



SAN FRANCISCO HEALTH SERVICE SYSTEM

Affordable, Quality Benefits & Well-Being

**Updated in accordance with Addendum No. 1 to the RFP, dated
April 12, 2022**

REQUEST FOR PROPOSALS FOR Printing and Mail Services for Benefits Communications, Open Enrollment and Audits RFPQ#HSS2022.C1

CONTACT: Michael Visconti, michael.visconti@sfgov.org, (628) 652-4645

Background:

The San Francisco Health Service System (SFHSS) executes all process phases related to benefit operations and administration of benefits for approximately 136,000 individuals, including both active and retired employees of the City and County of San Francisco, the San Francisco Unified School District, the Community College of San Francisco, and the San Francisco Superior Court, and their covered dependents (SFHSS Members).

Intent of this Request for Proposals (RFP):

The San Francisco Health Service System seeks proposals from Respondents demonstrating the successful provision of secure print and mail services including secure delivery of HIPAA-protected information for large public-sector clients. It is the intent of SFHSS to identify the most responsible and qualified Respondent and to negotiate a contract for the services described, including support for annual open enrollment communications, medical, dental, vision and voluntary benefits, and support for dependent eligibility verification audit communications.

Anticipated Contract Term: five (5) years*

*three (3) one-year options to extend following the first two (2) year term

Anticipated Budget: \$200,000 annually*

*excluding the cost of postage

Subcontracting/Sub-consulting Requirement:

There is no subcontracting or subconsulting requirement for this agreement due to presence of HIPAA-protected information in open enrollment and benefits communications and audits. However, the City strongly encourages responses from qualified LBEs. Pursuant to Admin Code Chapter 14B rating bonuses will be in effect for any Respondents who are certified as a Small- or Micro-LBE by the Contract Monitoring Division (CMD).

Requirement to be an Approved Supplier:

All respondents to this RFP must certify to become an Approved Supplier within ten (10) days of award or selection by SFHSS. This includes completing a 12B Equal Benefits Declaration. Respondents to this RFP should review the Approved Supplier and 12B process prior to bidding: <https://sfcitypartner.sfgov.org/pages/index.aspx>, as well as the City's prohibition on contracting with vendors headquartered in or providing services from states that allow discrimination against LGBT individuals or states with restrictive abortion laws. <https://sfgsa.org/chapter-12x-state-ban-list>.

Schedule:*

| | |
|-----------------------------------|--------------------------|
| RFP Issued | 3/16/2022 |
| Deadline for RFP Questions | 4/5/2022 (2PM PT) |
| RFP Answers Posted | 4/13 - 4/16/2022 |
| Deadline for Proposals | 5/3/2022 (2PM PT) |
| Notice of Intent to Award | 6/1/2022 |
| Contract Start Date | 7/1/2022 |

*dates subject to change

RFP Questions and Communications:

To ensure fair and equal access to information about this RFP, any and all communications must be directed to **michael.visconti@sfgov.org**. Unauthorized communications may be cause for disqualification and rejection of Proposal(s). Questions must be in writing and received by the Deadline for RFP Questions. No questions will be accepted after this time with the exception of City vendor requirement questions.

1. Introduction

1.1 The San Francisco Health Service System

1.1.1 The San Francisco Health Service System.

The San Francisco Health Service System (SFHSS) is dedicated to preserving and improving sustainable, quality health benefits and to enhancing the well-being of employees, retirees and their families (referred to collectively as “Members” by SFHSS).

SFHSS serves employees and retirees from four participating employer groups, as well as their dependents: the City & County of San Francisco, the San Francisco Unified School District, City College and the San Francisco Superior Court.

1.1.2. SFHSS Member Population.

SFHSS executes all process phases related to benefit operations and administration of non-pension benefits (including health, dental and vision)¹ and manages well-being services and outreach for approximately 47,000 employees, 36,000 retirees and 53,000 dependents (totaling over 136,000 covered Member lives) in accordance with The City and County of San Francisco Charter §§ 12.200-12.203 and A8.420-A8.432, and San Francisco Administrative Code §§ 16.700-16.703.²

1.2 Open Enrollment and Health Benefit Communications

1.2.1. Open Enrollment.

SFHSS is mandated to preserving and improving sustainable, quality health benefits for the employees and retirees of CCSF, USD, CCD, the Courts, and their covered dependents. SFHSS’ year-round work and purpose is reflected and presented to our members during our Open Enrollment (“OE”) period which takes place in October each year. This RFP shall support the publications and materials that both SFHSS and our Members rely upon to learn about their benefits options, changes, rates as well as the materials required for members to enroll, re-enroll or change their benefits elections on behalf of themselves and their dependents.

OE is a critical part of SFHSS’ mandate and business purpose therefore all work and materials performed under this RFP is of the highest importance to SFHSS and its governing Board and involves the production of highly visible materials that contain highly confidential information including personally identifiable and HIPAA-related information and must be executed and delivered in a timely manner following the highest standards of quality control and assurance throughout each phase of

¹ Non-pension benefits are comprised of health, dental and vision benefits, as well as certain additional benefits made available to SFHSS Members. Retirees are classified as either eligible for Medicare (Medicare Retirees) or ineligible (Non-Medicare Retirees).

² <https://sfgov.org/services/sf-municipal-codes>

production to ensure accuracy, compliance and completeness of each series of deliverables. SFHSS' membership includes dozens of unions and worker associations who participate in negotiations with the City and others about benefits rates which may result in time-sensitive changes, edits and modifications before press time requiring working closely with SFHSS on changes, proofing and workflow in order to ensure accuracy and timeliness of publications and mailings. Contractor shall be able to provide flexibility and work closely with SFHSS to provide all reasonable alternatives with scope of RFP to accommodate necessary changes. All work performed under RFP shall require regular daily communications with SFHSS and an expectation of high levels of customer service and attention to detail as required by SFHSS and contemplated by RFP.

1.2.2. SFHSS Well-Being Division.

SFHSS supports all Members with a comprehensive in-house well-being program and dedicated well-being staff (the "Well-Being Division"). Partnerships with our current health plans and health benefit vendors are integral to the success of the Well-Being Division and SFHSS well-being programs. The Well-Being Division has several core functions, including:

- (i) providing an in-house, full-spectrum, Employee Assistance Program (EAP), staffed by City employees who are licensed clinicians,
- (ii) developing employee health and well-being communities and expanding department-level health and well-being buy-in,
- (iii) coordinating retiree health and well-being programs,
- (iv) administering healthy behavior campaigns and challenges, and
- (v) promoting targeted health interventions and activities including diabetes prevention programs, healthy habit programs, flu vaccine clinics, health screenings, seminars, coaching, and group exercise classes.

1.3 Dependent Eligibility Verification Audits

In accordance with current Health Service System Rules, approved by the Health Service System Board on December 9, 2021, Section E ("Member Responsibility To Notify Health Service System, When A Dependent Becomes Ineligible"), the Health Service System may audit dependent eligibility at any time (a "Dependent Eligibility Verification Audit" or DEVA). Although the City does not require Members to periodically submit documentation to substantiate dependent eligibility after it has previously been established, it remains the responsibility of the Member to provide immediate written notification to the Health Service System to cancel coverage for any Dependent who no longer meets the conditions for eligibility. In absence of regular controls to verify Dependent eligibility for existing Dependents, there is an increased possibility that ineligible Dependents may receive benefits which could potentially increase the cost of health care to the City.

SFHSS recognizes this risk exposure and seeks a partner as a result of this RFP to perform the printing, distribution and response tracking of mailed-in responses to annual Dependent Eligibility Verification Audits.

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2. Scope of Work

This scope of work is a guide to the work SFHSS expects to be performed by the selected Contractor. It is not a complete listing of all services that may be required. Selected Contractor will work closely with the SFHSS Open Enrollment Project Manager, the SFHSS Communications Division, and the SFHSS Member Services Division, in addition to SFHSS management. The quantities listed below are representative of prior Open Enrollment and benefit mailings for a single fiscal year (July 1 – June 30). These quantities change annually based on changes to the total Member population (e.g., new hires, separation from employment, retirements) or changes to the desired communications strategy of the San Francisco Health Service System.

2.1 Proposed Appendix A (Scope of Services)

**The numbering below reflects final scope of services, beginning with Section 1.*

1. SFHSS, Members, and Open Enrollment

1.1. The San Francisco Health Service System.

The San Francisco Health Service System (SFHSS) is responsible for preserving and improving sustainable, quality health benefits for the employees and retirees from four participating employer groups, the City and County of San Francisco (CCSF), the San Francisco Unified School District (USD), The San Francisco Community College District (CCD), the Superior Court of California for the County of San Francisco (Courts), as well as their covered dependents (the “SFHSS Member Population”).

1.2. SFHSS Member Population.

The SFHSS Member Population consists of approximately 136,000 individuals. The non-pension benefits for the SFHSS Member Population are comprised of health, dental and vision benefits, as well as certain additional benefits. Active employees are classified by their participating employee group, unless they belong to the Municipal Executives Association (MEA), which for the most part represents management and executive members within the respective participating employer groups. Retirees are classified as either eligible for Medicare (Medicare Retirees) or ineligible (Non-Medicare Retirees).

1.3. Open Enrollment.

For one month each year, the SFHSS Members Population is permitted to make changes to their benefit options, such as health insurance, dental insurance, vision coverage, and certain fringe benefits that are available to them. The Services shall support the publications and print communications SFHSS and the SFHSS Member Population rely on exclusively to learn about those benefit options, changes to benefits, rates for benefits, and any materials required for the SFHSS Member Population to enroll, re-enroll or change benefits elections on behalf of themselves and their dependents. OE is a critical part of SFHSS’ mandate and business purpose therefore all Services are of the highest importance to SFHSS and its governing Health Service System Board (Board) as the Services are highly visible and contain highly confidential

information including personally identifiable and HIPAA³-protected information which must be delivered in a timely manner while adhering to the highest standards of quality control and assurance.

1.4. Collaborative Process and Stakeholders.

In addition to SFHSS staff, SFHSS benefit providers, and the Board, the SFHSS Membership Population includes dozens of unions and worker associations who participate in negotiations with the City and SFHSS about benefits and rates. This may result in time-sensitive changes, edits and modifications to the Services. As such, the Print and Mail Schedule (Section 4) and project management and coordination between Contractor and SFHSS are paramount and require regular daily communications with SFHSS and an expectation of high levels of customer service and attention to detail.

2. **Print and Mail Services**

Contractor will coordinate with SFHSS on the printing and mailing of Deliverables for the SFHSS Member Population, including the processing of and quality control measures for Member-specific confidential and protected data including names, addresses and benefit information (for Members and their dependents) from an SFHSS database in order to facilitate sending open enrollment health benefit communications to Members (OE Mail Merge), the validation and re-validation of Member address information and National Change of Address Process (NCOA), and the review and verification of deliverable layout and design (Design QC).

2.1. **NCOA and Mail Merge**

2.1.1. NCOA. SFHSS will coordinate with Contractor on multiple rounds of NCOA (National Change of Address Process) to determine a final run of good addresses (Clean), address with a change of address on file with post office (Move Updates), and undeliverable or incomplete addresses (Fails). SFHSS will conduct outreach to Fails. NCOA occurs in July and November. For a given plan year, if a third NCOA is requested by SFHSS, it will occur in April.

2.1.2 OE Mail Merge. Contractor will perform a mail merge for each mailing listed below with multiple rounds of quality control and verification, as necessary to ensure accuracy and reduce errors. SFHSS will provide initial files, InDesign templates, fields, and member information. Each deliverable may have a variable quantity of fields depending on the specific member's information and dependent information. SFHSS files will be sent as flat files (format options to be discussed with Contractor) and may contain 36,000 or more records each. Format of fields is critical and may include leading zeros. Separate files for quality control test cases will be sent to Contractor by SFHSS.

2.2. Letter Templates. At the request of SFHSS, Contractor shall provide letter templates and data sets for Open Enrollment Letters (Sec. 3.1) and Confirmation Letters (Sec. 3.3).

2.3. **Design QC**

³ Health Insurance Portability and Accountability Act of 1996, (Pub.L. 104–191, 110 Stat. 1936, enacted August 21, 1996) as amended.

2.3.1. Rounds of Review and Approval. SFHSS will provide Contractor with first round InDesign files for all Print and Mail Deliverables (letters, forms, envelopes, guides, booklets, and merged live data file sets for letters, forms, inserts, *et. al*), as applicable. Contractor will verify the InDesign layout, merged sets of each document/publication using live test data (to be identified and provided by SFHSS), accuracy of dimensions, and specifications, ensuring live data merges are accurate, complete and printing within designated fields, which are variable, and within parameters of design layout, propose and execute any alternative methods or materials, including support and troubleshooting for layout and merged data corrections, and return to SFHSS for final review and approval, as required. SFHSS and Contractor will engage in up to four (4) such rounds of review and approval of each deliverable. Corrections as a result of an error or omission of Contractor shall not count towards aforementioned rounds of review and approval. Contractor shall make every reasonable effort to correct mail merges using SFHSS live test data and final data files to ensure accuracy in the final production and publication of all printed materials and mailings. Contractor shall use GMC Inspire variable print software or equivalent post-data processing to ensure data matches SFHSS templates and artwork allowing SFHSS data to be placed correctly on SFHSS artwork. Fields that should appear are subject to the member classification (*e.g.*, CCSF, CCD, USD, RET) and number of actual dependents in member's data. Artwork containing data fields shall contain the maximum number of fields and rows as required by data files. Contractor shall provide services and software that shall allow for printing adjustments for merged letters such that empty or otherwise blank fields in artwork templates shall not appear in print, nor shall additional rows appear as they may otherwise be included in artwork.

