



# SAN FRANCISCO HEALTH SERVICE SYSTEM

Affordable, Quality Benefits & Well-Being

## Request for Proposals for Drupal Development, Support and Maintenance for the San Francisco Health Service System

(RFPQ.HSS2022.E2)

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**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 (City), the San Francisco Unified School District, the Community College of San Francisco, and the San Francisco Superior Court, and their covered dependents (collectively, “Members”). SFHSS uses <http://sfhss.org> to communicate publicly with Members.

**Purpose:** As a result of this RFP, SFHSS will select a vendor to (i) develop new content and functionality for <http://sfhss.org> (the “Website”) including the upgrade from Drupal 9 to Drupal 10 in 2022 and the ability to securely message Members through individual accounts, (ii) ensure the Website meets the City’s Digital Accessibility and Inclusion Standard- by or before November 18, 2023, and (iii) provide ongoing support, maintenance and subject-matter expertise to improve the Website and expand SFHSS’ ability to communicate directly with Members in the future.

**Anticipated Term:** two (2) years, beginning August 2022, with three (3), one (1) year options to extend.

**Anticipated Budget:** **\$509,000** (for the initial two (2) year term of the agreement).

**Pre-Proposal Conference:** Friday, June 3, 2022, 12:00 a.m. (PT) through Microsoft Team and by phone.

**Deadline for Proposals:** Wednesday, July 6, 2022, 12:00 p.m. (PT) via email.

**LBE Participation Requirement:** There is a **20%** Local Business Enterprise (LBE) participation requirement for this agreement. In addition to the LBE participation requirement, there is a requirement for good faith outreach LBE firms. SFHSS 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, states with restrictive abortion laws, or states with restrictive voting laws: <https://sfgsa.org/chapter-12x-state-ban-list>.

**City Terms and Conditions:** Attached to this RFP are Appendix A.1 and A.2 is the required City terms and conditions for a contract resulting from this RFP. Please review the City Terms and Conditions prior to submitting a proposal including, but not limited to, Article 5 (Insurance and Indemnity) and Article 13 (Data and Security), and the requirement that work must be performed within the continental United States.

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## SECTION 1: BACKGROUND INFORMATION ON SFHSS AND SFHSS.ORG

The San Francisco Health Service System (SFHSS) of the City and County of San Francisco (the “City”) is tasked with preserving and improving sustainable, quality health benefits and enhancing the well-being of employees, retirees, and their families.

The benefits available to SFHSS Members include comprehensive health, dental, vision, and life and long-term disability insurance, as well as a diverse array of voluntary benefits (<https://sfhss.org/your-benefit-plans>). The SFHSS Website (<https://sfhss.org/> or the “Website”) is a key vehicle for communicating available benefits to our Members as well as directing them to our benefit providers.

SFHSS supports all Members with a comprehensive in-house well-being program and dedicated well-being staff (our “Well-Being Division”, see <https://sfhss.org/well-being>). 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 wellness programs, (iv) administering healthy behavior campaigns and challenges, (v) promoting targeted health interventions and activities including diabetes prevention programs, healthy weight programs, flu vaccine clinics, health screenings, seminars, coaching, and group exercise classes, and (vi) maintaining a centrally-located Wellness Center available to Members at 1145 Market Street near the San Francisco Civic Center and City Hall. The SFHSS Website is a key vehicle for communicating available wellbeing events and services to our Members.

The SFHSS Website currently operates using Drupal 9. The current form of the Website was developed as a result of a Request for Qualification (RFP) issued on February 15, 2017, for Drupal Design, Development and Hosting (in Drupal 8). The Website was upgraded to Drupal 9 in 2021. An upgrade to Drupal 10 is currently planned for December 2022 (as of May 19, 2022 at <https://www.drupal.org/about/10>).

