public dissemination, in the event the County must respond to a Freedom of Information Act request. A removable media storage device containing **two (2) digital copies of the proposal, one as submitted, and one redacted to remove all confidential and proprietary material**, must be included in the proposal packet. Offeror shall not mark its entire proposal as confidential and/or redact the entire proposal; doing so may result in the disqualification of Offeror's proposal.

- G. The County may request additional information, clarification, or presentations from any of the Offerors after review of the proposals received.
- H. The County has the right to use any or all ideas presented in reply to this RFP, subject only to the limitations regarding proprietary/confidential data of Offeror.
- I. The County is not liable for any costs incurred by any Offeror in connection with this RFP or any response by any Offeror to this RFP. The expenses incurred by Offeror in the preparation, submission, and presentation of the proposal are the sole responsibility of the Offeror and may not be charged to the County.
- J. Only the County will make news releases pertaining to this RFP or the proposed award of a Contract.
- K. Each Offeror who is a stock or nonstock corporation, limited liability company, business trust, or a limited partnership or other business entity shall be authorized to transact business in the Commonwealth of Virginia as a domestic or foreign business entity if required by law. Each such Offeror shall include in its proposal response the Identification Number issued to it by the Virginia State Corporation Commission (SCC) and should list its business entity name as it is listed with the SCC. Any Offeror that is not required to be authorized to transact business in the Commonwealth as a domestic or foreign business entity as required by law shall

include in its proposal response a statement describing why the Offeror is not required to be so authorized. (See Va. Code Section 2.2-4311.2).

L. Each Offeror is required to state if it has ever been debarred, fined, had a contract terminated, or found not to be a responsible bidder or Offeror by any federal, state, or local government, and/or private entity. If so, please give the details of each such matter and include this information with the proposal response.

## SECTION 4. MISCELLANEOUS.

A. Ownership of Material - Ownership of all data, materials, and documentation originated and prepared for the County pursuant to the RFP shall belong exclusively to the County and be subject to public inspection in accordance with the *Virginia Freedom of Information Act*. Trade secrets or proprietary information submitted by the Offeror shall not be subject to public disclosure under the *Freedom of Information Act*, unless otherwise required by law or a court. **However, the Offeror must invoke the protection of Section 2.2-4342(F) of the Code of Virginia, in writing, either before or at the time the data or other material is submitted. The written notice must SPECIFICALLY identify the data or materials to be protected and state the reason why protection is necessary. The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information.** The classification of an entire proposal document, line item prices, and/or total proposal prices as proprietary, or trade secrets, is NOT ACCEPTABLE and may result in REJECTION of the proposal.

B. As this is a RFP, no information regarding the proposal records or the contents of responses will be released except in accordance with Section 2.2-4342 of the Code of Virginia. Once an award has been made, all proposals will be open to public inspection subject to the provisions set forth above.

C. **IMPORTANT NOTICE - ADDENDUMS AND NOTICES OF AWARD**

Any interpretation, correction, or change of the RFP will be made by an addendum. The County Purchasing Division or its designee will issue Addenda that will be posted to the County website on the Current Bids Opportunities tab at <https://www.roanokecountuya.gov/bids.aspx>.

Interpretations, corrections or changes of this RFP made in any other manner will not be binding and Offerors must not rely upon such interpretations, corrections, or changes.

Vendors may visit <http://roanokecountyva.gov/list.aspx> to sign up to receive emails or text message notices about bids, proposals, addendums, bid tabulation and awards. Vendors can sign up to receive notification in selected commodity/service categories. It is the vendor's responsibility to keep information current in the system in order to receive the notifications. The sign up only requires an email address and/or a cell phone number for receiving text messages (if your phone is capable) and your choice of categories. **However, each Offeror is solely responsible for ensuring that such Offeror has the current, complete version of the RFP documents, including any addenda, before submitting a proposal. The County is not responsible for any RFP obtained from any source other than the County.**

Although 'Notify Me' will be the only way to receive automatic notification, all BIDS/RFP Information will continue to be posted on our website, and can be picked up at the Purchasing Division, 5204 Bernard Drive, Suite 300F, Roanoke, VA 24018. Phone # (540) 772-2020.

The County is not responsible for any IFB obtained from any source other than the County. Contact Dawn M. Rago by phone at 540-283-8150, or by email at [drago@roanokecountyva.gov](mailto:drago@roanokecountyva.gov).

- D. No Offeror shall confer on any public employee having official responsibility for a purchasing transaction any payment, loan, subscription, advance, deposit or money, service, or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value is exchanged.
- E. The County may make investigations to determine the ability of the Offeror to perform or supply the services and/or items as described in this RFP. The County reserves the right to reject any proposal if the Offeror fails to satisfy the County that it is qualified to carry out the obligations of the proposed contract.
- F. The successful Offeror must comply with the nondiscrimination provisions of Virginia Code Section 2.2-4311, which are incorporated herein by reference.
- G. The successful Offeror must comply with the drug-free workplace provisions of Virginia Code Section 2.2-4312, which are incorporated herein by reference.
- H. It is the policy of the County of Roanoke to maximize participation whenever possible by minority and women owned business enterprises in all aspects of County contracting opportunities.
- I. The successful Offeror shall comply with all applicable County, State, and Federal laws, codes, provisions, and regulations. The successful Offeror shall not during the performance of any resultant contract knowingly employ an unauthorized alien as defined in the federal Immigration Reform and Control Act of 1986.

- J. Providers of any outside services shall be subject to the same conditions and requirements as the successful Offeror in regards to law, code, or regulation compliance. The County reserves the right of approval for any subcontract work, including costs thereof.
- K. Ethics in Public Contracting. The provisions, requirements, and prohibitions as contained in Sections 2.2-4367 through 2.2-4377, of the Virginia Code, pertaining to bidders, offerors, contractors, and subcontractors are applicable to this RFP.
- L. Conflict of Interests Act. The provisions, requirements, and prohibitions as contained in Sections 2.2-3100, et seq., of the Virginia Code are applicable to this RFP.
- M. The procurement provisions of the Virginia Public Procurement Act as well as the County Procurement Manual, apply to this RFP, unless specifically modified herein. The County's Procurement Manual can be reviewed on the County's electronic procurement website.
- N. Insurance Requirements:  
Successful Offeror, and any of its subcontractors, shall, at its sole expense, obtain and maintain during the life of the resulting Contract the insurance policies and/or bonds required. Any required insurance policies and/or bonds shall be effective prior to the beginning of any work or other performance by successful Offeror, or any of its subcontractors, under any resultant Contract. The policies and coverages required are those as may be referred to in the sample contract and/or the terms and conditions attached to this RFP. All such insurance shall be primary and noncontributory to any insurance or self-insurance the County may have.

## SECTION 5. PROTESTS.

Any Offeror who wishes to protest or object to any award made or other decisions pursuant to this RFP may do so only in accordance with the provisions of Sections 2.2-4357, 4358, 4359, 4360, 4363, and 4364 of the Code of Virginia, and only if such is provided for in such Code section. Any such protest or objection must be in writing signed by a representative of the entity making the protest or objection and contain the information required by the applicable Code Sections set forth above. Such writing must be delivered to the County Purchasing Manager within the required time period.

## SECTION 6. SERVICES AND/OR ITEMS REQUIRED.

**A description and/or listing of the services and/or items that the successful Offeror will be required to provide to the County under this RFP are those that are set forth**

in this RFP, below, referred to in any way in the sample contract, in any terms and conditions, and/or in any attachments to this RFP.

Each Offeror should carefully read and review all such items and should address such items in its proposal. However, the final description of the services and/or items to be provided to the County under this RFP is subject to negotiations with the successful Offeror, and final approval by the County.