2.3.2. Paper and PDF Proofs. For each round of review, Contractor will provide SFHSS with both a hard copy (paper) proof of each Print and Mail Deliverable as it will appear (size, paper type/weight, design and dimensions, color) as a publication and a PDF proof (sent via email to SFHSS within twenty-four [24] hours) allowing SFHSS to review quality of paper, color rendering, layout in print and how final deliverables will appear (*e.g.* ensuring double-sided pages to not reveal text from previous page). If only a PDF proof is required by SFHSS for any round(s) of review, SFHSS will notify Contractor in writing. Contractor shall provide all hardcopies of paper proofs to SFHSS via priority overnight mail or hand delivery to arrive within twenty-four (24) hours.

Unless otherwise approved in advance by SFHSS in writing, paper must meet the requirements of the San Francisco Environmental Code, Chapter 5 (the "San Francisco Resource Conservation Ordinance"), including Sec. 506 (Purchase and Use of Printing and Writing Paper Products).⁴

Hard copy proofs shall be transmitted to SFHSS via overnight mail or courier for receipt by the next business day. Contractor shall submit invoices for hard copy proofs pursuant to Section 2.4.3 (Shipping) for reimbursement by SFHSS.

⁴ The San Francisco Resource Conservation Ordinance (San Francisco Environmental Code, Chapter 5), is available at [http://library.amlegal.com/nxt/gateway.dll/California/environment/chapter5resourceconservationordinance?f=templates\\$fn=default.htm\\$3.0\\$vid=amlegal:sanfrancisco_ca\\$anc=JD_Chapter5](http://library.amlegal.com/nxt/gateway.dll/California/environment/chapter5resourceconservationordinance?f=templates$fn=default.htm$3.0$vid=amlegal:sanfrancisco_ca$anc=JD_Chapter5).

- 2.3.3.** Contractor Print and Mail Tracking. Contractor will provide internal tracking of deliverables through the use of scanners and two-dimensional barcodes. Contractor must provide SFHSS with the specifications (such as dimensions, location, resolution, etc.) prior to the first round of review, or as requested by SFHSS, for any internal print and/or mail barcode or tracking code on any Print and Mail Deliverable(s). All mailings will use intelligent mail barcodes (IMB) to insure tracking of all first-class mailings and efficient processing by the USPS.
- 2.3.4.** USPS Compliance. Contractor will maintain 100% compliance with the United State Postal Service (USPS) as a detached mailing unit (DMU) for the USPS.
- 2.3.5.** Process Management. Contractor will use an integrated software system to manage Services provided under this Agreement. The system will provide online, real-time processing of applicable Services, including job estimating, scheduling, and invoicing. Contractor will use HIPAA, COBIT⁵, and SOX⁶ compliant processes and controls, as applicable, including line scan cameras, camera/optical scanners and image analysis programs, as well as proprietary systems.

2.4. Mailing and Postage

- 2.4.1.** Mailing. Contractor will be required to stagger the mailing of select deliverable. Staggered mailing may be by quantities as low as 5,000 units or fifty percent of the total quantity of a specific deliverable. Contractor will use pre-sorting, carrier route sorting, other methods to minimize postage at the request of SFHSS, (e.g., merge documents and pre-sort for optimal saturation rates including running data through postal pre-sort mail sortation software allowing for intelligent mail bars (IMB) and allowing for delivery information to be applied to multiple sorts to local carrier level information for optimal sorting before USPS receives it).
- 2.4.2.** Postage Pre-Payment. Contractor will submit a quote to SFHSS prior to each mailing with an estimated postage amount based on pre-sorted USPS first class mail, postage paid and the quantity for a specific mailing or series of staggered mailings using Contractor's indicia. SFHSS will provide Contractor with a check or wire transfer in the amount of the estimated postage in advance. Upon completion of the mailing, Contractor and SFHSS will reconcile the estimate with the actual amount of postage, requiring either a refund by Contractor of the excess amount, or additional payment by SFHSS to Contractor.
- 2.4.3.** Shipping. Contractor will submit a quote to SFHSS prior to each direct shipment of deliverables to SFHSS with estimated shipping cost and recommended method of delivery. SFHSS will provide Contractor with a check or wire transfer in the amount of the estimated shipping cost in advance. Upon delivery, Contractor and SFHSS will reconcile the estimate with the actual cost of shipping, requiring either a refund by Contractor of the excess amount, or additional payment by SFHSS to Contractor.

2.5. Miscellaneous Print and Mail Provisions and Safeguards

⁵ "Control Objectives for Information and Related Technology" available from the Information Systems Audit and Control Association (<https://www.isaca.org>).

⁶ The Sarbanes-Oxley Act of 2002 (Pub.L. 107-204, 116 Stat. 745, enacted July 30, 2002).

- 2.5.1. Spoils. Contractor will submit its spoils process (the process by which Contractor will replace any deliverables damaged in the process of printing, folding or insertion and reprinting those records for insertion by hand or otherwise) for SFHSS review and approval.
- 2.5.2. Site. Services must be performed within the United States. SFHSS may require Contractor to facilitate a site-visit of its facilities used to provide the print and mail deliverables. Contractor will not be responsible for transportation costs.
- 2.5.3. Contractor’s Project Manager. Contractor will designate a single project manager to oversee all deliverables for review and approval by SFHSS. At the request of SFHSS, and upon reasonable notice, SFHSS may request a new project manager. The project manager shall have no less than three (3) years of professional mail house experience overseeing mailings of a similar size, and complexity, and containing sensitive personally identifiable information. The project manager shall be responsible for receiving all communications, materials, requests, and data and shall be responsible for providing prompt service, responses and make themselves available by telephone and email to SFHSS.

The designated Contractor Project Manager will be:

[To be completed upon selection of a Respondent to this RFP]

[full name]
 [title]
 [email]
 [direct phone number]

- 2.5.4. Secure File Receiving and Processing. Contractor will provide, set-up, and oversee the use of a SFTP (Secure File Transfer Protocol) site for all files, NCOA, mail merge files, deliverables and drafts thereof, for all rounds of review, quality control measures, and final delivery. Contractor will use encrypted email attachments, CDs, DVDs, flash drives and/or portable external hard drives, as needed to ensure secure file receiving and processing absent an SFTP site, upon written approval from SFHSS.

2.6. Dependent Eligibility Verification Audit (DEVA)

Prior to Calendar year 2018, SFHSS internally managed Dependent Eligibility Verification Audits (DEVAs). Due to resource constraints for Calendar Year 2018, SFHSS outsourced the DEVA to a third-party to administer DEVA services, with oversight by SFHSS.

Beginning June 1, 2022 for Fiscal Year 2022/2023 (June 2022-July 2023) and for Fiscal Year 2023/2024 (June 2023-July 2024), SFHSS will leverage the Respondent selected as a result of this RFP (Contractor) to support DEVA’s including the mailing of up to ten (10) SFHSS-created letters to be sent out by Contractor over a specified one-hundred and twenty (120) day period, directed toward SFHSS-identified member groups.

SFHSS may conduct one or two DEVA’s each calendar year.

2.6.1. Project Overview. Each DEVA will include the review and verification of SFHSS required documentation by SFHSS which legally establishes the relationships between the subset of SFHSS Members selected for audit (Audit Participants) and their Dependents. Each DEVA ensures that all enrolled Dependents are eligible as per the Health Service System Rules, as approved by the Health Service System Board. *See* Section 1.3, above.

2.6.2. DEVA Letters. SFHSS will create a series of up to **ten (10) DEVA letters** for printing and mailing by Contractor.⁷ Each letter will have a unique distribution list provided by SFHSS. After the initial Notification (Phase 1, *see Section 2.6.2.1 below*), future mailings and their distribution lists will vary depending on the timeliness and responsiveness of member responses to the audit.

2.6.2.1 *Letter Types.*

Phase 1 – Notification (Audit Day 1):

(Letter 1) Subject and Purpose: a simple notification letter to the entire group designated by SFHSS to be audited (SFHSS proposes a sample of three thousand (3,000) total members per DEVA) or “Audit Participants”. [Audit Day 1]

Phase 2 – Reminder, Confirmation and Request for Further Information (Audit Days 30-59):

(Letter 2A) Subject and Purpose: a reminder letter to any Audit Participants who did not respond to Letter 1 within the first thirty (30) days.

(Letter 2B) Subject and Purpose: a verification letter to any Audit Participants (s) who responded to Letter 1 and were verified. This will be sent in three batches, on or about Days 30, 40 and 50.

(Letter 2C) Subject and Purpose: a letter requesting that Audit Participant(s) resubmit their response because it was incomplete or illegible with instruction to contact SFHSS directly for further details about the insufficiency of their initial response. This will be sent in three batches, on or about Days 30, 40 and 50.

Phase 3 – Final Reminder, Verification, and Under Review (Audit Day 60):

⁷ The letters would include (1) a simple notification letter to the entire group, (2A) a reminder letter to any person(s) who did not respond to the notification letter, (2B) a verification letter to any person(s) who responded and were verified, (2C) a request to resubmit for any person(s) who’s response was incomplete or illegible, (3A) final reminder for any person(s) who still have not responded, (3B) a verification letter, similar to 2B, to any person(s) who responded and were verified, (3C) received but under review, (4A) a final determination letter for any person(s) who have still not responded notifying participant that their dependent will be dropped, and (4B) a verification letter, similar to 2B and 3B, to any person(s) who responded and were verified. From a historical perspective, when SFHSS conducted our last DEVA in 2018, only seven percent (7.0%) of audited individuals failed to respond out of our entire active member population.

(Letter 3A) Subject and Purpose: this letter will serve as the final reminder for any Audit Participant(s) who still have not responded to Letter 1 and/or Letter 2A. It will be sent by Contractor on or about Day 60.

(Letter 3B) Subject and Purpose: a verification letter, similar to Letter 2B, for any Audit Participant(s) who responded to the DEVA and were verified by SFHSS. These verification letter will be sent in a single batch on or about Day 60.

(Letter 3C) Subject and Purpose: this letter notifies Audit Participant(s) that SFHSS has received their response but that the response is still under review, and they will receive a subsequent communication from SFHSS notifying them of the status of their response. These notification letters will be sent in a single batch on or about Day 60.

Phase 4 - Audit Conclusion (Day 90):

(Letter 4A) Subject and Purpose: a final notice of termination letter will be sent to any Audit Participant(s) who have failed to respond or respond adequately and notifying them that their dependent will be dropped by SFHSS. These final determination letters will be sent in a single batch on or about Day 90.

(Letter 4B) Subject and Purpose: a verification letter, similar to Letters 2B and 3B, to any Audit Participant(s) who have been verified by SFHSS. This final verification letter will be sent in a single batch on or about Day 90.

Phase 5 – Final Termination (Day 120):

(Letter 5) Subject and Purpose: a final termination notice that will be sent to all audit participants for whom their dependent will be dropped.

2.6.2.2 *Letter Format and Pages and Envelope Format.*

| <u>Letter</u> | <u>Number of Pages</u> |
|--|-------------------------------|
| Notification Letter (Letter 1) | Three (3) pages, double-sided |
| Reminder Letter (Letter 2A) | Two (2) pages, double-sided |
| Verification Letters (Letter 2B, Letter 3B, 4B) | One (1) page, double-sided |
| Request Resubmission Letter (Letter 2C, Letter 3C) | Two (2) pages, double-sided |
| Final Reminder Letter (Letter 3A) | Two (2) pages, double-sided |
| Notice of Termination (Letter 4A) | Two (2) pages, double-sided |
| Final Termination Notice (Letter 5) | Two (2) pages, double-sided |

Each letter will be double-sided, 8.5” x 11” sheets, printed in color using 4/4 water-based ink, color, or equivalent with no bleed.

Letters shall use SFHSS’ letterhead and logo with #60 Pacesetter Recycled Text White or similar paper, that meets the requirements of the Chapter 5 of

the San Francisco Environment Code (Resource Conservation Ordinance⁸), including, but limited to, the requirement of a minimum of 30% post-consumer materials (PCW).

Letters shall be mailed in Standard #10 Window business envelopes (1-1/18" x 4-1/2" window Size, window location 7/8" from left, 2-3/8" from bottom in landscape orientation), that includes the SFHSS logo, banner and return mailing address printed in color using 4/4 water-based ink, color, or equivalent with no bleed.