## SECTION 2: RFP PURPOSE

As a result of this RFP, SFHSS will select a vendor to (i) develop new content and functionality for the Website, (ii) develop a new solution to allow SFHSS to deliver sensitive Member-specific digital communications in a HIPAA-compliant manner, (iii) ensure the Website meets the City’s

Digital Accessibility and Inclusion Standards<sup>1</sup> by or before November 18, 2023, and (iv) provide ongoing support, maintenance and subject-matter expertise to SFHSS for Website improvements, and expand SFHSS' ability to communicate directly and effectively with Members. The vendor selected as a result of this RFP will also (v) ensure Drupal core and contributed module security, (vi) keep Drupal code up-to-date, (vii) develop improved and equitable access to the Website, (viii) improve Website usability, (ix) provide Users with a secure log-in to access User-specific documents, (x) provide SFHSS with a platform for secure communications with Users or subpopulations of Users, (xi) improve Website analytics and performance, (xii) work to upgrade the Website from Drupal 9 to Drupal 10, and (xiii) develop and improve upon SFHSS staff training and provide documentation for future staff training.

### SECTION 3: PROPOSED TERM

The initial term of the agreement resulting from this RFP will be for approximately two (2) years, beginning on or about August 2022 through approximately June 30, 2024, depending on the duration of the procurement and vendor selection process. SFHSS may reserve the option to extend the agreement by up to three (3) additional years in one (1) year increments (through June 30, 2027) for a maximum term of five (5) years for ongoing maintenance services.

### SECTION 4: CURRENT WEBSITE CAPABILITIES AND COMMUNICATIONS WITH MEMBERS

SFHSS executes all process phases related to benefit operations and administration of non-pension benefits (including health, dental and vision) and manages well-being services, communications, and outreach for approximately 47,000 employees, 36,000 retirees and 53,000 dependents (totaling approximately 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.

SFHSS' oversees the annual Open Enrollment (or "OE") period for Members which takes place in October of each year for benefits beginning on January 1st. This includes, but is not limited to, notifying Members of their current benefit elections prior to OE with an Open Enrollment Letter, and then confirming modifications to their elections following OE with a Benefit Confirmation Statement (collectively, "OE Letters"). Each letter is specific to the Member and lists health, dental, vision, eligible voluntary benefits, rates, name, address, ID number, and other personal data in a simple and easy to understand format, along with the benefits for their eligible dependents (*i.e.*, spouse, domestic partner, children).

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<sup>1</sup> As approved on November 18, 2021, available at <https://sf.gov/reports/november-2021/digital-accessibility-and-inclusion-standard> (the "Digital Accessibility Standard").

Currently, OE Letters are printed and mailed to Members using a third-party off-site print-and-mail services provider. This process is detailed in the SFHSS RFP for Printing and Mail Services for Benefits Communications, Open Enrollment and Audits (RFPQ.HSS2022.C1), available at <https://sfhss.org/RFPs>. In addition to the OE Letters, SFHSS communicates with Members year-round through fliers and postcards, during OE through the mailing of benefit booklets, through work emails for well-being activities and challenges, as well as through <https://myemma.com/> email marketing and a monthly electronic SFHSS newsletter.

## SECTION 5: RFP SCHEDULE

The following is a list of key deadlines and dates for the RFP:

Request for Proposal Issued .....Thursday, May 19, 2022  
**Pre-Proposal Conference ..... Friday, June 3, 2022 (12:00 p.m. PT)\***  
 Deadline for RFP Questions .....Friday, June 10, 2022 (12:00 p.m. PT)  
 SFHSS Response to Questions .....May 23 – June 17, 2022 (on a rolling basis)  
**Deadline for Proposals ..... Wednesday, July 6, 2022 (12:00 p.m. PT)**  
 RFP Evaluation Process .....July 11 – August 5, 2022 (estimate)  
 Contract Start Date .....August 2022 (estimate)

## SECTION 6: RFP QUESTIONS AND COMMUNICATIONS

To ensure fair and equal access to information, all questions and communications regarding the RFP must be sent via e-mail to [patrick.chang@sfgov.org](mailto:patrick.chang@sfgov.org), cc: [michael.visconti@sfgov.org](mailto:michael.visconti@sfgov.org). A summary of answers to questions submitted prior to the Deadline for RFP Questions will be posted to <https://sfhss.org/RFPs>. SFHSS may, at its sole discretion, respond to questions submitted after the Deadline for RFP Questions and post those answers to <https://sfhss.org/RFPs> prior to the Deadline for Proposals. Responses to questions will also be emailed directly to prospective RFP respondents that submitted questions via email prior to the Deadline for RFP Questions.