Such services will include, but are not necessarily limited to, the following:

### **Section 1. Company Overview:**

**1. Client Name:** The County of Roanoke, Virginia

**2. Industry Sector:** Public

**3. Demographics:**

**County- 964 eligible employees, 215 eligible spouses, 83 retirees and 21 retiree spouses**

**Schools- 2222 eligible employees, 1572 currently have insurance and are eligible to attend health clinic. 90 retirees are eligible to use health clinic. In addition, we have approximately 165 bus drivers that need DOE physicals each year. We also have 934 spouses on insurance that we would like to offer them use of Vendor chosen for sick visits only.**

**WVRJ-144 eligible employees, 37 eligible spouses**

### **Section 2. Eligibility**

Please define current eligibility rules for accessing clinic services

- a. County - Employees, Retirees and their Spouses that are covered through the County's Health Insurance
- b. **Schools - Contracted Employees and Retirees that are covered through the school's health insurance. Spouses enrolled in the insurance plan will be newly eligible this year.**
- c. **WVRJ - Employees and their Spouses that are covered through the WVRJ's Health Insurance**

### **Section 3. Clinic Overview**

**1. Number of clinic sites and their locations: 2**

- a. **County Location - 2741 Penn Forest Blvd. Roanoke, VA 24018- Attachment No. 1 Floor Plan**
  - i. **Used by County employees, spouses, and retirees for acute visits and wellness and coaching visits**

- ii. Used by Schools employees, spouses, and retirees for acute visits only
- iii. Used by WVRJ employees and spouses for acute visits only

b. Schools Location - 5937 Cove Rd. Roanoke, VA 24019-Attachment No. 2 Floor Plan

- i. Used by Schools employees, spouses, and retirees for acute visits, and wellness, and coaching visits
- ii. Used by WVRJ employees and spouses for both acute and coaching visits
- iii. Used by County employees, spouses, and retirees for acute visits only

**Floor plans & Square Footage for each location:**

The floor plans and square footage for each location is attached.

**2. Equipment:** An itemized list of all equipment and signify ownership and status including approximate remaining useful life, maintenance, and calibration logs

This information for each clinic site is attached.

**3. Phones, Telecommunication, Wireless Access and Phone Line Ownership:**  
List lines, types of lines, provider and ownership/billing status.

- a. County- Attached in email
- b. Schools- Schools will provide dedicated, unrestricted, business class DSL or business class cable services. Ethernet handoff to be implemented into a health clinic owned and operated firewall/router. Schools are responsible for premise wiring to facilitate connectivity from the clinic firewall to the desktops. *Two jacks are provided for each employee station.* Schools will provide minimum bandwidth requirements of 5 mbps up and 15 mbps down, and 1 publicly addressable IP address. Schools provide and pay for modem and internet connectivity only

**4. Facility refresh and repaint:** Is there a need/ability to refresh the facility and who provides said services

**There is not a need to refresh and repaint the facilities at this time.**

**5. Facility services:** Who provides and pays for the following:

a. **Janitorial services**

**These services are provided by the County or Schools at their respective facility and is paid for by the County or Schools (for their facility).**

b. **Waste and/or Hazardous Material Collection & Disposal**

- i. **County Handled by Vendor (we can handle sharps container only)**
- ii. **Schools- Trash handled by Schools and is paid for by Schools. Hazardous Material Collection and Disposal handled by appropriate vendors and is paid for by Vendor.**

c. **Facility maintenance**

**Facility maintenance is handled and paid for by the County or Schools at their respective facility.**

d. **Grounds maintenance**

**Grounds maintenance is handled and paid for by the County or Schools at their respective facility.**

**6. Requested Hours of operation:**

- a. **County Location – Monday - Thursday: 7am - 5pm Friday: 7am - 12pm for Penn Forest Location (We would like for this to be 5 days per week)**
- b. **Schools Location - Monday thru Thursday 7:00am – 6:00pm; Friday 7:00am – 1:00pm.**

**7. After-hours care:** What, if any, after-hours care is provided and by whom

**N/A**

**8. Encounter Length:** What is the scheduled clinic encounter/visit duration based on type of service: Acute, Primary Care, Occupational Health, Health Coaching

- a. **County - Acute- 40 minutes, Primary Care- 40 minutes, Occupational Health- 40 minutes, Health Coaching- 40 minutes**
- b. **Schools- Acute simple - 20 minutes; Acute complex – 30 minutes; Primary Care – 40 minutes; Occupational Health – 40 minutes; Health Coaching – 40 minutes**

## Section 4. Population-Specific Demographics

### 1. Average Age of Members:

**For all three organizations, the average age ranges from 38 to 46.7 years.**

### 2. Ratio of male to female employees:

**Female – 63.8%; Male – 36.2%**

### 3. Average hourly wage of employees:

Depending on the organization, the average hourly wage ranges from \$26.62 to \$33.19.

### 4. Top 5 chronic conditions:

**Osteoarthritis except for low back, Heart Failure, Coronary Artery Disease, Gallbladder Disease, Peripheral Vascular Disorders**

## Section 5. Technology

### 1. What is the current Electronic Health Record (EHR) system used for primary care today?

a. **Athena**

### 2. EHR used to capture occupational health services: If applicable and different from above

a. **Athena**

### 3. Who owns EHR for occupational health: If applicable

a. **N/A**

### 4. Is the desire to keep the current occupational health EHR platform in place or to utilize the vendor partners platform?

**No preference as to the EHR platform as long they accept all data feed files in our current format (included)**

## Section 6. Current Scope of Services

1. Primary Care:

**Covered**

2. Acute Care:

**Currently Covered**

3. Pre-employment physicals:

- a. **County** - Not Covered
- b. **Schools** - Bus Drivers only (DOE Physicals)
- c. **WVRJ** – Not covered

4. Disease management:

**Currently Covered**

5. Pharmacy:

**Will write prescription only; no dispensing of medication**

6. Labs:

**Currently Covered (at cost to employee) Would like quote with and without labs included**

7. Mass Biometric events: Currently Covered

a. Past/Projected engagement in biometric events:

- i. **County** - Vendor Previously identified and helped manage biometric events. We had two poor experiences with their sub-vendor and little/nothing was done to address the concern. We have had to manage it ourselves and identify a different vendor on our own. The Biometric events will no longer be required with the update to our Wellness plan, but we would like for the vendor to have the ability to provide them if needs change over time.
- ii. **Schools** - Our team has done a great job in the past with managing biometric events at the school level and biometric appointments in their office. Would like to continue with same plan.
- iii. **WVRJ** - The jail does not have a wellness plan/special rate for completing any wellness requirement such as biometrics, etc. However, the current vendor does work with HR to schedule quarterly biometric screenings at the jail's facility for those

**employees who wish to participate, and these run very smoothly. The vendor also schedules monthly one day/3-hour onsite clinics at the WVRJ for employees to be seen for health coaching, acute visits, etc. These also work very well.**

**8. Wellness program information:**

**a. Program Requirements:**

- i. County - Completion of wellness or preventative screening through vendor, PCP or County required physical once per year for employee, retiree and spouse only if they are covered under County insurance. Will look to vendor for recommendations for other requirements.**
- ii. Schools- 3 steps to wellness completed thru health clinic. Health Risk Assessment, Biometrics and Comprehensive Health Review. Biometric screening/physical can also be certified by PCP. Employees only required to complete wellness. Spouses not required to complete unless they are also on insurance and have school couple rate.**
- iii. Jail-The jail does not have a wellness program/rate for employees. Employees may of course participate in any disease management or coaching voluntarily.**

**b. Program Vendor:**

**Currently is: Marathon Health**

**c. Incentive Type:**

- i. County - HRA contribution**
- ii. Schools- Reduced rate for health insurance.**

**d. Current wellness program participation rate:**

- i. County - 91.7%**
- ii. Schools- 81.9%**

**e. Wellness program components:**

- i. County - Completion of wellness or preventative screening through vendor, PCP or County required physical once per year for employee, retiree and spouse only if they are covered under County insurance. Will look to vendor for recommendations for other requirements.**

- ii. Schools- 3 steps to wellness completed thru health clinic. Health Risk Assessment, Biometrics and Comprehensive Health Review. Biometric screening/physical can also be certified by PCP. Employees only required to complete wellness. Spouses not required to complete unless they are also on insurance and have school couple rate.
- f. Virtual/telehealth options:  
**Yes, include both options**