2.6.3. Collection and Tracking of DEVA Responses. Upon request by SFHSS, and acceptance by Contractor, Contractor will collaborate with SFHSS on an increased role in future DEVAs. This may include some or all of the following. SFHSS and Contractor will work to execute and amendment to this agreement in good faith and modify the scope depending on Contractor's facilities and capabilities, as necessary.

2.6.3.1 *USPS P.O. Box.* Contractor may be asked to set-up a USPS P.O. Box or other method for receipt and tracking of mailed-in DEVA responses from SFHSS Members. While Members are encouraged to upload documentation directly to the City's Salesforce system or fax responses directly to SFHSS (which are immediately digitized and uploaded for review by our Members Services division), if a substantial proportion of Audit Participants choose to mail their responses during the Calendar Year 2022 DEVA, a mail-in solution may be required.

2.6.3.2 *Member Tracking or Barcode Development.* If a substantial proportion of members prefer to mail in their response, SFHSS will work with Contractor to develop a coversheet with a unique barcode or QR code that will allow rapid sorting and collating by Member within the SFHSS Salesforce system. Each unique barcode or QR code will identify the Audit Participant that is tied to that Member's SFHSS I.D., so Audit Participants can exercise the option to mail-in their response and be easily identified in order for their data to merge with the SFHSS Salesforce system.

2.6.3.3 *Digitalization of Verification Documents Mailed to P.O. Box by Audit Participants.* If a substantial proportion of members prefer to mail in their response, SFHSS will work with Contractor on a system for digitizing verification documents mailed by Audit Participants to the P.O. Box and combining multiple files returned by one Audit Participant into a single file in TIFF, PDF, PNG, or JPG-format. In addition, SFHSS will work with Contractor to create an index file of all the responses by Audit Participant.

2.6.3.4 *Reporting.*

Contractor will generate weekly reports or written email notification for SFHSS on mailed letter, including: (i) which letter(s) have been mailed and to how many Audit Participants and on which dates, and (ii) the total number of letters mailed to-date.

⁸ https://codelibrary.amlegal.com/codes/san_francisco/latest/sf_environment/0-0-0-446

2.6.4. NCOA. Prior to the first DEVA mailings Contractor will perform an NCOA (National Change of Address) process to determine a final run of clean addresses, addresses with a change of address on file with post office or move updates, and undeliverable or incomplete addresses, or fails, in advance of the mailing series that shall be provided to SFHSS in advance of the audit.

2.6.5. Proposed DEVA Timeline.

| | |
|----------------------------|---|
| | <u>Pre-DEVA</u> |
| 45-days before DEVA | <i>Contractor will perform NCOA.</i> |
| 45-day before DEVA | <i>SFHSS and Contractor will finalize the DEVA mailing schedule.</i> |
| 45-days before DEVA | <i>SFHSS and Contractor finalize letter format and printing specification including format and placement of Member-specific barcode or tracking tool.</i> |
| 30-days before DEVA | <i>Contractor sets up P.O. Box.</i> |
| 30-days before DEVA | <i>SFHSS will email Audit Participants with notification of the upcoming DEVA</i> |
| | <u>DEVA</u> |
| Day 1 | <i>Audit Start Date</i> |
| Day 1 | <i>Contractor Sends (Letter 1)</i> |
| Day 7 | <i>Contractor Sends out Letter 2C (request to submit additional information)</i> |
| Day 14 | <i>Contractor Sends out additional Letter 2Cs (request to submit additional information)</i> |
| Day 21 | <i>Contractor Sends out additional Letter 2Cs (request to submit additional information)</i> |
| Day 30 | <i>Contractor Sends out any remaining Letter 2Cs, as well as 2A (reminder) and 2B (verification).</i> |
| <u>Day 40</u> | <i><u>Letter 2B (verification – Batch 2 of 3).</u></i> |
| <u>Day 50</u> | <i><u>Letter 2B (verification – Batch 3 of 3).</u></i> |
| Day 60 | <i>Contractor sends Final Reminder Letter 3A, Confirmation Letter 3B, and Received & In-Review Letter 3C.</i> |
| Day 90 | <i>Contractor sends Final Notice of Termination letter (Letter 4A), and any remaining Verification Letters (Letter 4B).</i> |
| Day 120 | <i>Contractor sends Final Termination Notice (Letter 5)</i> |

2.6.6. Point of Contact. Contractor will identify a key point of contact for the DEVA to manage communications and reporting with SFHSS.

The remainder of this page intentionally left blank, the Scope of Work for Open Enrollment Print and Mail deliverables beings on next page

3. Deliverables (Open Enrollment and Health Benefits)

Contractor will perform the printing, mailing and associated processes, including the Services detailed in Section 2 (Print and Mail Services) for the following Deliverables, or a subset thereof, upon request by SFHSS.

3.1. Open Enrollment (OE) Application Form-plus-Letter and Self-Service Letter with Booklet

3.1.1. **Booklets.** At the request of SFHSS, Contractor will deliver an approximately 16 pages, self-cover, color booklet with variable content, one for each of the following subsets of the SFHSS Member population:

- CCSF Self-Service (CCSF shall include Courts and Commissioners),
- SFUSD Self-Service,
- CCD Self-Service,
- Municipal Executives Association (MEA) Self-Service, and
- Retirees and/or Retiree Self-Service⁹,

(collectively, the “Booklet Subsets”).

Booklet Specifications.

Application Form-plus-Letter or Self-Service Instructions Form-plus Letter:

- The Booklet will include a stand-alone two-sided open enrollment letter specific to each SFHSS Member (8”x11”), and either (i) a stand-alone two-sided open enrollment application form (8”x11”) or (ii) a stand-alone two-sided open enrollment Self-Service Instructions Form (8”x11”). The stand-alone two-sided open enrollment letter will include the SFHSS Member’s address for use in conjunction with the Window Envelope.
- The letter (8”x11”, portrait) will be a detailed cover letter informing each SFHSS Member of Open Enrollment (OE) and will include merged member-specific data, including name and address, ID number, plan names, rates, additional benefits and dependent(s) data across up to eighty-five (85) data fields. The exact number of data fields shall depend on the member classification and number of dependents, if any.
- The Open Enrollment Application Form (8”x11”, portrait, color double-sided) shall contain at least 3 fields. All data fields accommodating the variable number of dependents in each member classification shall be provided in SFHSS artwork. SFHSS’ data shall include fields that do not contain any information (e.g., members who have no dependents or less than max. number of dependent fields provided). Contractor shall ensure that empty fields and rows provided in artwork does not appear on merged letters and that

⁹ SFHSS in the process of providing all members Self-Service instructions in lieu of forms. However, it may be determined that Retirees, or a subset of Retirees, may continue to receive forms.

Contractor's QA and software/printing programming shall ensure automatic printing adjustments for each member letter, envelope or form shall not contain any field sets appearing or any unnecessary additional rows or spacing to maintain a professional look and layout on all final merged materials.

- The Self-Service Instructions (8"x11", portrait), will be color double-sided self-service instructions for the SFHSS Member, specific to the subset of the SFHSS Member population. The following is an example of the Self-Service Instructions (stand-alone, see below) for the prior (2021) Plan Year: <https://sfhss.org/resource/city-county-san-francisco-and-superior-court-san-francisco-self-service-instructions>
- For the Open Enrollment Application Form, the back cover will contain a QR code identifying the appropriate Booklet Subset to facilitate electronic sorting by SFHSS upon receipt from the Member. The following is an example of an enrollment form (stand-alone, see below) for the 2019 Plan Year: <https://sfhss.org/sites/default/files/2021-04/2021-CSF-Enrollment-Form-Fillable.pdf>

Booklet:

- Pages: Sixteen (16) pages
- Print size: 11"x17"
- Ink: 4/4 water-based ink, color, full bleed on two (2) pages
- Paper: #60 Offset Book, Smooth¹⁰
- Binding: 8"x11" portrait orientation, Saddle stitch
- Finishing: For insertion into 9"x12" color envelope

Contractor will adhere to the above specifications. Contractor may suggest similar color quality and/or paper quality, weight, brightness and/or percent-recycled-content only upon receiving written approval from SFHSS.

3.1.2. 9"x12" Envelopes. At the request of SFHSS, Contractor will deliver Envelopes for the Booklets. The Envelopes will be uniform for all Booklet Subsets, with color graphic artwork and full-color photography provided on both sides, to be stuffed with the Booklets, *Application Form-plus-Letter* or *Self-Service Instructions Form-plus Letter*, and other Inserts and mailed to SFHSS Members.

- Size: 9"x12" Window Envelope
- Type: Custom Poly Window
- Ink: 4/4 water-based ink, full color, no bleed
- Paper: 60# Domtar Earth Choice Text, FSC Certified¹¹
- Finishing: Flap must open on 12" side, trim to size, custom die cut, score fold, and clue with poly window 3"

¹⁰ All paper must meet the requirements of the San Francisco Resource Conservation Ordinance, including, but limited to, the requirement of a minimum of 30% post-consumer materials (PCW).

¹¹ Ibid.

x 1.5”; window is to be 0.5” from left side and 2.25” from top of envelope in portrait position.

Contractor will adhere to the above specifications. Contractor may suggest similar color quality and/or paper quality, weight, brightness and/or percent-recycled-content only upon receiving written approval from SFHSS.

3.1.3. Quantities of Booklets with 9”x12” Envelopes. Contractor shall deliver one or more of the following projected quantities upon request, as well as an additional printing run, upon request, if necessary. Pricing for the below quantities is contained in Appendix B (Calculation of Charges).

Should Contractor be unable to procure a selected quantity through regular or expedited means due to conditions fully outside of Contractor’s control, Contractor will provide SFHSS in writing, proposed pricing, for review and approval by SFHSS.

| <u>Booklets</u> | <u>Quantity</u> |
|--------------------------------|--|
| CCSF Self-Service | 33,000 +450 (Courts) +260(Commissioners) |
| SFUSD Self-Service | 8,500 |
| CCD Self-Services | 1,600 |
| MEA Self-Service | 1,500 |
| Retiree / Retiree Self-Service | 34,000 |

| <u>Envelope</u> | <u>Quantity</u> |
|-----------------|-----------------|
| 9”x12” | 79,310 |

3.1.4. 6”x9.5” Envelopes. At the request of HSS, Contractor will deliver Envelopes for the Booklets. The Envelopes will be uniform for all Booklet Subsets, with color graphic artwork and full-color photography provided on both sides, to be stuffed with the Booklets, and mailed to HSS Members.

- o Size: 6”x9.5” Window Envelope
- o Type: #3 Style Window (1-1/18” x 4-1/2” Window Size), Window location 7/8” from left, 2-3/8” from Bottom in landscape orientation
- o Ink: 4/4 water-based ink, color, no bleed
- o Paper: 60# Domtar Earth Choice Text, FSC Certified¹²

Contractor will adhere to the above specifications. Contractor may suggest similar color quality and/or paper quality, weight, brightness and/or percent-recycled-content only upon receiving written approval from HSS.

¹² Ibid.

3.1.5. Quantities of Booklets with 6"x9.5" Envelopes. At the request of HSS, Contractor shall deliver one or more of the following projected quantities upon request, as well as an additional printing run, upon request, if necessary. Pricing for the below quantities is contained in Appendix B (Calculation of Charges). Should Contractor be unable to procure a selected quantity through regular or expedited means due to conditions fully outside of Contractor's control, Contractor will provide HSS in writing, proposed pricing, for review and approval by HSS.

| <u>Booklets</u> | <u>Quantity</u> |
|----------------------------------|-----------------|
| <u>CCSF*</u> | <u>12,500</u> |
| <u>CCD*</u> | <u>1,600</u> |
| <u>Retiree*</u> | <u>32,500</u> |
| <u>CCSF Self-Service</u> | <u>20,400</u> |
| <u>SFUSD Self-Service</u> | <u>8,500</u> |
| <u>Courts Self-Service</u> | <u>425</u> |
| <u>MEA Self-Service</u> | <u>1,400</u> |
| <u>Commissioner Self-Service</u> | <u>240</u> |
| <u>Retiree Self-Service</u> | <u>2,500</u> |

*Application

| <u>Envelope</u> | <u>Quantity</u> |
|------------------|-----------------|
| <u>6" x 9.5"</u> | <u>80,065</u> |

o

3.2. Benefits Guides

SFHSS produces detailed full-color benefits guides for the following subsets of the SFHSS Member Population. The guides are also made available online for all SFHSS Members in PDF format. Contractor will mail printed copies of benefit guides to Retiree Members. All other benefit guides will be delivered to SFHSS offices, for retention and distribution by SFHSS, no later than December 29, 2021, unless otherwise approved in advance by SFHSS in writing. Examples of these benefit guides from the 2021 Plan Year are as follows:

Retirees: https://sfhss.org/sites/default/files/2020-12/2021_RET_Guide.pdf
CCSF: https://sfhss.org/sites/default/files/2021-02/CSF_Guide.pdf
SFUSD: https://sfhss.org/sites/default/files/2021-03/2021_USD_Guide_2.pdf
CCD: https://sfhss.org/sites/default/files/2020-12/2021_CCD_Guide_web_version.pdf

3.2.1. Retiree Benefit Guide. Medicare-eligible Retirees, Retirees not eligible for Medicare, or those approaching Medicare eligibility, as determined by SFHSS, may obtain a Retiree Benefit Guide from SFHSS.

Retiree Benefit Guide Specifications:

- Pages: 36-40 pages plus cover (all double-sided)
- Cover: 4/4 water-based ink, full color, full bleed all four edges
- Inside Pages: 2/2; PMS 307 plus black; 10-12 pages full bleed on all four sides; all other no bleed; 60# Domtar Earth Choice Text, 30% PCW, FSC Certified¹³
- Binding: one center fold, saddle stitch
- Finished trim size: 8.25"x10.75"

Contractor will adhere to the above specifications. Contractor may suggest similar color quality and/or paper quality, weight, brightness and/or percent-recycled-content only upon receiving written approval from SFHSS.

3.2.1.1 Retiree Application Form-plus-Letter or Self-Service Instructions Form-plus-Letter.

The specifications and layout will be identical the above Application Form-plus-Letter or Self-Service Instructions Form-plus-Letter. The Standalone Form-plus-Letter or Self-Service Instructions Form-plus-Letter will be finished and inserted into a 9"x12" envelope.

The front cover will be a similar letter informing each SFHSS Retiree Member of Open Enrollment (OE) and will include merged Member-specific data including name and address, ID number, member name, plan names, benefits and dependent(s) data across at least thirty (30) fields. The exact number of fields shall depend on the number of dependents per member. Fields accommodating variable dependent numbers shall be provided in SFHSS artwork. The open enrollment application form shall contain at least 3 fields. Fields that do not contain any information (*e.g.*, members who have no dependents or less than max. number of dependents) shall not appear on letters, form or envelopes and Contractor's software/printing programming shall allow for automatic adjustments so that empty field sets, or additional rows, shall not appear on any final merged documents (see Section 3.1.1., Integrated Booklet, above).

For the Application Form-plus-Letter, the double-sided application form for the SFHSS Medicare Retiree Member will contain a QR code identifying the Medicare Retiree Member application to facilitate electronic sorting by SFHSS upon receipt from the Member.

Retiree Application Form-plus-Letter and Self-Service Instructions Form-plus Letter Specifications. See Section 3.1.1. for Form-plus-Letter specifications.

¹³ Or similar, that meets the requirements of the San Francisco Resource Conservation Ordinance, including, but limited to, the requirement of a minimum of 30% post-consumer materials (PCW).

Retiree Application Form-plus-Letter and Self-Service Instructions Form-plus Letter Quantity.

| <u>Benefits Guide with Form + Letter</u> | <u>Quantity*</u> |
|--|------------------|
| Retiree Guides (standalone)* | 800 |

* Retiree Benefits Guides will be delivered to SFHSS directly and the cost of mailing to SFHSS will be billed in accordance with Section 2.4 (Mailing and Postage).

Contractor will adhere to the above specifications.

For the purposes of this RFP, Respondent may suggest similar color quality and/or paper quality, weight, brightness and/or percent-recycled-content that is clearly identified in the proposal.

3.2.2. CCSF Benefits Guide. Contractor will deliver to SFHSS the following:

Specifications:

- Pages: 36-40 pages + cover + back cover (all double-sided)
- Cover: 4/4 water-based ink, color, full bleed all four edges
- Inside Pages: 2/2; PMS 307 plus black; 6-10 pages full bleed on all four sides; all other no bleed; 60# Domtar Earth Choice Text, 30% PCW, FSC Certified¹⁴
- Binding: one center fold, saddle stitch
- Finished trim size: 8.25"x10.75"

Quantity:

Contractor shall deliver one or more of the following projected quantities upon request, as well as an additional printing run, upon request, if necessary. Pricing for the below quantities is contained in Appendix B (Calculation of Charges). Should Contractor be unable to procure a selected quantity through regular or expedited means due to conditions fully outside of Contractor's control, Contractor will provide SFHSS in writing, proposed pricing, for review and approval by SFHSS.

| <u>Benefits Guide</u> | <u>Quantity</u> |
|-----------------------|-----------------|
| CCSF | 500 |

Contractor will adhere to the above specifications. Contractor may suggest similar color quality and/or paper quality, weight, brightness and/or percent-recycled-content only upon receiving written approval from SFHSS.

¹⁴ Or similar, that meets the requirements of the San Francisco Resource Conservation Ordinance, including, but limited to, the requirement of a minimum of 30% post-consumer materials (PCW).

3.2.3. SFUSD Benefits Guide. Contractor will deliver to SFHSS the following:

Specifications:

- Pages: 36-40 pages + cover + back cover (all double-sided)
- Cover: 4/4 water-based ink, color, full bleed all four edges
- Inside Pages: 2/2; PMS 307 plus black; 5-6 pages full bleed on all four sides; all other no bleed; 60# Domtar Earth Choice Text, 30% PCW, FSC Certified¹⁵
- Binding: one center fold, saddle stitch
- Finished trim size: 8.25” x 10.75”

Quantity:

Contractor shall deliver one or more of the following projected quantities upon request, as well as an additional printing run, upon request, if necessary. Pricing for the below quantities is contained in Appendix B (Calculation of Charges). Should Contractor be unable to procure a selected quantity through regular or expedited means due to conditions fully outside of Contractor’s control, Contractor will provide SFHSS in writing, proposed pricing, for review and approval by SFHSS.

| <u>Benefits Guide</u> | <u>Quantity</u> |
|-----------------------|-----------------|
| SFUSD | 200 |

Contractor will adhere to the above specifications. Contractor may suggest similar color quality and/or paper quality, weight, brightness and/or percent-recycled-content only upon receiving written approval from SFHSS.

3.2.4. CCD Benefits Guide. Contractor will deliver to SFHSS the following:

Specifications:

- Pages: 32-36 pages + cover + back cover (all double-sided)
- Cover: 4/4 water-based ink, color, full bleed all four edges
- Inside Pages: 2/2; PMS 307 plus black; 5-6 pages full bleed on all four sides; all other no bleed; 60# Domtar Earth Choice Text, 30% PCW, FSC Certified¹⁶
- Binding: one center fold, saddle stitch
- Finished trim size: 8.25” x 10.75”

Quantity:

Contractor shall deliver one or more of the following projected quantities upon request, as well as an additional printing run, upon request, if necessary. Pricing for the below quantities is contained in Appendix B (Calculation of Charges). Should Contractor be unable to procure a selected quantity through regular or expedited means due to conditions fully outside of Contractor’s control, Contractor will provide SFHSS in writing, proposed pricing, for review and approval by SFHSS.

¹⁵ Or similar, that meets the requirements of the San Francisco Resource Conservation Ordinance, including, but limited to, the requirement of a minimum of 30% post-consumer materials (PCW).

¹⁶ Or similar, that meets the requirements of the San Francisco Resource Conservation Ordinance, including, but limited to, the requirement of a minimum of 30% post-consumer materials (PCW).

| <u>Benefits Guide</u> | <u>Quantity</u> |
|-----------------------|-----------------|
| CCD | 50 |

Contractor will adhere to the above specifications. Contractor may suggest similar color quality and/or paper quality, weight, brightness and/or percent-recycled-content only upon receiving written approval from SFHSS.

3.3. Open Enrollment Confirmation Letter and Envelope

After the close of the SFHSS open enrollment period, Contractor will print and send mail-merged letters to SFHSS Members confirming their benefits for the upcoming plan year, including enrollment selections and changes, if applicable, as well as those of their dependents.

Confirmation Letter Specifications:

- Pages: One page, double sided
- Size: 8.5"x11"
- Ink: 4/4 water-based ink, color, no bleed
- Paper: #60 Pacesetter Recycled Text White¹⁷

Confirmation Letter shall include merged member-specific data, including name and address, ID number, member name, plan names, benefits and dependent(s) data across up to sixty-two (62) fields. The exact number of fields shall be dependent on the specific letter (ex. CSF, CCD, USD, Retirees (with Medicare and Non-Medicare) and the number of dependents per member. Fields accommodating variable dependent numbers shall be provided in SFHSS artwork. Fields that have no information shall include alternative entries such as "Waived" or "Not Enrolled." Fields that do not contain any information (e.g., members who have no dependents or less than max. number of dependents possible) shall not appear on letters and Contractor's software/printing programming shall allow for automatic adjustments so that empty field sets, or additional rows, shall not appear on any final merged documents to maintain a professional look and layout on all final merged materials. Contractor shall provide live data merged letters for SFHSS comment and review and correct as needed (see Section 2.2).

Confirmation Letter Quantity:

Contractor shall deliver one or more of the following projected quantities upon request, as well as an additional printing run, upon request, if necessary. Pricing for the below quantities is contained in Appendix B-3 (Calculation of Charges). Should Contractor be unable to procure a selected quantity through regular or expedited means due to conditions fully outside of Contractor's control, Contractor will provide SFHSS in writing, proposed pricing, for review and approval by SFHSS.

| <u>Letter</u> | <u>Quantity</u> |
|---------------|-----------------|
| Confirmation | 80,000 |

Confirmation Envelope Specifications:

- Size: Standard #10 Window Envelope
- Type: #10 Style Window (1-1/18" x 4-1/2" Window Size),

¹⁷ Or similar, that meets the requirements of the San Francisco Resource Conservation Ordinance, including, but limited to, the requirement of a minimum of 30% post-consumer materials (PCW).

- Window location: 7/8" from left, 2-3/8" from Bottom in landscape orientation
- Ink: 4/4 water-based ink, color, no bleed
- Paper: #60 Pacesetter Recycled Text White¹⁸

Confirmation Envelope Quantity:

Contractor shall deliver one or more of the following projected quantities upon request, as well as an additional printing run, upon request, if necessary. Pricing for the below quantities is contained in Appendix B (Calculation of Charges). Should Contractor be unable to procure a selected quantity through regular or expedited means due to conditions fully outside of Contractor’s control, Contractor will provide SFHSS in writing, proposed pricing, for review and approval by SFHSS.

| <u>Envelope</u> | <u>Quantity</u> |
|-----------------|-----------------|
| Confirmation | 80,000 |

Contractor will adhere to the above specifications. Contractor may suggest similar color quality and/or paper quality, weight, brightness and/or percent-recycled-content only upon receiving written approval from SFHSS.

3.4. Inserts

SFHSS may include single or multipage inserts into selected mailings as needed during open enrollment. As with each deliverable described above, SFHSS will provide Contractor with InDesign files and conduct up to four (4) rounds of review and confirmation with Contractor. Corrections as a result of an error or omission of Contractor shall not count towards aforementioned rounds of review and approval. At the request of SFHSS, Contractor will print and include inserts within the aforementioned mailings, as specified. Inserts will not vary by Member and as such may not require any data merge or modification.

Insert Specifications:

- Pages: One page, double sided
- Size: 8.5"x11" or 11"x17" (folded)
- Ink: 4/4 water-based ink, color, no bleed
- Paper: #60 Domtar Earth Choice Text, 30% PCW, FSC Certified¹⁹
- Finish: Insert may require folding to fit in selected envelope (6"x9" or #10) and so as not to interfere with envelope poly window.

Insert Quantity:

Contractor shall deliver one or more of the following projected quantities upon request, as well as an additional printing run, upon request, if necessary. Pricing for the below quantities is contained in Appendix B-3 (Calculation of Charges). Should Contractor be unable to procure a selected quantity through regular or expedited means due to conditions fully outside of Contractor’s control, Contractor will provide SFHSS in writing, proposed pricing, for review and approval by SFHSS.

¹⁸ Or similar, that meets the requirements of the San Francisco Resource Conservation Ordinance, including, but limited to, the requirement of a minimum of 30% post-consumer materials (PCW).

¹⁹ Or similar, that meets the requirements of the San Francisco Resource Conservation Ordinance, including, but limited to, the requirement of a minimum of 30% post-consumer materials (PCW).

| <u>Insert</u> | <u>Quantity</u> |
|---------------------------|-----------------|
| Flu Shot | 34,000 |
| Legal Notice Insert #1 | 80,000 |
| Legal Notice Insert #2 | 80,000 |
| Miscellaneous (if needed) | 80,000 |
| KPMR (11x17) | 650 |

3.5. Self-service e-Benefits On-Boarding Letters and Envelope

SFHSS may require Contractor to include two (2) separate mailings, each single page, double-sided mail-merged letters to specified SFHSS Members regarding the option to enroll in benefits electronically. This letter may replace or accompany one or more of the following: Booklets (Sec. 3.1.1) and/or the Stand-alone Retiree Application Form-plus-Letter or Self-Service Instructions Form-plus-Letter (Sec. 3.2.1.1.), as determined by SFHSS. The letters will be mailed in batches and will be sent in sequence. Letter #1 (double-sided color mail-merged) shall be mailed in small batches based on dates set by SFHSS over the course of two to six weeks followed by Letter #2 (double-sided mail merged) within 2-3 business days to the same addressees. Letter #1 shall serve notify/instruct members of eBenefits and Letter #2 shall include a time-sensitive password and information corresponding to Letter #2. Specific batches and sequencing shall be provided by SFHSS in advance.