## Section 7. Benefit/Plan Design

1. Summary claims data:
  - a. Carrier/TPA: Anthem Medical; WellDyne Pharmacy, currently
  - b. Funding Arrangement: Self-Funded
  - c. Plan Design(s): \$1,000/ \$2,000 deductible, then 20%, to \$3,500/\$7,000 out-of-pocket maximum in network
  - d. Provider office visits per 1000; the average cost of a provider visit: 2,107.4/1,000; \$110 average cost per visit
  - e. Lab and Pathology visits per 1000; average costs of a lab encounter: 1,844.3/1,000
  - f. Specialist visits per 1000; average cost of a specialist visit; specialist visits by specialist type (physical therapy, chiropractic, pediatric, psychiatry, radiology, pathology, etc.): 8,729.4/1,000 specialist visits per 1000; for visits by specialty, see pdf titled Utilization by Professional Specialty
  - g. ER visits per 1000; the average cost of an ER/urgent care visit: ER 128.2/1,000; average cost for ER visit \$1,253
  - h. Hospital inpatient admissions per 1000; the average cost of an inpatient admission: 44.2/1,000; \$30,003 per admission
  - i. The top cost drivers in terms of medical spend: 1) Neoplasms \$2,403,541; 2) Circulatory \$2,301,596; 3) Health Status \$2,289,604; 4) Musculoskeletal \$2,238,456; 5) Digestive System \$1,441,234; 6) Injury & Poisoning \$1,380,546; 7) Nervous System \$1,165,985; 8) Maternity \$1,100,273; 9) Ill-Define Conditions \$998,229; 10) Genitourinary System \$954,704

## Section 8. Chronic Condition Management & Occupational Health

1. **Current Programming:** Carrier embedded disease management programs
2. **Incentives:** No incentive to participate in carrier disease management program
3. **Occupational Health Services Provided Annually:** The only occupational health services provided in the clinic are for Schools DOE physicals

## Section 9. Additional Services to be Quoted as an Option

The following services are not currently conducted in the clinic. Provide incremental cost to add these services. Roanoke will consider these alternatives separately and may or may not add one or all in the final services to be provided.

1. **Flu Shots:** The County and Schools are interested in covering flu shots that are administered in the clinic on an office visit basis. WVRJ uses in-house resources to provide flu shots and will not add this service.
2. **Pre-employment physicals:** WVRJ would like to see the cost to include pre-employment physicals.
3. **WVRJ - The jail does require all employees to undergo a complete physical (non-DOT) with a drug screen & TB test, but it is currently done through Carilion Occupational Health. We would be interested in pricing for the opportunity to add this as a service with a new vendor. We also use Carilion Occupational Health for both Fit for Duty and Return to Work physicals and would be interested in pricing for both of those as well through a new vendor.**
4. **WVRJ - For worksite injury/illness (worker's comp) we use VACORP currently and were told we could not use our current vendor as a worker's comp vendor when we tried to do so in the past. We would also be interested in pricing for this service.**
5. **County – The County does not currently offer a monthly one day/3-hour onsite clinic for employees to be seen for health coaching, acute visits, etc; however, we would be interested in pricing for this service.**

## EXPECTATIONS FOR THE CLINIC SCOPE OF SERVICES

The following information describes The County's requirement of services to be provided:

### Acute and Episodic Care

Assessment and treatment of medical conditions that are episodic in nature and short in duration. Examples include, but are not limited to, upper respiratory infections, rashes, urinary tract infections, and first treatment of minor on-site injuries.

## **Management of Chronic Conditions**

Management of chronic conditions for individuals who do not have a primary care provider. Examples include, but are not limited to, hypertension, hypothyroidism, allergic rhinitis, hypercholesterolemia, and diabetes.

For those individuals with an existing primary care provider and/or specialist, and for those individuals who have multiple complicated medical conditions requiring specialty care and/or significant oversight, the clinic health care provider will work in collaboration with said provider to provide adjunct care and education to the patient.

For those individuals who do not have a primary care provider, clinic vendor can function as the medical home and provide full primary care, including the management of multiple chronic conditions requiring significant oversight. After hours coverage and in-hospital care not included. The clinic health care provider will work in collaboration with specialty care providers if specialty referral is indicated.

### **Routine annual exams, pre-employment, and screenings.**

- Annual Physicals – Includes a physical exam. Any required external lab processing and imaging is not included in the annual fees.
- Annual women's health exams to include pelvic exam and pap smear. Pap smear requires external lab processing not included in the annual fees.

### **Lab Draws**

- Labs may be drawn for diagnostic and monitoring purposes at the recommendation of the onsite Care Provider. The cost of external lab processing is a third-party charge to patients that is not included in the annual fee.
- Vaccines: Administered at no cost with clinic vendor's cost of vaccine passed through as incurred.
- Processed in-house during the provision of care, as needed (pending review of state regulations). The following tests are required to be included in the annual fee: Hemoglobin A1C, Fecal Occult Blood Test, Glucose, HCG Pregnancy, Lipid Profile, Mono, Strep A, Urinalysis.

### **Health Risk Assessment**

- Administered online or in paper version screens.
- General health and well-being
- Health history including symptoms, conditions, and family history.
- Tobacco use, alcohol use and stress levels.

### **Health Coaching**

- For high-risk individuals and individuals with chronic disease
- Online access to tools and resources for self-care

- 1:1 consultation with the onsite Care Provider to review assessment results, health history and risk appraisal, set goals and recommend strategies to achieve goals.

### **Lifestyle Risk Reduction**

- For high-risk individuals agreeing to follow-up with the clinic health care provider as their personal health coach
- Work 1:1 with individuals to change behaviors putting them at risk for certain conditions, addressing lifestyle habits such as physical activity, smoking, diet, stress, weight control, high cholesterol, and high blood pressure.
- Individualized change management plans
- Proactive support

### **For individuals with chronic diseases (Diabetes, chronic obstructive pulmonary disease (COPD), asthma, heart failure, heart disease, high blood pressure, depression, low back pain)**

- Work 1:1 with individuals to empower and educate them to improve their health and quality of life through self-management practices and adherence to a treatment plan that aligns with national clinical guidelines for their disease.
- Coaching, symptom monitoring, and disease education

### **Health Engagement System Technology Platform (for up to 110% of the employees and spouses eligible to participate)**

- Personal Health Record with risk profile, wellness score, interactive nutrition and activity trackers, and medical content
- Online scheduling system and secure messaging
- Electronic Medical Record
- Ability to import encounter data from carrier to provide historical patient encounter information.
- Export up to three (3) types of data feeds (encounter, lab, or HRA) in clinic vendor's standard format.

### **One Point of Contact**

An assigned Account Manager provides one point of contact for triaging issues that may be handled by clinic vendor's team of analysts, Care Providers, communications resources, and others to ensure any issues are identified and addressed quickly.

### **Clinical Coverage Plan**

Clinic vendor will establish and provide a coverage plan for clinical staff absences due to illness, vacation or continuing medical education (CME) time off.

### **Monthly Reviews**

Account Manager will hold monthly calls with The County to deliver and discuss the reports described below to ensure that The County has data on health center activity and progress toward goals.

## **Annual Review**

Account Manager will provide face-to-face annual reviews of the health center business, incorporating The County-specific key performance metrics from the previous year, as well as a strategic plan for the next year.

## **Ongoing Health Promotions**

Account Manager will work together with The County to manage ongoing communications for the promotion of health center services and operations.

## **Strategic Planning**

Account Manager will work to understand and support client's unique business objectives and goals for the health center. The Account Manager will work collaboratively with The County's broker/consultant, as well as other health related vendors (EAP, DM, etc.) as needed to ensure that employee health resources are fully leveraged.

## **Monthly client activity and trends report**

Including visit volume (visits for acute care, occupational health, risk reduction and chronic condition management, group work and telephonic consults), high risk patients engaged, high risk patients making progress, encounters by CPT code, diagnoses by ICD-9 code, prescriptions written, and overall savings from operations

## **Annual reports including:**

- Population stratification report identifying percent of the population screened, size and nature of high-risk population and size and nature of population with chronic conditions identified through data mining and/or screening.
- Review of health center operations including health center volumes and patient engagement.
- Examination of outcomes including overall improvement in population health status, patient satisfaction, savings from health center operations and return on investment analysis, results of at-risk pay-for-performance metrics, and plan for continuous quality improvement.

## **SERVICES NOT EXPECTED TO BE INCLUDED IN ANNUAL FEE:**

- Flu vaccine and related supplies supplied at current rates.
- Mass population biometric screening fees at quoted rates. Actual fee is dependent on number of individuals screened and the number of locations. Individual in-house biometric screenings and all health risk assessments are included in the annual service fee.
- Travel costs for health center staff and health screeners to visit participants at offsite locations.