As with each deliverable described above, SFHSS will provide Contractor with InDesign files and conduct up to four (4) rounds of review and confirmation with Contractor. Corrections as a result of an error or omission of Contractor shall not count towards aforementioned rounds of review and approval. Contractor shall provide merged live data letters for each letter to SFHSS for review and corrections (see Section 2.2 re mail merge).

At the request of SFHSS, Contractor will print and include inserts within the aforementioned mailings, as specified.

Self-service e-Benefits On-Boarding Letters Specifications:

- Pages: One (1) page, double-sided
- Size: 8.5"x11"
- Ink: 4/4 water-based ink, color, no bleed
- Paper: #60 Domtar Earth Choice Text, 30% PCW, FSC Certified²⁰
- Finish: Insert may require folding to fit in selected envelope (6"x9" or #10) and so as not to interfere with envelope poly window.

Self-service e-Benefits On-Boarding Letters shall include merged member-specific data, including name and address, ID number, member name, and password information data across up to 10 fields. The exact number of fields shall be dependent on the specific letter Fields accommodating variable dependent numbers shall be provided in SFHSS artwork. Fields that have no information shall include alternative entries such as "Waiver" or "Not Enrolled." Fields that do not contain any information (e.g., members who have no dependents or less than max. number of dependents possible) shall not appear on letters and Contractor's software/printing programming shall allow for automatic adjustments

²⁰ Or similar, that meets the requirements of the San Francisco Resource Conservation Ordinance, including, but limited to, the requirement of a minimum of 30% post-consumer materials (PCW).

so that empty field sets, or additional rows, shall not appear on any final merged documents to maintain a professional look and layout on all final merged materials.

Self-service e-Benefits Letter Quantity:

Contractor will provide pricing and be prepared to deliver one or more of the following projected quantities:

| <u>Letter</u> | <u>Quantity</u> |
|----------------------|-----------------|
| e-Benefits Letter #1 | 1,600 |
| e-Benefits Letter #2 | 1,600 |

e-Benefits Envelopes Specifications:

- Size: Standard #10 Window Envelope
- Type: #10 Style Window (1-1/18" x 4-1/2" Window Size),
- Window location: 7/8" from left, 2-3/8" from Bottom in landscape orientation
- Ink: 4/4 water-based ink, color, no bleed
- Paper: #60 Pacesetter Recycled Text White²¹

e-Benefits Envelope Quantity:

Contractor shall deliver one or more of the following projected quantities upon request, as well as an additional printing run, upon request, if necessary. Pricing for the below quantities is contained in Appendix B (Calculation of Charges). Should Contractor be unable to procure a selected quantity through regular or expedited means due to conditions fully outside of Contractor’s control, Contractor will provide SFHSS in writing, proposed pricing, for review and approval by SFHSS

| <u>Envelope</u> | <u>Quantity</u> |
|-----------------------|-----------------|
| eBenefits Envelope #1 | 1,600 |
| eBenefits Envelope #2 | 1,600 |

Contractor will adhere to the above specifications. Contractor may suggest similar color quality and/or paper quality, weight, brightness and/or percent-recycled-content only upon receiving written approval from SFHSS.

3.6. Letter and Envelope, Postcard and/or Booklet

At the request of SFHSS, Contractor will include a letter or postcard to specified SFHSS Members regarding the SFHSS Well-being Division, Open Enrollment events and other resources available to them or require Contractor to print and deliver to SFHSS a Booklet prior to Open Enrollment, for distribution to SFHSS Members or a subset thereof.

As with each deliverable described above, SFHSS will provide Contractor with InDesign files and conduct up to three (3) rounds of review and confirmation with Contractor.

²¹ Or similar, that meets the requirements of the San Francisco Resource Conservation Ordinance, including, but limited to, the requirement of a minimum of 30% post-consumer materials (PCW).

Letter Specifications:

- Pages: One page, double sided
- Size: 8.5"x11"
- Ink: 4/4 water-based ink, color, no bleed
- Paper: #60 Domtar Earth Choice Text, 30% PCW, FSC Certified²²
- Finish: Insert may require folding to fit in selected envelope (6"x9.5" or #10) and so as not to interfere with envelope poly window.

Letter Envelope Specifications:

- Size: Standard #10 Window Envelope
- Type: #10 Style Window (1-1/18" x 4-1/2" Window Size),
- Window location: 7/8" from left, 2-3/8" from Bottom in landscape orientation
- Ink: 4/4 water-based ink, color, no bleed
- Paper: #60 Pacesetter Recycled Text White²³

Letter Quantity

Contractor shall deliver one or more of the following projected quantities upon request, as well as an additional printing run, upon request, if necessary. Pricing for the below quantities is contained in Appendix B-3 (Calculation of Charges). Should Contractor be unable to procure a selected quantity through regular or expedited means due to conditions fully outside of Contractor’s control, Contractor will provide SFHSS in writing, proposed pricing, for review and approval by SFHSS.

| <u>Letter</u> | <u>Quantity</u> |
|---------------|-----------------|
| Well-being | 10,000 |

Postcard Version 1 Specifications:

- Pages: Single postcard, color, double sided
- Size: 4"x6.25"
- Ink: 4/4 water-based ink, color, no bleed
- Paper: heavy stock to be determined by SFHSS²⁴
- Closure: Low tack glue dot
- Die Cut: Perforated at Spine
- Finish: Fold + adhesive
- Postage: Pre-Sorted First Class Return postage paid (if requested by SFHSS)

Postcard Version 2 Specifications:

- Pages: Single postcard, color, double sided
- Size: 4.25"x6"
- Ink: 4/4 water-based ink, color, no bleed

²² Or similar, that meets the requirements of the San Francisco Resource Conservation Ordinance, including, but limited to, the requirement of a minimum of 30% post-consumer materials (PCW).

²³ Or similar, that meets the requirements of the San Francisco Resource Conservation Ordinance, including, but limited to, the requirement of a minimum of 30% post-consumer materials (PCW).

²⁴ Or similar, that meets the requirements of the San Francisco Resource Conservation Ordinance, including, but limited to, the requirement of a minimum of 30% post-consumer materials (PCW).

- Paper: Between 0.007 inches thick and 0.016 inches thick²⁵
- Postage: USPS Postcard Rate

The following is an example of a postcard from the PY2021 open enrollment:
<https://sfhss.org/resource/open-enrollment-2020-dental-rates-postcard>

Postcard Quantity

Contractor shall deliver one or more of the following projected quantities upon request, as well as an additional printing run, upon request, if necessary. Pricing for the below quantities is contained in Appendix B (Calculation of Charges). Should Contractor be unable to procure a selected quantity through regular or expedited means due to conditions fully outside of Contractor’s control, Contractor will provide SFHSS in writing, proposed pricing, for review and approval by SFHSS.

| <u>Postcard</u> | <u>Quantity</u> |
|---|-----------------|
| Postcard Version 1 Quantity A | 10,000 |
| Postcard Version 1 Quantity B | 1,000 |
| <u>Postcard Version 1</u> | <u>30,000</u> |
| <u>Postcard Version 2</u> | <u>10,000</u> |
| <u>Postcard Version 2</u> | <u>1,000</u> |
| <u>Postcard Version 2</u> | <u>30,000</u> |

Booklet Specifications:

- Size: 9” x 6”
- Wrap Cover: 9x24 flat, 4cp+ varnish / 4cp; 100# Gloss Cover, score in three (3) locations
- Inside Pages: 12 pages, print 2 sides, 4cp/4cp, 100# Gloss Book
- Closure and Finish: Gather all pages with cover (stand), stitch on 9” edge, drill, 3-tab closures, inkjet, mail to SFHSS.

Well-being Booklet Quantity

Contractor shall deliver one or more of the following projected quantities upon request, as well as an additional printing run, upon request, if necessary. Pricing for the below quantities is contained in Appendix B (Calculation of Charges). Should Contractor be unable to procure a selected quantity through regular or expedited means due to conditions fully outside of Contractor’s control, Contractor will provide SFHSS in writing, proposed pricing, for review and approval by SFHSS.

| <u>Booklet</u> | <u>Quantity A</u> |
|----------------|-------------------|
| Well-being | 2,000 |

3.7. Stand-alone Benefits Letter and Envelope

At the request of SFHSS, Contractor will print and mail a letter to specified SFHSS Members regarding Open Enrollment or SFHSS Benefits.

²⁵ Or similar, that meets the requirements of the San Francisco Resource Conservation Ordinance, including, but limited to, the requirement of a minimum of 30% post-consumer materials (PCW).

As with each deliverable described above, SFHSS will provide Contractor with InDesign files and conduct up to three (3) rounds of review and confirmation with Contractor.

Stand-alone Benefits Letter Specifications:

- Pages: One page, double sided
- Size: 8.5"x11"
- Ink: 4/4 water-based ink, color, no bleed
- Paper: #60 Domtar Earth Choice Text, 30% PCW, FSC Certified²⁶
- Finish: Insert may require folding to fit in selected envelope (6"x9.5" or #10) and so as not to interfere with envelope poly window.

Stand-alone Benefits Letter Envelope Specifications:

- Size: Standard #10 Window Envelope
- Type: #10 Style Window (1-1/18" x 4-1/2" Window Size),
- Window location: 7/8" from left, 2-3/8" from Bottom in landscape orientation
- Ink: 4/4 water-based ink, color, no bleed
- Paper: #60 Pacesetter Recycled Text White²⁷

Stand-alone Benefits Letter Quantity

Contractor shall deliver one or more of the following projected quantities upon request, as well as an additional printing run, upon request, if necessary. Pricing for the below quantities is contained in Appendix B-3 (Calculation of Charges). Should Contractor be unable to procure a selected quantity through regular or expedited means due to conditions fully outside of Contractor’s control, Contractor will provide SFHSS in writing, proposed pricing, for review and approval by SFHSS.

| <u>Letter + Envelope</u> | <u>Quantity A</u> |
|---------------------------------------|-------------------|
| Stand-alone | 10,000 |
| Waived window envelope* | 6,500 |
| Waived Actives + #10 Envelope | 3,200 |
| Waived Retirees + #10 Envelope | 3,000 |
| Stand-alone envelope #10 Window | 10,000 |

*if requested by SFHSS

3.8. Survey and Envelope

At the request of SFHSS, Contractor will print and mail a survey to specified SFHSS Members regarding Open Enrollment or SFHSS Benefits to be mailed back to Contractor. As with each deliverable described above, SFHSS will provide Contractor with InDesign files and conduct up to three (3) rounds of review and confirmation with Contractor.

Survey Specifications:

- Pages: One page, double sided

²⁶ Or similar, that meets the requirements of the San Francisco Resource Conservation Ordinance, including, but limited to, the requirement of a minimum of 30% post-consumer materials (PCW).

²⁷ Or similar, that meets the requirements of the San Francisco Resource Conservation Ordinance, including, but limited to, the requirement of a minimum of 30% post-consumer materials (PCW).

- Size: 8.5"x11"
- Ink: Contractor to Recommend
- Paper: Contractor to Recommend²⁸
- Finish: Contractor to Recommend

Survey Envelope Specifications:

- Size: Standard #10 Window Envelope
- Type: #10 Style Window (1-1/18" x 4-1/2" Window Size),
- Window location: 7/8" from left, 2-3/8" from Bottom in landscape orientation
- Ink: 4/4 water-based ink, color, no bleed
- Paper: #60 Pacesetter Recycled Text White²⁹

Survey Quantity

Contractor shall deliver one or more of the following projected quantities upon request, as well as an additional printing run, upon request, if necessary. Pricing for the below quantities is contained in Appendix B-3 (Calculation of Charges). Should Contractor be unable to procure a selected quantity through regular or expedited means due to conditions fully outside of Contractor's control, Contractor will provide SFHSS in writing, proposed pricing, for review and approval by SFHSS.

| <u>Survey</u> | <u>Quantity</u> |
|--------------------------------------|-----------------|
| Production, Distribution, Collection | 15,000 |
| #10 outgoing envelopes | 15,000 |
| #9 return envelopes | 15,000 |

Print and mail schedule on following page.

²⁸ Or similar, that meets the requirements of the San Francisco Resource Conservation Ordinance, including, but limited to, the requirement of a minimum of 30% post-consumer materials (PCW).

²⁹ Or similar, that meets the requirements of the San Francisco Resource Conservation Ordinance, including, but limited to, the requirement of a minimum of 30% post-consumer materials (PCW).

4. Print and Mail Schedule (Annually for Open Enrollment)

| Task(s) | Timeline:* |
|---|---|
| Paper Requirements Submitted to Contractor by SFHSS | 7/1/20YY |
| Initial Data to Contractor for NCOA/CASS (Sec. 2.1) | 7/27/20YY |
| Template Letters/Forms art to Contractor | 7/30/20YY |
| Test Deck Data to Contractor | 7/30/20YY |
| Submit Open Enrollment Postcard artwork to Contractor | 7/30/20YY |
| Return OE Postcard proof to SFHSS for approval | 8/3/20YY |
| Provide mailing list for OE postcard to Contractor | 8/4/20YY |
| Mail Open Enrollment Postcard | 8/16/20YY |
| Test OE Letter Proofs to SFHSS | 8/6/20YY |
| Proofs Approved | 8/14/20YY |
| Live Data | 9/3/20YY |
| Live Proofs SFHSS | 9/8/20YY |
| Proofs Approval | 9/13/20YY |
| Open Enrollment (OE) Self-Service Letter with Booklet (Sec. 3.1) | 7/30/20YY – 9/30/20YY Artwork to Contractor by 8/3/20YY |
| Benefits Guides (Guides that will be delivered to SFHSS offices must be delivered no later than 12/29/21 (Sec. 3.2) | 11/15/20YY – 12/29/20YY Artwork to Contractor by 11/15/20YY |
| Open Enrollment Confirmation Letter and Envelope (Sec. 3.3) | 9/3/21 – ENVELOPES, 10/15 test data and pseudo letters 11/19/21– LIVE DATA Artwork for Confirmation Letters due 10/29/20YY |
| Inserts (Sec. 3.4) | 8/14/20YY – 9/10/20YY Artwork due 8/14/20YY |
| Envelope Art submitted to Contractor by SFHSS (Sec. 3.1.2.) | Artwork to Contractor by 8/3/20YY |
| Self-service e-Benefits On-Boarding Letters #1 and #2 and corresponding Envelopes** (Sec. 3.5) if applicable | First week to Mid-August 20YY |
| Well-being Letter and Envelope or Postcard if applicable | Mid-August 20YY |
| Open Enrollment Mailing (A) if applicable | Mid-August 20YY |
| Open Enrollment Mailing (B) if applicable | Late August 20YY |
| Open Enrollment Mailing (C) if applicable | Mid-September 20YY (est. 9/24 – 9/27/20YY) |
| Deliverables for SFHSS Distribution | December 29, 20YY |
| Confirmation Mailing (D) | 12/1/20YY |

*to be determined by Contractor and SFHSS based on applicable open enrollment print and mail schedule

**Self-service e-Benefits On-Boarding letters to be divided into two (2) separate distributions

5. City Terms and Conditions

5.1. Services Provided by Attorneys.

Any services to be provided by a law firm or attorney must be reviewed and approved in writing in advance by the City Attorney. No invoices for services provided by law firms or attorneys, including, without limitation, as subcontractors of Contractor, will be paid unless the provider received advance written approval from the City Attorney.

5.2. Department Liaison.

In performing the Services provided for in this Agreement, Contractor's liaison with the San Francisco Health Service System will be SFHSS Communications Director, cc: SFHSS Communications Manager.

5.3. Location of Services.

Services provided for in this Agreement will be performed at or originate with the Contractor facilities located in [Contractor's U.S. location]. No Services will be performed outside of this location without express written authorization from SFHSS.

The remainder of this page intentionally left blank, the Calculation of Charges that aligns with the proposed Scope of Work for both the Print and Mail deliverables and the DEVA beings on next page

Appendix B Calculation of Charges

Contractor shall be paid upon completion of Deliverables, regardless of additional hours expended, travel expenses, or material expenses incurred, to complete and deliver the services indicated in Appendix A. (Scope of Services), and the Deliverables indicated in Appendix B, Table 1 (Deliverables, Quantities and Costs). In no event shall the total costs of services exceed the value indicated in Article 3.3.1 of the Agreement.

Contractor shall submit a quote to SFHSS for approval prior to each mailing with an estimated postage amount based on pre-sorted USPS first class mail, postage paid and the most current estimated quantity. SFHSS will provide Contractor will a check or wire transfer in the amount of the estimated postage in advance. Upon completion of the mailing, Contractor and SFHSS will reconcile the estimated payment with the actual amount of postage and facilitate either a refund by Contractor of the excess payment amount, or an additional payment by SFHSS to Contractor to match the actual aggregate postage payment.

If the City wishes to add content, features, or functionality beyond the scope of the services indicated in Appendix, Contractor will create a Change Order that outlines budget and delivery ramifications of the extra work. Contractor will not incur additional expenditures on behalf of the City without first receiving written consent from the City.

Upon the completion of a Project and the associated Deliverables indicated in Appendix B, Table 1 (Deliverables, Quantities and Costs), to the City's satisfaction through sign-off by the Health Service Systems Communications Director, the Contactor shall invoice the City for the cost of the Deliverable. The sign-off can be obtained from the City by way of e-mail request confirming all deliverables have been completed to the City's satisfaction.

The invoice shall indicate the Project number and name, and the associated Deliverables indicated in Appendix B, Table 1 (Deliverables, Quantities and Costs), along with the completion date and the date which the Deliverable was furnished to the City.

The completed invoice, and the associated back-up indication the hours worked shall be sent to the City at the following address:

Health Service System
Attn: hss.vendor.invoices@sfgov.org
1145 Market Street, Suite 300
San Francisco, CA 94103
cc: Elaine Gee (elaine.m.gee@sfgov.org); Jessica.Shih@sfgov.org; Carol Karimi (Carol.Karimi@sfgov.org); Lily Liang (lily.liang@sfgov.org); Brian Rodriguez (brianj.rodriguez@sfgov.org).

No invoices for Services provided by law firms or attorneys, including, without limitation, as subcontractors of Contractor, will be paid unless the provider received advance written approval from the City Attorney.

Table 1 (Services, Deliverables, Quantities and Costs)

On the following page, for purposes of submitting a response to this RFP, please populate Cost. A MS Word version of the following RFP Proposal Cost Response Framework is available with the RFP at <https://sfhss.org/RFPs>.

RFP Proposal Cost Response Framework
Deliverables, Quantities and Costs

1. Booklets and 9"x12" Envelopes (Sec. 3.1.1. – 3.1.3.)

a. Quantities (not including spoilage):

| | <u>Quantity</u> | <u>Cost</u> |
|--------------------------------|---|-------------|
| CCSF Self-Service | 33,000 + 450 (Courts) + 260 (Commissioners) | \$ |
| SFUSD Self-Service | 8,500 | \$ |
| CCD Self-Service | 1,600 | \$ |
| MEA Self-Service | 1,500 | \$ |
| Retiree / Retiree Self-Service | 34,000 | \$ |
| Envelopes (3 versions 9x12)** | 79,310 | \$ |
| <u>Envelopes (6"x9")**</u> | <u>79,310</u> | <u>\$</u> |

*Application

**SFHSS may choose either 9x12 or 6x9 but not both at 79,310 within the same calendar year.

2. Retiree Benefit Guides (Secs. 3.2.1., Sec. 3.2.1.1, Sec. 3.2.1.2)

a. Quantities (not including spoilage):

| Guide | Quantity | Cost |
|----------------|----------|------|
| Retiree Guides | 800 | \$ |

3. Stand-alone Benefit Guides (Secs. 3.2.2., 3.2.3, 3.2.4)

a. Quantities (not including spoilage):

| Benefits Guide | Quantity | Cost |
|----------------|----------|------|
| CCSF | 500 | \$ |
| SFUSD | 200 | \$ |
| CCD | 50 | \$ |

4. Open Enrollment Confirmation Letter and #10 window Envelope (Sec. 3.3.)

a. Quantities (not including spoilage):

| | Quantity A | Cost |
|-------------------------|------------|------|
| OE Confirmation Letters | 80,000 | \$ |
| Envelopes | 80,000 | \$ |

5. Inserts (Sec. 3.4.)

a. Quantities (not including spoilage):

| Insert | Quantity A | Cost |
|--------------------------------|------------|------|
| Flu Shot | 34,000 | \$ |
| Legal Notice #1 (if needed) | 80,000 | \$ |
| Legal Notice #2 (if needed) | 80,000 | \$ |
| Miscellaneous (if needed) | 80,000 | \$ |
| KPMR 11x17 | 650 | \$ |

6. Self-service e-Benefits On-Boarding Letters and Envelope (Sec. 3.5.)

a. Quantities (not including spoilage):

| Letters / Envelopes | Quantity | Cost |
|---------------------------------|----------|------|
| eBenefits #1 | 1,600 | \$ |
| eBenefits #2 | 1,600 | \$ |
| eBenefits Envelopes (#1 and #2) | 3,200 | \$ |

7. Letter and Envelope, Postcard and Well-being Booklet (Sec. 3.6.)

a. Quantities (not including spoilage):

| Deliverables* | Quantity | Cost |
|--|------------------------|-----------|
| Letter | 10,000 | \$ |
| <u>Postcard Version</u> 1 Postcard A | 10,000 | \$ |
| <u>Postcard Version</u> 1 Postcard B | 1,500 1,000 | \$ |
| <u>Postcard Version 1</u> | <u>30,000</u> | <u>\$</u> |
| <u>Postcard Version 2</u> | <u>10,000</u> | <u>\$</u> |
| <u>Postcard Version 2</u> | <u>1,000</u> | <u>\$</u> |
| <u>Postcard Version 2</u> | <u>30,000</u> | <u>\$</u> |
| Booklet – No Env and No Mail | 2,000 | \$ |
| Envelope #10 Window | 10,000 | \$ |

*if requested by SFHSS

8. Stand-alone Benefits Letter and Envelope (Sec. 3.7.)

a. Quantities (not including spoilage):

| Letters and Envelopes | Quantity | Cost |
|-------------------------|----------|------|
| Stand-Alone letter | 10,000 | \$ |
| Waived window envelope* | 6,500 | \$ |

| | | |
|---------------------------------|--------|----|
| Waived Actives + #10 Envelopes | 3,200 | \$ |
| Waived Retirees + #10 Envelopes | 3,000 | \$ |
| Stand-alone envelope #10 Window | 10,000 | \$ |

*if requested by SFHSS

9. Survey and Envelope (Sec. 3.8.)

a. Quantities (not including spoilage):

| Survey | Quantity | Cost |
|---------------------------------------|----------|------|
| Production, Distribution, Collection* | 15,000 | \$ |
| #10 outgoing envelopes | 15,000 | \$ |
| #9 return envelopes | 15,000 | \$ |

10. Estimated freight: For shipping books, samples and color proofs of the Guides only (Sec. 2.4.8):

| Freight costs | Quantity | Cost |
|---|----------|--------------------|
| Shipping books, samples and color proofs* | TBD | <i>Passthrough</i> |

11. Print and Mail Services (Open Enrollment):

Respondents may include the cost of the services described in Sections 2.1 – 2.5 within the itemized costs for each deliverable above.