## **COMPLAINT NOTIFICATIONS/LAWSUITS**

- a. As part of its bid or proposal, Proposer shall provide to The County a list of all instances within the past ten (10) years where a complaint was filed against Bidder or Proposer in a legal or administrative proceeding, regardless of whether the complaint has been resolved or is currently pending, alleging that Proposer discriminated against an employee, independent contractor, subcontractor, vendor, supplier, or commercial customer on the basis of race, gender, gender identity or expression, religion, national origin, ethnicity, sexual orientation, age, or disability in violation of applicable Federal and/or Florida law.
- b. The Proposer must provide a description of each of the complaint(s) and: (i) the terms of resolution of all adjudicated/settled complaints, including any remedial action taken by Proposer; and (ii) the status of, and Proposer's response to, all pending complaints.
- c. Proposer shall provide a description of any lawsuits and the resolution of any such suit brought against your company during doing business in relation to providing on-site medical services within the past (10) years.
- d. The Company will consider a Proposer's complaint history information and lawsuit information in its review and determination of responsibility. The failure of a Proposer to comply with the requirements in this Section may result in Proposer being deemed non-responsive by the Purchasing Manager. If no complaints or lawsuits have been filed within the last ten (10) years, please so state on Company Letterhead and upload with your response.

## QUESTIONNAIRE

### Legal information

1. Provide details (carrier, period limits, and deductibles) for the following insurance coverages related to on-site clinics and staff for the items listed on lines 7 through 12, please see Insurance Requirements attached:
  - a. Property Insurance
  - b. General Liability
  - c. Excess Liability
  - d. Workers' Compensation/Employers Liability
  - e. Employee Dishonesty/Crime Coverage
  - f. Medical Professional Liability

2. Describe any lawsuits and the resolution of any such suit brought against your company during the course of doing business in relation to providing on-site medical services.
3. Please provide any state board infractions or cases pending against you in any disciplines including but not limited to nursing, physician, pharmacy.
4. Describe your HIPAA compliance program.
5. Have you ever been fined or sanctioned for a breach under HIPAA?
6. Explain your process for handling a HIPAA breach.
7. How has your firm indemnified, to the degree possible, your clients from medical malpractice liability? Please describe this program in detail.
8. What consulting services do you provide relating to compliance concerns for employer group health plans?
9. Describe your recommendations for providing services to an employer group health plan that provides benefits through a high deductible health plan that is H.S.A. compatible.

## **General Information**

1. If your proposal does not comply with the specifications outlined in the Summary of Requirements or Submission Requirements in any way, please explain all deviations in detail.
2. Please provide a brief history of your organization, including how long you have been providing employer-sponsored health centers and the number you currently manage.
3. Please provide three companies that would be willing to serve as a reference for your services.
4. Please provide the total number of clients who have terminated your service for employer-sponsored health center services over the past 3 years and include why.
5. Describe how your organization distinguishes itself from your competitors and if you have any unique offerings for THE COUNTY OF ROANOKE, VA.
6. How do you measure the success and outcomes of the health center? Please be specific.
7. Please explain your account management structure.

8. Do you have a separate team that manages your implementations? If so, describe the structure of that team

## **Staffing and Utilization**

1. Confirm your ability to open THE COUNTY OF ROANOKE, VA's health center in September 2023. If not, please indicate when you could reasonably open the health center. Needed specifically by September 4, 2023,
2. How do you determine health center eligibility?
3. Based on the supplied employee and dependent census information what type/how much staffing would you propose to meet the needs of the employer?
4. Do you have any experience working with multiple employers sharing a network of health centers? If so, please explain in detail how you separate expenses, set health center hours and coordinate all sharing partners?
5. Who owns the space – you or the employer? Do you have flexibility on the ownership/leasing arrangement?
6. Describe how you project utilization over the first three (3) years and how staffing requirements are impacted. Please also reflect this within the cost proposal document.
7. Describe your recruitment process for providers and ancillary staff. Does THE COUNTY OF ROANOKE, VA have the opportunity to take part in this process?
8. Describe your process for training health center staff, both at hire and ongoing.
9. How do you handle replacing health center staff should there be a termination?
10. How do you provide coverage when health center staff members are sick or on vacation? Do you use temp agencies for this staffing?

## **Medical Services**

1. How will you ensure all results are communicated to a patient's PCP or other physicians?
2. How will you handle situations when a patient does not have a PCP? Are your providers willing to fill that role if requested?
3. Do you employ a Medical Director? Describe their tasks and how often they meet with staff.
4. Describe your company's clinical quality assurance program.

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5. Describe your approach to handling patient referrals? Aside from using the network physicians, how will you determine what physicians to refer patients to in the case of needing to refer a patient for specialty services? What is your process for following up on results?
6. Are you affiliated with any outside physicians and/or hospitals? Do you refer to specific healthcare organizations?
7. What is the minimum age for health center care?

### **Pharmacy and Lab Services**

1. Does your health center formulary dispense generic, brand or both? Are medications dispensed at the health center or sent to a retail pharmacy?
2. Can a prescription from outside providers be filled at the health center location? Do you monitor potential adverse medication interactions?
3. Do you have an established discount arrangement with a lab vendor? If so, please provide their information and who will assist with testing and reporting.

### **Marketing and Communication**

1. For health center opening, describe how you would ensure successful utilization of the health center? What role does the employer play in this?
2. Post health center opening, describe your marketing plan philosophy with specific examples of collateral formats (i.e., email, poster, flyer), distribution methods and recommended frequency. Is there any additional cost for these services? If so, please also reflect this within the cost proposal document.
3. Do you have dedicated marketing staff that will assist in development of client specific materials? Please include samples of customized marketing materials that have been developed. Is there any additional cost for these services? If so, please also reflect this within the cost proposal document.
4. Do you provide employee education in the form on onsite presentation sessions and/or recorded video or webinar? Does your staff develop and conduct the presentation? Is there any additional cost for these services? If so, please also reflect this within the cost proposal document.

### **Technology**

1. What Electronic Medical Record (EMR) do you use?

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2. Is this EMR interoperable? If so, what are the benefits to the client and the employees?
3. Do you have online scheduling capabilities for patients? If so, for your book of business, what percentage of appointments are made using this functionality?
4. Do you have telephonic scheduling capabilities, such as a toll-free line, after health center hours? If so, please indicate what hours it is available.
5. Does your technology prompt or send reminders for scheduled appointments? If so, please describe.
6. Do you have a patient portal? If so, describe the functionality offered on the portal. Describe any mobile platform integration that exists. Please describe the ability to personalize the portal to suit the entities needs.
7. Are patients able to access their medical record electronically? What, if any, impact is there if the employee is no longer affiliated with the organization or if the contractual relationship between the employer and the health center vendor is terminated?

### **Reporting and Data Integration**

1. Do you currently submit medical claims, either zero dollar or for a defined amount, to MEDICAL CARRIER / HEALTH PLAN in any of your existing health centers?
2. Do you require any claims data from the medical insurance carrier and if so with what frequency and format?
3. How do you handle eligibility files? How often do you require submission?
4. Provide sample standard reporting of utilization and health center activity. Indicate the standard frequency of each report.
5. Do you provide access to real-time or near-time reporting that is accessible by the client or their designated representative? If so, please explain and provide a sample.
6. Is there any additional cost for customized or adhoc reporting?
7. Provide a summary of reports that clients can expect to receive. Attach samples of all reporting.
8. How often will your company provide such reporting and review it with the client?
9. Please provide reporting for no shows and unfulfilled requested appointments.
10. Do you offer real-time, self-service reporting capabilities?
11. Please provide samples of actual, de-identified client reports illustrating the integration claims and utilization data with the carrier or TPA data.

12. Describe your cost avoidance or value proposition, including your methodology for calculating cost avoidance. Include case studies, if available.
13. Describe how your company demonstrates improvements in the health of participants in your program over time, both individually and population-wide. What metrics are tracked and how often are they presented to clients?
14. Do you conduct satisfaction surveys with employees? If so, how are these conducted and what have been the results?
15. Please provide reports for referral services, including outcomes and utilization of service.