Respondent may also propose additional costs for the services described in Section 2.1 – 2.5 as follows:

| <u>Service</u> | <u>Cost</u> | <u>Additional Comments, Costs, Specifications, Requirements of Modifications Proposed by Respondent</u> |
|--|-------------|---|
| NCOA (Sec. 2.1.1.) process for Open Enrollment | \$ | <i>If cost is included in per-unit costs for deliverables, please include \$0 and specify as such here.</i> |

| | | |
|---|---|---|
| OE Mail Merge (Sec. 2.1.2.) | \$ | <i>If cost is included in per-unit costs for deliverables, please include \$0 and specify as such here.</i> |
| Creation of Letter Templates (Sec. 2.2) | \$ | <i>If cost is included in per-unit costs for deliverables, please include \$0 and specify as such here.</i> |
| Design QC (Section 2.3) | \$ | <i>If cost is included in per-unit costs for deliverables, please include \$0 and specify as such here.</i> |
| Mailing and Postage (Section 2.4) | <p><i>All postage will be paid on a pass-through basis.</i></p> <p><i>If additional costs are associated with Mailing and Postage, please include them here.</i></p> <p>\$ _____ + Description: _____</p> | |
| Miscellaneous Print and Mail Provisions and Safeguards (Section 2.5) | \$ | <i>If cost is included in per-unit costs for deliverables, please include \$0 and specify as such here.</i> |
| Any additional costs or fees applicable to the services in sections 1 (SFHSS, Members, and Open Enrollment) through Section 2.5 (Miscellaneous Print and Mail Provisions and Safeguards) of the Proposed Appendix A (Scope of Services), above. | \$ + description | |

12. Dependent Eligibility Verification Audit (Section 2.6. of the Proposed Appendix A (Scope of Services).

For this section, Respondents are to propose the cost for a single DEVA, with three-thousand (3,000) Audit Participants, and the project schedule and distributions described above.

| <u>Service</u> | <u>Cost</u> | <u>Additional Comments, Costs, Specifications, Requirements of Modifications Proposed by Respondent</u> |
|--------------------|-------------|---|
| DEVA (Section 2.6) | \$ | |

If necessary for Respondent's proposal, please assume the following numbers of letters and distributions:

| <u>Letter (including envelope and mailing/distribution)</u> | <u>Count</u> | <u>Cost (including Envelope, see Sec. 2.6.2.2)</u> |
|---|--------------|--|
| Letter 1 – Notification (Day 1, single mailing), three (3) pages, double-sided | 3,000 | \$ |
| Letter 2A – Reminder to Respond (Day 30, single mailing), two (2) pages, double-sided | 1,000 | \$ |

| | | |
|---|-----|----|
| Letter 2B – Verification Letter (Day 30, single mailing), one (1) page, double-sided | 400 | \$ |
| Letter 2C – Request Resubmission (Day 30, single mailing), two (2) pages, double-sided | 300 | \$ |
| Letter 3A – Final Reminder (Day 60, single mailing), two (2) pages, double-sided | 500 | \$ |
| Letter 3B – Verification Letter (Day 60, single mailing), one (1) page, double-sided | 600 | \$ |
| Letter 3C – Request Resubmission (Day 60, single mailing), two (2) pages, double-sided | 250 | \$ |
| Letter 4A – Notice of Termination Letter (Day 90, single mailing) | 200 | \$ |
| Letter 4B – Verification Letter (Day 90, single mailing), one (1) page, double-sided | 100 | \$ |
| Letter 5 – Final Termination Letter (Day 120, single mailing), one (1) page, double-sided | 200 | \$ |

Respondents are required to include any additional costs associated with the DEVA if applicable, otherwise, please leave this section blank:

| <u>Service</u> | <u>Cost</u> | <u>Additional Comments, Costs, Specifications, Requirements of Modifications Proposed by Respondent</u> |
|--|--|--|
| DEVA Letters (Section 2.6.2) | \$ | <i>Any additional costs associated with the DEVA</i> |
| Collection and Tracking of DEVA Responses (2.6.3.) | Respondents are asked but not required to include a description of Respondent’s capabilities and facilities that may support the future collection and tracking of hard-copy DEVA responses, if applicable, and/or alternative solutions to a large proportion of Audit Participants preferring to mail in hard copies of DEVA response documents. | |
| NCOA (DEVA), (Section 2.6.4) | \$ | <i>Cost for a single NCOA, if not included above, or the cost of a second NCOA, if requested by SFHSS.</i> |

If there are any additional costs associated with the Print and Mail deliverables for Open Enrollment or for the Dependent Eligibility Verification Audit (DEVA), Respondents must include them here with a detailed description:

| <u>Service</u> | <u>Cost</u> | <u>Additional Comments, Costs, Specifications, Requirements of Modifications Proposed by Respondent</u> |
|--|-------------|---|
| Any additional costs associated with the Print and Mail Deliverables and Services for Open Enrollment, Scope of Work Sections 2.1-2.5 and further detailed in Section 3. | \$ | |
| Any additional costs associated with the DEVA (Scope of Work Section 2.6) | \$ | |

The remainder of this page intentionally left blank

3. Response Requirements

3.1 Submission of Proposals and Questions

3.1.1. Submission Deadline.

Proposals and all related materials must be received by **2:00 PM PT on Tuesday, May 3, 2022 (Deadline for Proposals)**. Proposals must be delivered via e-mail to the following address:

Michael Visconti
Contracts Administration Manager
michael.visconti@sfgov.org

Late submissions will not be considered.

3.2.2. Respondent Questions and Deadline.

Respondents shall submit any questions regarding this RFP in writing by **2:00 PM PT on Tuesday, April 5, 2022 (Deadline for RFP Questions)**. Questions must be delivered by e-mail to the following address:

Michael Visconti
Contracts Administration Manager
michael.visconti@sfgov.org

Respondents shall provide specific information to enable SFHSS to identify and respond to their questions.

At its discretion, SFHSS may contact an inquiring Respondent to seek clarification regarding any inquiry received.

Any Respondent that fails to report a known or suspected problem with the RFP or fails to seek clarification or correction of the RFP, shall submit a proposal at their own risk.

SFHSS will publish answers to all submitted questions on or about the week of April 13 – 16, 2022 to the SFHSS website <http://sfhss.org> as well as via email to all prospective Respondents that submitted any question(s).

3.2 Proposal Package

Complete but concise Proposals are recommended for ease of review by the Evaluation Panel. Proposals should provide a straightforward, concise description of the Respondent's capabilities to satisfy the requirements of the RFP. Marketing and sales type information should be excluded. All parts, pages, figures, and tables should be numbered and clearly labeled.

3.3 Required Proposal Format

To be eligible for evaluation, Proposals must adhere to the following format:

3.3.1. Section 1: Cover Letter.

Respondent shall identify Respondents name; corporate structure including parent company and subsidiaries, if applicable; home office and branch office(s), if any, and subcontractors or consultants, to be providing services; office locations; as well as the name, address, email and telephone number of a principal contact for information regarding the Proposal.

Please note that in accordance with City Ordinance No. 189-16 (file No. 1604425), SFHSS is banned from contracting with States with anti-LGBT laws. Under Administrative Code Section 12X.5(a) SFHSS and the City are prohibited from contracting with vendors headquartered in or providing services from states that allow discrimination against LGBT individuals or states with restrictive abortion laws. The current state list is available here: <https://sfgsa.org/chapter-12x-anti-lgbt-state-ban-list>.

3.3.2. Section 2: Table of Contents.

Respondent shall list all materials included in the proposal, clearly identifying the relevant sections and page numbers of the Proposal and the corresponding section(s) of this RFP.

3.3.3. Section 3: Executive Summary.

- Respondent shall state its understanding that the Proposal, and all supporting materials, will be used by SFHSS to evaluate whether Respondent may be considered for the Services detailed herein.
- Respondent shall include a statement that its Proposal is a firm and irrevocable offer for sixty (60) days following the date of submission to SFHSS of its Proposal.
- Respondent shall disclose whether any proposed services will be provided by Respondents personnel, including employees and/or consultants, located outside of the United States, and if so, the location and names of such personnel and/or facilities.
- Respondent shall disclose engagements where Respondent, or Respondent's personnel, is/are currently performing services for the City and County of San Francisco or any City Department.
- Respondent shall provide information on the circumstances and status of any non-routine investigation, examination, complaint, disciplinary action or other proceeding commenced by any current client, prior client, state or federal regulatory body, or professional organization over the past three (3) years to which Respondent was a party, either as the principal subject or as an enjoined party, including but not limited to violations of the Health Insurance Portability and Accountability Act of 1996 (HIPAA).

- Respondent shall provide detailed information about Respondent's background, the services it provides, including, but not limited to, its ownership structure, recent acquisitions or mergers, or any known future acquisitions or mergers.
- Respondent shall provide a detailed description of Respondent's overall approach to the services described in Section 2 (Scope of Work) – generally described in this RFP – as well as a timeline and/or calendar of services and key administrative or regulatory dates.

3.3.4. Section 4: Project Manager and Key Staff.

- Respondent shall identify the proposed Project Manager responsible for overseeing the provision of the services and shall identify prospective support staff performing consequential and significant work (Key Staff).
- Respondent shall detail its proposed team structure, including staffing levels, hours of availability, and proposed distribution of work. Please identify if Project Manager or any Key Staff are classified or may be properly classified as independent contractors.
- Respondent shall include location of Project Manager and Key Staff. Background information shall be provided in detail, including total accumulated years of experience, years working with Respondent, education, professional certification and accreditation, and special areas of expertise including design, print and mail services, software, and procedures. Experience listed shall include entities for which services were performed, the type of services performed, the length of engagement, and size and complexity of the projects. Particular emphasis should be placed on previous experience with projects handling sensitive, personally identifiable, financial, confidential, and/or HIPAA-protected information.

3.3.5. Section 5: Approach/Strategy to Services

Using the services described in Section 2 (Scope of Work) and this RFP as a guide, describe Respondents approach to providing print and mail services to SFHSS and what distinguishes Respondent, Respondent's Project Manager, Key Staff, facilities, experience, and/or processes and procedures. Include any warranties and guarantees for any or all Services or materials related to Services.

3.3.7. Section 7: Pricing for Services.

Respondent shall provide a fee schedule and full pricing breakdown for each deliverable and for each optional quantity specified above. If Respondent is proposing alternative specifications, please clearly indicate this in this Section and confirm that the specifications conform to the San Francisco Resource Conservation Ordinance (San Francisco Environment Code, Chapter 5).

- Any incidental costs, fixed costs, or overhead, is excluded from the above per-unit pricing, shall be clearly identified and segregated.
- If the hourly rate for the Project Manager and/or Key Staff is excluded from the above per-unit pricing, clearly identify the estimated hours for each deliverable.

3.3.8. Section 8: Contract Form and Specifications.

Appendix A, above, contains the general form and content of the Scope of Services to the agreement. Appendix B, above, is the general form of the Calculation of Charges for the agreement.

Appendix 1, below, contains the general form and content of the contract SFHSS anticipates using for the agreement with the selected Respondent (Contractor). Appendix 2, below, is the general form and content SFHSS uses for the required Business Associates Agreement (BAA).

- In submitting a Proposal, the Respondent will be deemed to have reviewed each clause in Appendix 1, 2, A and B. Respondent's Proposal shall identify any objection(s) and/or inclusion(s) to the terms and conditions of Appendix 1, 2, A and B, set forth the basis for the objection(s) and/or inclusion(s), and provides substitute language to make the clause(s) acceptable to Respondent or to address an issue Respondent feel is not addressed by Appendix 1, 2, A and B.
- Respondent shall address limitation of liability for services performed by the Respondent through affirmative response that no such limitations of liability will be imposed, or by responding that limitation of liability shall apply and providing proposed contract language.
- Respondent shall provide in its Proposal the amount of insurance coverage carried as defined in Appendix 1, Article 5 (Insurance and Indemnity).

3.4 Proposal Provisions

3.4.1. Disposition of Proposals, Public Disclosure and Confidentiality.

Public Disclosure. Upon opening, all Proposals to this RFP shall become the exclusive property of SFHSS and may be subject to public disclosure pursuant to the San Francisco Sunshine Ordinance (San Francisco Administrative Code §67.24(e)). In accordance with San Francisco Sunshine Ordinance, contracts, contractors' bids, responses to requests for proposals and all other records of communications between the San Francisco Health Service System Board, the officers and employees of the San Francisco Health Service System, members of the Evaluation Panel, and persons or firms seeking contracts, including but not limited to respondents, prospective bidders, and incumbent providers of print and mail services, shall be open to inspection immediately after a contract has been awarded. Nothing in this request for proposals requires the disclosure of the net worth of a private person or organization or other proprietary financial data submitted for qualification for a contract or other benefit until, and unless, that person or organization is awarded the contract or benefit. Information provided which is covered by this paragraph will be made available to the public upon request.

Confidentiality. If a Respondent believes that any portion of its Proposal is exempt from public disclosure under the San Francisco Sunshine Ordinance, such portion may be marked "CONFIDENTIAL". SFHSS and the Board will deny public disclosure of any portions so designated. The submittal of a Proposal with portions marked CONFIDENTIAL shall constitute the Respondent's agreement, in consideration for SFHSS' willingness to receive such response, to reimburse SFHSS for, and to indemnify, defend, and hold harmless SFHSS, the Board, the City and County of San Francisco, its officers, fiduciaries, employees, and agents from and against: (a) any and all claims, damages, losses, liabilities, suits, judgments, fines, penalties, costs and expenses including, without limitation, attorneys' fees, expenses and court costs of any nature whatsoever (collectively, "Claims") arising from or relating to SFHSS' nondisclosure of any such designated portions of a Proposal; and (b) any and all Claims arising from or relating to SFHSS' public disclosure of any such designated portions of a Proposal if disclosure is deemed required by law or by court order.

3.4.2. Conflict of Interest.

SFHSS cautions Respondents that the California Government Code Section 1090 conflict of interest prohibition pertaining to public officials and government employees has been interpreted to prohibit some independent contractors from being financially interested in any contract that they help create. It is the sole responsibility of each Respondent, and their employees/contractors, to determine whether they may have such a conflict of interest exists in regard to this RFP.

Respondent, and staff, will be required to agree to comply fully with and be bound by the applicable provisions of state and local laws related to conflicts of interest, including Section 15.103 of the City's Charter, Article III (Conduct of Government Officials and Employees), Chapter 2 (Conflict of Interest and Other Prohibited Activities) of City's Campaign and Governmental Conduct Code, and Section 87100 et seq. and Section 1090 et seq. of the Government Code of the State of California. Respondent will be required to acknowledge that it is familiar with these laws; certify that it does not know of any facts that constitute a violation of said provisions; and

agree to immediately notify the City if it becomes aware of any such potential conflicts during the term of the Agreement.