### **Health Center Management**

1. Is equipment purchased or leased to THE COUNTY OF ROANOKE, VA?
2. Is staff or health center compensation tied to performance metrics? If so, please list the metrics.
3. How do you measure and ensure employer satisfaction? Please provide samples.
4. How do you measure and ensure patient satisfaction? Please provide samples.
5. What is your policy/procedure for handling patient complaints?
6. How do you handle urgent care/same day requests? Do you allow walk-ins?
7. Do you provide services to any clients who offer a health savings account (HSA)? What pricing models do you use for services and how are you able to track when an HSA plan member reaches their deductible so that their HSA tax favored status is not compromised?

### **Chronic Condition Management / Wellness Services**

1. Describe your philosophy on using health risk assessments (HRA). Is your HRA available online? can you integrate with current carrier offering(s)?
2. What is your capability for providing biometric screenings, i.e., in the health center or at various locations?
3. How would you handle urgent situations found upon screening?
4. List which tests are included in your biometric panel. Are biometric screenings completed via venipuncture or finger stick?
5. Do you have resources to help with wellness programs that are available to THE COUNTY OF ROANOKE, VA's employees, but not part of the health center staff, such as dietitians, behavioral health coaches, diabetes educators, etc.? What are their credentials? Is this an additional cost?

6. What wellness services are included at no additional cost (i.e. challenges, wellness portal, etc.)?
7. Do you provide a wellness portal? What functionality does it provide (i.e. challenge administration, incentive tracking, coaching, outcomes, education, etc.)?
8. Do you provide any specific disease management or condition management programs? Please list and briefly describe all programs.
9. Please provide samples of your wellness communication materials.

### **HIPAA & Security**

1. How are medical records stored and confidentiality assured? On/off-site?
2. Describe your HIPAA compliance, GINA compliance and security processes.
3. Describe any reportable breaches you have had in security and how they were handled.

### **Financial**

1. Please complete a three (3) year ROI projection in the excel format cost proposal provided with this RFP, that meets the requirements. If you proposed an additional staffing model, please complete a separate cost proposal / ROI projection sheet for that model. This cost proposal, including the three (3) year ROI projection should be submitted, separately from the written proposal, by email in Excel format.
2. Please describe your philosophy regarding your pricing model (i.e., inclusive fixed fee versus cost-plus, etc.). Please provide supporting information explaining methodology and impact to the client.
3. How do you handle the fees collected for visits or medications? Do you offset your fees by any collections?
4. Will you provide performance guarantees? If so, describe them and the amount (actual dollars or percentage of fees, please be specific) you are willing to put at risk. Be sure to include a list of the specific metrics or services on which you are willing to guarantee your performance

### **Performance guarantees**

Please describe your performance plan based on the achievement of key performance metrics in the following key results areas:

1. patient experience
2. population health outcomes
3. per capita cost reduction

4. Document the percent of annual base service fees that are “at-risk” for each key result area.

## **EXHIBITS SPREADSHEETS.**

### **EXHIBIT A SCOPE OF SERVICES**

Please confirm what services are included in the Annual Operating Costs. For those items not included in the Annual Operating costs, please provide the cost per participant fee.

### **EXHIBIT B STAFFING BREAKDOWN**

On the Lab Fees tab, we have attached a list of comprehensive lab tests. If your company provides any of these tests as part of the clinic operations, please confirm the cost for each test.

### **EXHIBIT C CLINIC LAB FEES**

On the Lab Fees tab, we have attached a list of comprehensive lab tests. If your company provides any of these tests as part of the clinic operations, please confirm the cost for each test.

### **EXHIBIT D CLINIC PHARMACY FEES**

On the Pharmacy Costs tab, we have attached a list of standard generic medications. Please confirm the unit cost for each of these medications.

### **EXHIBIT E CLINIC BUDGET**

As part of the staffing and clinic management proposal, please complete the Budget for (1) Start-up and the following calendar years: (2) 2023, 2024, and 2025. Please only use the attached budget to submit your organization’s costs.

## **OPERATING COSTS**

### **1. Salaries, Wages, and Benefits**

- Dedicated on-site clinic salaries, wages, and benefits.
- Any replacement costs incurred by the site.
- Non-dedicated salaries, wages, and benefits including Family Practice, Physical Therapy, and Wellness (Dietitian)

### **2. Medical Supplies**

- All medical and pharmacy supplies, and immunizations

### **3. Supplies and Fees.**

- Office supplies
- Cost of HRA forms
- All IT-related costs, including payment processing fees.

- 4. Technology Services**
- 5. Insurance**
- 6. Other Expenses**
- 7. Management Fees**
- 8. Total Operating Fees**

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## SECTION 7. EVALUATION CRITERIA.

Offerors will be evaluated for selection on the basis of those most qualified to meet the requirements of this RFP. The County of Roanoke does not use a numerical or weighted scoring system when evaluating selection criteria. Major criteria to be considered in the evaluation may include, but shall not necessarily be limited to, the items referred to above and those set forth below:

- A. The background, education and experience of the Offeror in providing similar services or items elsewhere, including the level of experience in working with municipalities and the quality of services performed or items supplied.
- B. The Offeror's responsiveness and compliance with the RFP requirements and conditions.
- C. Determination that the selected Offeror has no contractual relationships which would result in a conflict of interest with the County's contract.
- D. The Offeror's ability, capacity and skill to fully and satisfactorily provide the services and/or items required in this RFP.
- E. The quality of Offeror's performance in comparable and/or similar projects.
- F. Whether the Offeror can provide the services and/or deliver the items in a prompt and timely fashion.
- G. Offeror's willingness to accept the County's sample contract (Attachment A).

## SECTION 8. SELECTION PROCESS.

A. Pursuant to Section 2.2-4302.2 (A)(4) of the Code of Virginia, selection of the Offeror will be as follows:

1. The County's designee, shall engage in individual discussions with two or more Offerors, if there be that many deemed fully qualified, responsible and suitable on the basis of initial responses with emphasis on professional competence to provide the required services. Repetitive informal interviews shall be permissible. Such Offerors shall be encouraged to elaborate on their qualifications and performance data or staff expertise pertinent to the proposed projects as well as alternative concepts. These discussions may encompass nonbinding estimates of total project costs including, where appropriate, design, construction, life cycle cost, nonbinding estimates of price for services, and other matters. Methods to be utilized in arriving at a price for services may also be discussed. Properly designated proprietary information from competing Offerors shall not be disclosed to the public or competitors, except as may be required by law.
2. At the conclusion of discussions, outlined in the paragraph above, on the basis of evaluation factors published in the RFP and all information developed in the selection process to this point, the two (2) or more Offerors whose professional qualifications and proposed services are deemed most meritorious shall be ranked in order of preference.
3. Negotiations shall then be conducted, beginning with the Offeror ranked first. If a contract satisfactory and advantageous to the County can be negotiated at a price considered fair and reasonable, the award shall be made to that Offeror. Otherwise, negotiations with the Offeror ranked first shall be formally terminated and negotiations conducted with the Offeror ranked second, and so on until such a contract can be negotiated at a fair and reasonable price. Should the County determine in writing and in its sole discretion that only one Offeror is fully qualified, or that one Offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that Offeror.

B. All proposals submitted in response to this RFP will be reviewed by the Purchasing Division or its designee for responsiveness prior to referral to a selection committee or person. A committee consisting of County personnel and/or others and/or an appropriate individual will then evaluate all responsive proposals, conduct the negotiations, and make recommendations to the County as appropriate. The award of a contract, if made, will be made to the Offeror whose proposal best furthers the interest of the County. The County reserves the right to reject any and all proposals, to waive any informality or irregularity in the proposals

received, and to make the award to the Offeror whose proposal is deemed to be in the best interest of the County.

- C. Oral Presentation: Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to the selection committee or person. This provides an opportunity for the Offeror to clarify or elaborate on the proposal. This is a fact finding and explanation session only and does not include negotiation. Oral presentations are strictly at the option of the County and may or may not be conducted.
- D. The County reserves the right to make multiple awards as a result of this solicitation.