Individuals who will perform work for SFHSS on behalf of Respondent might be deemed Contractors under state and local conflict of interest laws. If so, such individuals will be required to submit a Statement of Economic Interests, California Fair Political Practices Commission Form 700, to the City within ten calendar days of the City notifying the successful Respondent that the City has selected Respondent.

3.4.3. Cancelation.

Should Respondent wish to cancel, revise, or rescind its Proposal, a written letter so stating must be received by SFHSS before the Deadline for Proposals.

Should respondent wish to revise a Proposal, the revised Proposal must be received before the Deadline for Proposals.

In no case will a statement of intent to submit a revised Proposal, or commencement of a revision process, extend the Deadline for Proposals for any Respondent.

At any time during the Proposal evaluation process, SFHSS may require a Respondent to provide oral or written clarification regarding its Proposal. Nonetheless, SFHSS reserves the right to make an award without further clarifications of Proposals received.

3.4.4. Validity of Response.

Any Proposal must remain valid for a period of not less than sixty (60) days from the date of submission. This includes pricing, as well as the proposed staffing assignments of the Project Manager and Key Staff.

3.4.6. Expenses.

There is no expressed or implied obligation for SFHSS to reimburse any Respondent for expenses incurred in preparing their Proposals. Such costs, if applicable, should not be included in the Response. SFHSS reserves the right to retain the Response and use any information or ideas contained therein.

3.4.7. Communications.

Respondents will direct all communications, in writing, to:

Michael Visconti
Contracts Administration Manager
San Francisco Health Service System
Email: michael.visconti@sfgov.org

Respondents are precluded from contacting other SFHSS staff, members of the Evaluation Board, and/or other City and County of San Francisco staff regarding the RFP or the Proposals.

3.4.8. Rejection of Proposal.

At its sole discretion, SFHSS reserves the right to reject any Response for reasons including, but not limited to:

- Failure to respond in the format required, both in content and sequence;
- Failure to submit the response by the specified deadline;
- Failure to answer any question in this RFP;
- Failure to meet a qualification or requirement;
- False or misleading statements; and/or
- Any other reason which, in SFHSS' opinion, the response fails to meet the conditions and requirements of this Request for Proposal, including, but not limited to a violation of Section 3.4.3 (Conflict of Interest), Section 3.4.8 (Communications) or Section 3.4.11. (Campaign Reform Ordinance).

3.4.9. No Offer to Contract.

Issuance of this RFP in no way constitutes a commitment by SFHSS, the Board, or the City, to award a contract. SFHSS reserves the right to reject any or all Proposals received. Acceptance of a Proposal neither commits SFHSS to award a contract to any Respondent, even if all requirements stated in this RFP are met, nor limits our right to negotiate in our best interest. SFHSS reserves the right to contract with a vendor for reasons other than lowest price.

3.4.10. Objections to the RFP Terms.

Should a Respondent, including a prospective Respondent, object on any ground to any provision or legal requirement set forth in this RFP, Respondent must, not more than twenty (20) calendar days before the Deadline for Proposals, provide written notice to SFHSS setting forth with specificity the grounds for the objection(s). The failure of a Respondent to object within the time allowed, and in the manner set forth in this paragraph, shall constitute a complete and irrevocable waiver of any such objection(s).

3.4.11. Campaign Reform Ordinance.

Respondents must comply with Section 1.126 of the San Francisco Campaign and Governmental Conduct Code, which states:

No person who contracts with the City and County of San Francisco for the rendition of personal services, for the furnishing of any material, supplies or equipment to the City, or for selling any land or building to the City, whenever such transaction would require approval by a City elective officer, or the board on which that City elective officer serves, shall make any contribution to such an officer, or candidates for such an office, or committee controlled by such officer or candidate at any time between commencement of negotiations and the later of either (1) the termination of negotiations for such contract, or (2) three months have elapsed from the date the contract is approved by the City elective officer or the board on which that City elective officer serves.

If a Respondent is negotiating for a contract that must be approved by an elected local officer or the board on which that officer serves, during the negotiation period Respondent is prohibited from making contributions to:

- The officer's re-election campaign;
- A candidate for that officer's office; and/or
- A committee controlled by the officer or candidate.

The negotiation period begins with the first point of contact, either by telephone, in person, or in writing, when a contractor approaches any City officer or employee about a particular contract, or a City officer or employee initiates communication with a potential contractor about a contract. The negotiation period ends when a contract is awarded or not awarded to the contractor. Examples of initial contacts include: (1) a vendor contacts a City officer or employee to promote himself or herself as a candidate for a contract; and (2) a City officer or employee contacts a contractor to propose that the contractor apply for a contract. Inquiries for information about a particular contract, requests for documents relating to this RFP, and requests to be placed on a mailing list do not constitute negotiations.

Violation of Section 1.126 may result in the following criminal, civil, or administrative penalties:

- *Criminal.* Any person who knowingly or willfully violates Section 1.126 is subject to a fine of up to \$5,000 and a jail term of not more than six months, or both.
- *Civil.* Any person who intentionally or negligently violates Section 1.126 may be held liable in a civil action brought by the civil prosecutor for an amount up to \$5,000.
- *Administrative.* Any person who intentionally or negligently violates Section 1.126 may be held liable in an administrative proceeding before the Ethics Commission held pursuant to the Charter for an amount up to \$5,000 for each violation.

For further information, Respondents should contact the San Francisco Ethics Commission at (415) 581-2300.

3.4.12. Reservations of Rights by the City.

The issuance of this RFP does not constitute an agreement by SFHSS, the Board, or the City to enter into any contract. SFHSS expressly reserves the right at any time to:

- Waive or correct any defect or informality in any response, proposal, or proposal procedure;
- Reject any or all Proposals;
- Reissue a Request for Proposals, Request for Qualifications or similar procurement;

- Prior to submission deadline for proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this RFP, or the requirements for contents or format of the proposals;
- Procure any services specified in this RFP by any other means; or
- Determine that no contract will be pursued.

3.4.13. Local Business Enterprise.

The requirements of the Local Business Enterprise and Non-Discrimination in Contracting Ordinance set forth in Chapter 14B of the San Francisco Administrative Code as it now exists or as it may be amended in the future (collectively the “LBE Ordinance”) shall apply to this RFP. For more information, please go to the Contract Monitoring Division (CMD) webpage at <http://sfgov.org/cmd/>.

The 10% Micro-LBE and Small-LBE rating bonus provisions applies to this project because the anticipated Agreement amount is less than \$10 Million. Micro-LBEs and Small-LBEs that apply for the rating bonus must be certified by the proposal due date. If they are not certified by the bid due date, the rating bonus will not be granted. The 2% SBA-LBE rating bonus provisions applies to this project because the anticipated Agreement amount is less than \$20 Million. However, the 2% rating bonus for SBA-LBEs shall not be applied if it would adversely affect a Micro-LBE or Small-LBE. SBA-LBEs that apply for the rating bonus must be certified by the proposal due date. If they are not certified by the bid due date, the rating bonus will not be granted.

LBE firms must submit Form 2A with their proposal to be considered for the ratings bonus. <http://sfgov.org/cmd/file/371> (pages 10 and 11).

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4. Evaluation Criteria

This section describes the guidelines used for analyzing and evaluating Responses. SFHSS intends to select, a Respondent that provides the best overall qualifications, inclusive of fee considerations. This RFP does not in any way limit SFHSS' right to solicit contracts for similar or identical services if, in the sole and absolute discretion of SFHSS, it determines the responses received are inadequate to satisfy its needs.

4.1 Evaluation Team

City representatives will serve as the Evaluation Team responsible for evaluating Respondents and rating each Proposal.

4.2 Minimum Qualifications

Any Response that does not demonstrate that the Respondent meets these minimum qualifications by the Deadline for Proposals will be considered non-responsive, and will not be evaluated or eligible for award of any subsequent contract(s).

- Respondent has submitted a Proposal for delivering services and deliverables outlined in this RFP, including but not limited to Section 2 (Scope of Work).
- Respondent and Respondent Project Manager must have at least five (5) years of experience with printing services, mailing services and graphic design/InDesign services, of the scope and complexity of the Services described in this RFP. Experience is to include at least three (3) years of providing services to clients of a similar size and member/individual population to SFHSS which has approximately 136,000 Members.
- Respondent must have the capability to obtain NCOA (National Change of Address) certification for the Services.
- Respondent must possess CASS (Coding Accuracy Support System) certification for the Services.
- Respondent must be able to provide a secure facility printing and secure facility mail services for HIPAA-protected information.
- Respondent must agree to meet service level agreements and confidentiality protections necessary to ensure compliance with HIPAA for the communication of protected health information (PHI), personally identifiable information (PII) and employee identification information (EII).
- Respondent must become an Approved City Supplier within ten (10) days post award. Respondents are not required to have an SF City Supplier ID at the time of bid. Find out how to become a SF City Supplier at: <https://sfgov.org/oca/Qualify-Do-Business>.

4.3. Reassignment of Personnel following Award

4.3.1 Consent to Reassign Personnel.

Contractor shall not reassign personnel assigned to the contract during the term of the contract without prior notification to SFHSS and the Board. If Contractor personnel is unable to perform duties due to illness, resignation, or other factors beyond Contractor's control, Contractor shall make every reasonable effort to provide suitable substitute personnel for review and approval by SFHSS (see 4.3.2 Substitute Personnel below).

4.3.2 Substitute Personnel.

Contractor shall coordinate with SFHSS regarding the selection of Substitute Personnel including, but not limited to in-person interviews with proposed Substitute Personnel. Substitute Personnel shall not automatically receive the hourly rate of the individual or position being replaced. SFHSS and Contractor shall negotiate the hourly rate of any substitute personnel into the contract. The hourly rate negotiated shall depend, in part, upon the experience and individual skills of the proposed substitute personnel. The negotiated rate cannot exceed the hourly rate stated in the contract.

4.3.3. Removal of Personnel.

SFHSS reserves the right to request Contractor personnel be removed from performing any services upon written notice to the Contractor including, but not limited to, for actual or perceived conflict(s) of interest. If Contractor personnel is removed, Contractor shall assign Substitute Personnel.

4.4. Other Terms and Conditions

4.4.1. The selection of any Respondent for contract negotiations shall not imply acceptance by SFHSS of all terms of the response, which may be subject to further negotiation and approvals before SFHSS may be legally bound thereby.

4.4.2. Respondents agree to become an approved city vendor within (10) days of award. Vendors can apply without having a SF City Supplier ID (see <https://sfgov.org/oca/Qualify-Do-Business>).

4.4.3. Respondents agree to meet the applicable terms of the City-approved service contract (Appendix A) and the Business Associates Agreement (Appendix B). If a satisfactory contract cannot be negotiated in a reasonable time with the selected Respondent, then the City and HSS, in its sole discretion, may terminate negotiations and begin contract negotiations with any other remaining Respondents, or reissue a subsequent RFP, a Request for Quote, a Request for Qualifications, or a mini-RFP, or it may determine that the project will not be pursued.

4.5. Protest Procedures

4.5.1. Protest of Non-Responsiveness Determination.

Within five (5) working days of SFHSS' issuance of a notice of non-responsiveness, any Respondent that has submitted a Proposal and believes that SFHSS has incorrectly determined that its proposal is non-responsive may submit a written notice of protest. Such notice of protest must be received by SFHSS on or before the fifth working day following SFHSS' issuance of the notice of non-responsiveness. The notice of protest must include a written statement specifying in detail each and every ground asserted for the protest. The protest must be signed by an individual authorized to represent Respondent, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify all facts and evidence that would support and/or justify the protest.

4.5.2. Protest of Contract Award.

Within five (5) working days of approval by the Board contract, any firm that has submitted a responsive proposal and believes that SFHSS has incorrectly selected another Respondent for award may submit a written notice of protest. Such notice of protest must be received by SFHSS on or before the fifth working day after approval by the Board.

The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent Respondent, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify all facts and evidence that would support and/or justify the protest.

4.5.3. Delivery of Protests.

Respondents are responsible for delivery to, and confirm receipt by, SFHSS of any protest by the deadlines specified in Section 4.8 (Protest Procedures). If a protest is mailed, the protesting Respondent bears the risk of non-delivery within the deadlines specified herein. Protests should be transmitted by a means that will objectively establish the date SFHSS received the protest. Protests or notice of protests made orally, e.g., by telephone, will not be considered.

Protests must be delivered by mail to:

Abbie Yant, RN, MA
Executive Director
San Francisco Health Service System
1145 Market Street, 3rd Floor
San Francisco, CA 94103

RFP Appendix 1 – Agreement

**San Francisco Health Service System
1145 Market Street, Fl. 3
San Francisco, California 94103**

**Agreement between the City and County of San Francisco and
[Contractor]**

P-600 Form Agreement available at <https://sfhss.org/RFPs>

RFP Appendix 2 – Business Associates Agreement

HIPAA Requirements-Business Associate Agreement (BAA)

City-required BAA available at <https://sfhss.org/RFPs>