## SECTION 9. INFORMATION ON CONTRACT TO BE AWARDED.

The **Sample Contract** marked as Attachment A to RFP #2023-045 contains terms and conditions that the County plans to include in any contract that may be awarded, but such terms and conditions may be changed, added to, deleted, or modified as may be agreed to between the County and the Offeror during negotiations. However, if an Offeror has any objections to any of the terms or conditions set forth in the Sample Contract or any changes or additions thereto that the Offeror wants to discuss during negotiations, the Offeror should set forth such objections, changes, or additions in such Offeror's proposal submitted in response to this RFP. Otherwise, submission of a proposal by an Offeror will obligate such Offeror, if it is the successful Offeror, to enter into a contract containing the same or substantially similar terms and conditions as contained in such Sample Contract. Other terms and conditions, if necessary, will be negotiated with the successful Offeror.

**END**

**ATTACHMENT A: SAMPLE CONTRACT ONLY**

**COUNTY OF ROANOKE, VIRGINIA  
CONTRACT FOR ON SITE WELLNESS CLINIC**

This Contract, made at Roanoke, Virginia, on \_\_\_\_\_, 20\_\_\_\_, by and between the County of Roanoke, Virginia (hereinafter referred to as the "County" or "Owner"), and \_\_\_\_\_ (hereinafter referred to as "Vendor").

**WITNESSETH:**

NOW THEREFORE, for and in consideration of the benefits which will accrue to the parties hereto by virtue of this Contract and the Respective Covenants contained herein, IT IS MUTUALLY COVENANTED AND AGREED AS FOLLOWS:

**SECTION 1. PROJECT.**

The term Project as used in this Contract refers to the following:

- General Project Description (Specifications)
- Special Features (Add Ons)

**SECTION 2. SERVICES.**

Vendor shall provide the following professional services:

A. **SCOPE OF SERVICES.**

The Vendor shall commence, carry on, and complete the Specifications with all dispatch in a sound, economical, and efficient manner, in accordance with the provisions hereof and all applicable laws. In accomplishing the Specifications, the Vendor shall take reasonable professional efforts to ensure that the work involved is properly coordinated with any related work being carried on by the County or by other County employees, consultants, representatives, or attorneys.

**[Insert Detailed Scope of Services for the Project here or as Exhibit 1. Scope may need to be negotiated with selected offeror]**

### **SECTION 3. SPECIAL CONDITIONS.**

TBT

#### **INSURANCE REQUIREMENTS**

1. **Commercial General Liability.** Commercial General Liability insurance shall insure against all claims, loss, cost, damage, expense or liability from loss of life or damage or injury to persons or property arising out of the Consultant's performance under this Contract. The minimum limits of liability for this coverage shall be \$2,000,000 combined single limit for any one occurrence/\$4,000,000 Annual Aggregate.
2. **Contractual Liability.** Broad form Contractual Liability insurance shall include the indemnification obligation set forth in this Contract.
3. **Workers' Compensation.** Workers' Compensation insurance covering Consultant's statutory obligation under the laws of the Commonwealth of Virginia and Employer's Liability insurance shall be maintained for all its employees engaged in work under this Contract. Minimum limits of liability for Employer's Liability shall be \$100,000 bodily injury by accident each occurrence; \$500,000 bodily injury by disease (policy limit); and \$100,000 bodily injury by disease (each employee). With respect to Workers' Compensation coverage, the Consultant's insurance company shall waive rights of subrogation against the County, its officers, employees, agents, volunteers and representatives.
4. **Automobile Liability.** The minimum limit of liability for Automobile Liability Insurance shall be \$1,000,000 per Occ/\$2,000,000 Annual Aggregate combined single limit applicable to owned or non-owned vehicles used in the performance of any work under this Contract.
5. **Professional Liability/.** Minimum limits of insurance coverage for Professional Liability shall be \$2,000,000 per Occurrence/\$4,000,000 Annual Aggregate. Health Care Practitioners requirements shall follow limits as required by Code of Virginia § 8.01-581.15
6. **Umbrella Coverage.** The insurance coverages and amounts set forth in subsections (1), (2), (3), and (4) of this Section may be met by an umbrella liability policy following the form of the underlying primary coverage. Should an umbrella liability insurance coverage policy be used, such coverage shall be accompanied by a certificate of endorsement stating that it applies to the specific policy numbers indicated for the insurance providing the coverages required by subsections (1), (2), (3), and (4), and it is further agreed that such statement shall be made a part of the certificate of insurance furnished by the Consultant to the County.
7. **Evidence of Insurance.** All insurance, with the exception of Professional Liability Insurance, shall be written on an occurrence basis. Professional Liability Insurance may be written on a claims-made basis. In addition, the following requirements shall be met:

- a) Consultant shall furnish the County a certificate or certificates of insurance showing the type, amount, effective dates and date of expiration of the policies. Certificates of insurance shall include any insurance deductibles.
- b) The Consultant shall notify the County in writing within five (5) calendar days if any of the insurance coverages or policies are cancelled or materially altered and Consultant shall immediately replace such policies and provide documentation of such to the County.
- c) The required insurance policies and coverages, excluding those for Workers Compensation and Professional Liability, shall name the County of Roanoke, its officers, agents, volunteers and employees as additional insureds, and the certificate of insurance shall show if the policies provide such coverage. Where waiver of subrogation is required with respect to any policy of insurance required under this Section, such waiver shall be specified on the certificate of insurance. Additional insured and waiver endorsements shall be received by Roanoke County from the insurer within 30 days of the beginning of this contract. The County's may approve other documentation of such insurance coverages.
- d) Insurance coverage shall be in a form and with an insurance company approved by the County which approval shall not be unreasonably withheld. Any insurance company providing coverage under this Contract shall be authorized to do business in the Commonwealth of Virginia.

J. The Consultant agrees to and shall indemnify and hold harmless Owner and its officers, agents, volunteers, and employees against any and all liability, losses, damages, claims, causes of action, suits of any nature, cost, and expenses, including reasonable attorney's fees, resulting from or arising out of Consultant's or agent's, subcontractor's and/or sub consultant's negligent activities or omissions on or near any of the Owner's property or easements involved in this Project or arising out of or resulting from Consultant's negligence in providing any of the services under this Contract, including, without limitation, fines and penalties, violations of federal, state, or local laws, or regulations promulgated thereunder, or any personal injury, wrongful death, or property damage claims of any type.

K. While on Owner's property and in its performance of this Contract, Consultant or its agents, subcontractor's and/or sub consultant's shall not transport, dispose of, or release any hazardous substance, material, or waste, except as necessary in performance of its work under this Contract and Consultant shall comply with all federal, state, and local laws, rules, regulations, and ordinances controlling air, water, noise, solid wastes, and other pollution, and relating to the storage, transport, release, or disposal of hazardous materials, substances, or waste. Regardless of Owner's acquiescence, Consultant agrees to and shall indemnify and hold Owner, its officers, agents, volunteers, and employees harmless from all costs, damages, liabilities, fines, or penalties, including attorney's fees, resulting from violation of this paragraph and agrees to reimburse Owner for all costs and expenses incurred by Owner in eliminating or remedying such violations. Consultant also agrees to reimburse Owner and hold Owner, its officers, agents, volunteers, and employees harmless from any and all costs, damages, expenses, attorney's fees and all penalties or civil judgments obtained against any of them as a result of Consultant's or its agents, subcontractors and/or sub consultants use or release of any

hazardous material, substance, or waste onto the ground or otherwise, or into the water or air from or upon or near Owner's property or easements.

L. The provisions, requirements, and prohibitions as contained in Sections 2.2 - 4367 through 2.2 - 4377 of the Virginia Code (Ethics in Public Contracting), pertaining to bidders, offerors, contractors, and subcontractors are applicable to this Project.

## **SECTION 6. SPECIAL PROVISIONS.**

- A. If any of the services furnished under this Contract by the Consultant are furnished by obtaining such services outside the Consultant's organization, the Consultant shall provide an executed contract between the person(s) or firm and the Consultant and shall outline the services to be performed and the charges for the same. Such contracts shall be subject to approval by the Owner. Two copies of the executed contract shall be submitted to the Owner for approval prior to the services being performed. Approval shall not be unreasonably withheld. The Consultant shall be solely responsible for all costs and expenses in connection with any such contracts.
- B. The Owner shall make available to the Consultant all reasonable technical data that is in the Owner's possession, including maps, surveys, property descriptions, borings, and other information requested by the Consultant and relating to its work. The Owner and the Consultant agree that the Owner may decide in its sole discretion the reasonableness of any information requested by the Consultant. The Owner shall designate, in writing to the Consultant, the name of the Owner's Project manager for the Project.
- C. The Consultant shall review for locations of archeological sites within the County of Roanoke and shall notify the Owner of any potential conflicts between the proposed Project and such sites.
- D. The Owner shall pay for the following: (1) publishing costs for advertisements of notices, public hearings, requests for bids, and other similar items; (2) for all permits and licenses that may be required by local, state, or federal authorities; and (3) for the necessary land, easements, and rights-of-way required for the Project.
- E. The Owner by seven days written notice may terminate this Contract, with or without cause, in whole or in part at any time. Upon receipt of such notice, the Consultant shall immediately discontinue all services affected (unless the notice directs otherwise), and deliver to the Owner all data, drawings, specifications, reports, estimates, summaries, and such other information and materials as may have been accumulated by the Consultant in performing this Contract whether completed or in process.
  - 1. If the termination is due to the failure of the Consultant to fulfill any of its Contract obligations, the Owner may take over the work and prosecute the same to completion by Contract or otherwise. In such case, the Consultant shall be liable to the Owner for any damages allowed by law, and upon demand of Owner shall promptly pay the same to Owner.
  - 2. Should the Contract be terminated not due in any way to the fault of the Consultant, the Consultant shall only be entitled to compensation for services actually performed prior to notice of termination and approved by the Owner and any

applicable federal or state approving agency. No profit, overhead, or any other costs of any type are allowed after the date of such notice of termination.

3. The rights and remedies of the Owner provided in this Section are in addition to any other rights and remedies provided by law or under this Contract and Owner may pursue any and all such rights and remedies against Consultant as it deems appropriate.
- F. If the documents called for by the Contract are completed in accordance with criteria and/or decisions made by the Owner and such documents are substantially changed or revised, for any reason other than the fault of the Consultant in preparing same, then the Consultant shall be entitled to compensation as mutually agreed upon between the Owner and Consultant for rendering the services necessary to complete the changes. The amount of this fee shall be negotiated between the parties. The fee for the changes shall be due and payable when the revisions are approved by the Owner. If agreement cannot be reached between the parties for rendering such services, then the Owner can terminate the Contract without any liability of any type for any damages or compensation to the Consultant, and the Owner will owe nothing further to the Consultant. However, if such changes or revisions are due in any way to the fault of the Consultant, the Owner can require the Consultant to perform the services required under this Contract and make such changes and revisions without any additional charges by the Consultant and pursue such other remedies available to the Owner under this Contract or by law, or any combination of such remedies as the Owner deems appropriate.
- G. By virtue of entering into this Contract the Consultant submits itself to a court of competent jurisdiction in the County of Roanoke, Virginia, and further agrees that this Contract is controlled by the laws of the Commonwealth of Virginia and that all claims, disputes, and other matters shall only be decided by such a court according to the laws of the Commonwealth of Virginia.
- H. Consultant agrees that no payment, final or otherwise, nor partial or entire use, occupancy, or acceptance of the Project by the Owner shall be an acceptance of any professional services not in accordance with the Contract, nor shall the same relieve the Consultant of any responsibility for any errors or omissions in connection with the Project or operate to release the Consultant from any obligation under the Contract.
- I. The Consultant shall be fully responsible to the Owner for all acts and omissions of all succeeding tiers of subcontractors, agents, and sub consultants performing or furnishing any of the work just as the Consultant is responsible for its own acts and omissions.
- J. During the performance of this Contract, the Consultant agrees as follows:
  1. The Consultant will not discriminate against any subcontractor, employee, or applicant for employment because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by State law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the Consultant. The Consultant agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.

2. The Consultant, in all solicitations or advertisements for employees placed by or on behalf of the Consultant, will state that such Consultant is an equal employment opportunity employer.
3. Notices, advertisements, and solicitations placed in accordance with federal law, rule, or regulation shall be deemed sufficient for the purpose of meeting the requirements of this section.
4. The Consultant will include the provisions of the foregoing Subsections (1, 2, and 3) in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

K. Consultant agrees that the County's waiver or failure to enforce or require performance of any term or condition of this Contract or the County's waiver of any particular breach of this Contract by the Consultant extends to that instance only. Such waiver or failure is not and shall not be a waiver of any of the terms or conditions of this Contract or a waiver of any other breaches of the Contract by the Consultant and does not bar the County from requiring the Consultant to comply with all the terms and conditions of the Contract and does not bar the County from asserting any and all rights and/or remedies it has or might have against the Consultant under this Contract or by law.

L. If any provision of this Contract, or the application of any provision hereof to a particular entity or circumstance, shall be held to be invalid or unenforceable by a court of competent jurisdiction, the remaining provisions of the Contract shall not be affected and all other terms and conditions of the Contract shall be valid and enforceable to the fullest extent permitted by law.

M. (1) During the performance of this Contract, the Consultant agrees to (i) provide a drug-free workplace for the Consultant's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the Consultant's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the Consultant that the Consultant maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

(2) For the purpose of this section, "drug-free workplace" means a site for the performance of work done in connection with a specific contract awarded to a Contractor, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the Contract.

N. Pursuant to Virginia Code Section 2.2 - 4343.1, be advised that the County of Roanoke does not discriminate against faith-based organizations.

O. The Consultant agrees that Consultant will comply with the requirements of Section 2.2-4354 of the Va. Code regarding Consultant's payment to other entities and that Consultant will take one of the two actions permitted therein within seven (7) days after receipt of amounts paid to Consultant by the County. The Consultant agrees that Consultant shall indemnify and hold the County harmless for any lawful claims resulting from failure of the

Consultant to make prompt payments to all persons supplying him equipment, labor, tools, or material in prosecution and completion of the Work provided for in the Contract. In the event of such claims, the County may, after providing written notice to the Consultant, withhold from any progress and/or final payment the unpaid sum of money deemed sufficient to pay all lawful claims and associated costs in connection with the Contract.

P. **Data on Convictions for Certain Crimes and Child Abuse and Neglect Certification of Contractor:** The Consultant certifies that none of the persons who will provide services requiring direct contact with students on school property during school hours or during school-sponsored activities has been convicted of any of the following felony or misdemeanor offenses: felony sex or violence offenses, other felony offenses or misdemeanor sex offenses within the past ten years.

The Consultant further understands and acknowledges (1) that if he makes a materially false statement regarding any of the above offenses, he will be guilty of a Class 1 misdemeanor and may forfeit profits derived from the contract. Further, the Consultant understands and acknowledges that before any person is permitted to provide such services subsequent to this certification, he must complete a new certification regarding such person in a form satisfactory to Roanoke County and the Roanoke County School Board. **Data and Convictions information will be requested before the County of Roanoke/Schools enters into a contract / when required.**

Q. Contractual claims, whether for money or for other relief, including any disputes as to change orders or extra work, shall be submitted, in writing, no later than sixty (60) calendar days after final payment or payment designated as a final payment; however, written notice of the Contractor's intention to file such claim must be given at the time of the occurrence or beginning of the work upon which the claim is based. Such notice is a condition precedent to the assertion of any such claim by the Contractor. A written decision upon any such claims will be made by the Board of Supervisors or its designee (hereafter "BOS"). The Contractor may not institute legal action prior to receipt of the County's decision on the claim unless the BOS fails to render such decision within ninety (90) calendar days from submittal of its claim. The decision of the BOS shall be final and conclusive unless the Contractor within six (6) months of the date of the final decision on a claim or from expiration of the 90 day time limit, whichever occurs first, initiates legal action as provided in Section 2.2-4364 of the Code of Virginia. Failure of the County to render a decision within said ninety (90) calendar days shall not result in the Contractor being awarded the relief claimed nor shall it result in any other relief or penalty. The sole result of the County's failure to render a decision within said ninety (90) calendar days shall be Contractor's right to immediately institute legal action. No administrative appeals procedure pursuant to Section 2.2-4365 of the Code of Virginia has been established for contractual claims under this Contract.

R. Consultant shall comply with the provisions of Virginia Code Section 2.2-4311.2, as amended, which provides that a Consultant organized as a stock or nonstock corporation, limited liability company, business trust, or limited partnership or registered as a registered limited liability partnership shall be authorized to transact business in the Commonwealth as a domestic or foreign business entity if so required by Title 13.1 or Title 50 or as otherwise required by law. Consultant shall

not allow its existence to lapse or its certificate of authority or registration to transact business in the Commonwealth, if so required under Title 13.1 or Title 50, to be revoked or cancelled at any time during the term of the Contract. The County may void the Contract if the Consultant fails to remain in compliance with the provisions of this section.

- S. This Contract is or may be subject to funding and/or appropriations from federal, state, and/or local governments and/or agencies and/or from the Board of Supervisors of the County of Roanoke. If any such funding is not provided, withdrawn, or otherwise not made available for the Contract, the Consultant agrees that the County may terminate the Contract on seven (7) days written notice to the Consultant, without any penalty or damages being incurred by the County.
- T. Consultant agrees that all reports and any other documents (including electronic data) prepared for, obtained in connection with, and/or required to be produced in connection with this Contract shall be delivered by the Consultant to the County and all such items shall become the sole property of the County. The Consultant agrees that the County shall own all rights of any type in and to all such items, including but not limited to copyrights and trademarks, and the County may reproduce, copy, and use all such items as the County deems appropriate, without any restriction or limitation on their use and without any cost or charges to the County from the Consultant. Consultant hereby transfers and assigns all such rights and items to the County. Consultant further agrees Consultant will take any action and execute any documents necessary to accomplish the provisions of this Section. The Consultant also warrants that Consultant has good title to all materials, equipment, documents, and supplies which it uses in the Work or for which it accepts payment in whole or in part.
- U. This Contract, including any attachments, exhibits, and referenced documents, constitutes the complete understanding between the parties. This Contract may be amended only by written instrument properly executed by the parties.

**SIGNATURE PAGE TO FOLLOW.**

THIS AGREEMENT may be modified in writing by mutual agreement of both parties.

IN WITNESS WHEREOF, the parties hereto have signed this Contract by their authorized representatives.

Full Legal Name of Consultant

By \_\_\_\_\_

Printed Name and Title

ROANOKE COUNTY BOARD OF SUPERVISORS

By \_\_\_\_\_  
Dawn M. Rago, Senior Buyer

Approved as to execution:

County Attorney/Assistant County Attorney

**CONTRACT 2023-045**  
**BETWEEN COUNTY OF ROANOKE AND VENDOR NAME**  
**FOR ONSITE WELLNESS CLINIC**

**EXHIBIT 1: SCOPE OF WORK/FEE SCHEDULE**

**REFERENCE: RFP# 2023-045**

**The services, work, and/or items that the Contractor shall provide in a timely and proper manner in accordance with the Contract include, but are not necessarily limited to, the following:**

**The final scope of services will be negotiated with the Selected Offeror.**

**ATTACHMENT B: PROPOSAL RESPONSE AND CHECKLIST**

Fully complete the following pages and submit along with Page 2 (Signature Page) of the RFP and all applicable attachments.

**I. General Information**

Offeror's (Legal Business) Name: \_\_\_\_\_

Doing Business As (If Different Name): \_\_\_\_\_

Person to Contact Regarding this RFP (Name): \_\_\_\_\_

Telephone Number: (\_\_\_\_) \_\_\_\_\_

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

Check type of organization:

Corporation \_\_\_\_\_ Partnership \_\_\_\_\_

Sole Proprietor (Individual) \_\_\_\_\_ Other (describe) \_\_\_\_\_

If Sole Proprietor (individually owned), number of years in business: \_\_\_\_\_

Have you ever operated under another name? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes -

Other name: \_\_\_\_\_

Number of years in business under this name: \_\_\_\_\_

State license number under this name: \_\_\_\_\_

## **II. Organization of Firm**

The Offeror should submit as **Attachment 1** at a minimum the length of time in the business, corporate experience, strengths in the industry, business philosophy, and a description of the organizational structure of the firm; a description of the organizational structure for the management and operation of the services requested and/or provision of the items referred to in this RFP, including an organizational chart denoting all positions and the number of personnel in each position.

## **III. Financial Condition of Offeror**

The sufficiency of the financial resources and the ability of the Offeror to comply with the duties and responsibilities described in this RFP.

The Offeror shall submit as **Attachment 2**, a current annual financial report and the previous year's report and a statement regarding any recent or foreseeable mergers or acquisitions. Financial statements may be marked as "confidential" in accordance with the requirements set out in Section 3(G) of this RFP.

## **IV. Experience**

The Offeror shall submit as **Attachment 3**, a narrative of their firm's experience in providing the services and/or items in this RFP, including type of business, business location, and number of years in business.

## **V. References**

Each Offeror should provide as **Attachment 4**, the names, addresses, and telephone numbers of at least three (3) references in connection with supplying the services or items requested in this RFP, especially from other local government operations similar to those being requested in this RFP by the County. Each reference should include organizational name, official address, contact person, title of contact, and phone number.

## **VI. Conditions of Offeror's Proposal**

Offeror shall submit as **Attachment 5**, any conditions to the Offeror's proposal or exceptions to the sample contract (Attachment A to the RFP).

## **VII. Conflict of Interest**

\_\_\_\_ Offeror, owner, officer, employees, agents and immediate family members are not now, and have not been in the past year, an employee of the County of Roanoke or has no responsibility or authority with the County that might affect the procurement transaction or any claim resulting therefrom.

OR

State the complete name and address of each such person and their connection to the County of Roanoke. Each Offeror is advised that the Ethics in Public Contracting and Conflict of Interests Act of the Virginia Code, as set forth in Section 4 (L) of the RFP, apply to this RFP.

Name

Address

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#### **VIII. Convictions and Debarment**

If you answer yes to any of the following, state on **Attachment 6** the person or entity against whom the conviction or debarment was entered, give the location and date of the conviction or debarment, describe the project involved, and explain the circumstances relating to the conviction or debarment, including the names, addresses and phone numbers of persons who might be contacted for additional information.

1. In the last ten years, has your organization or any officer, director, partner, owner, project manager, procurement manager or chief financial officer of your organization:
  - a. ever been found guilty on charges relating to conflicts of interest?  
Yes  No
  
2. a. Is your organization or any officer, director, partner or owner currently debarred or enjoined from doing federal, state or local government work for any reason?  
Yes  No
  
- b. Has your organization or any officer, director, partner or owner ever been debarred or enjoined from doing federal, state or local government work for any reason?  
Yes  No

## **IX. Compliance**

If you answer yes to any of the following, give the date of the termination order, or payment, describe the project involved, and explain the circumstances relating to same, including the names, addresses and phone numbers of persons who might be contacted for additional information.

1. Has your organization:

a. ever been terminated on a contract for cause?

Yes        No       

## **X. Confidential & Proprietary Information**

Identify the section and page number of any information in your proposal that has been identified as confidential, proprietary or a trade secret (see Section 4(A) of the RFP).

Page Number Information	Section	Description of Confidential and/or Proprietary
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Offeror shall provide one redacted copy of its proposal fit for public dissemination, in the event the County must respond to a Freedom of Information Act request. The redacted copy of Offeror's proposal shall be provided on USB Drive or other electronically transferable media and shall be redacted to protect any confidential and/or proprietary information and shall be labeled as such. Offeror shall not mark its entire proposal as confidential and/or redact the entire proposal; doing so may result in the disqualification of Offeror's proposal.

## **Attachments:**

The following items should be included with your RFP response. Place a check mark on the line next to each applicable item submitted with your proposal. Write N/A (not applicable) on the line next to those items that do not apply to your response.

Signature Page (Pg. 2) of RFP \_\_\_\_\_

Direct Contact with Students Form \_\_\_\_\_

Removable Media Containing  
Redacted Version of Proposal \_\_\_\_\_

Attachment B (Proposal Response  
And Checklist) to RFP 2023-045 \_\_\_\_\_

1. Organization of Firm \_\_\_\_\_
2. Financial Reports \_\_\_\_\_
3. Experience \_\_\_\_\_
4. References \_\_\_\_\_
5. Conditions of the Proposal (If Applicable) \_\_\_\_\_
6. Debarment Explanation (If Applicable) \_\_\_\_\_
7. Compliance Explanation (If Applicable) \_\_\_\_\_