*The remainder of this page intentionally left blank. Information on the City and County of San Francisco Contract Monitoring Division and the Required Local Business Enterprise Subcontracting and Outreach begins on the following page*

## SECTION 7: CONTRACT MONITORING DIVISION, LBE PARTICIPATION REQUIREMENT AND GOOD FAITH OUTREACH REQUIREMENT

### 7.A. CONTRACT MONITORING DIVISION.

The Contract Monitoring Division of the City and County of San Francisco (CMD) implements and enforces the Chapter 12B Equal Benefits Ordinance and the Chapter 14B Local Business Enterprise Ordinance (the “LBE Ordinance”)<sup>2</sup>, available at <https://sfgov.org/cmd/file/580>) and adopted by the Mayor and the Board of Supervisors to protect the public interest in equality throughout the City & County of San Francisco’s governmental contracting process. The purpose of the LBE Ordinance is to assist small businesses when competing for the award of City contracts. When applicable, the LBE Ordinance provides small CMD-certified businesses with subcontracting opportunities, bid discounts, and various other forms of assistance through a series of legislatively defined programs.

### 7.B. LBE PARTICIPATION REQUIREMENT.

CMD is responsible for setting LBE participation requirements for covered contracts and monitoring the solicitation and selection process. The contract resulting from this RFP is a covered contract under Chapter 14B. As such, CMD has set an LBE subcontracting participation requirement of **twenty percent (20%)** for this RFP.

### 7.C. GOOD FAITH OUTREACH REQUIREMENT.

Pursuant to Section 14B.8(D) of the LBE Ordinance, in addition to meeting the LBE subcontracting participation requirement, all bidders/proposers shall undertake adequate good faith outreach to LBE subcontractors with the following exception:

As provided in Section 14B.8(B), *if* LBE subcontracting participation in the submitted Bid *exceeds* the LBE subcontracting participation requirement set in the Contract by at least 35%, the bidder or proposer is excused from conducting or documenting its good faith efforts. LBE subcontracting participation shall be determined as the sum of all participation by Small and Micro- LBE prime contractors, Small and Micro-LBE joint venture partners, and Small and Micro- LBE subcontractors and subconsultants. Participation by SBA-LBE subcontractors and subconsultants shall be counted if under subsection 14B(8)(A). the Director permitted use of SBA-LBE firms to satisfy the Contract’s subcontracting participation requirement.

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<sup>2</sup> Please find the LBE Rules and Requirements at [https://sfgov.org/cmd/sites/default/files/FileCenter/Documents/13050-CH14B\\_Rules\\_07012015\\_Final\\_clean.pdf](https://sfgov.org/cmd/sites/default/files/FileCenter/Documents/13050-CH14B_Rules_07012015_Final_clean.pdf).

- For this RFP, exceeding the LBE participation requirement by 35% equates to **twenty-seven percent (27%)** of the work under the contract to be performed by Small and/or Micro-LBE subcontractors.
- Please note that a Small or Micro-LBE *Prime Bidder* may not count its own contract work toward this twenty-seven percent (27%) good faith outreach exception.

Otherwise, a bidder/proposer must obtain at least 80 points in order to achieve adequate good faith outreach. A bidder/proposer who fails to achieve adequate good faith outreach will be declared non-responsive, and the Bid will be rejected. Points will be allocated as follows:

Attendance at the Pre-Bid/Pre-Proposal Conference (Meeting)	15 points
Advertising for LBE Subcontractors	10 points
Identifying Subcontracting Opportunities	10 points
Contacting LBE Firms to Solicit their Interest	Up to 45 points
Following-up with Interested LBE Firms	Up to 20 points

1. ATTENDANCE AT PRE-BID/PRE-PROPOSAL MEETING. A bidder/proposer who attends the pre-bid/pre-proposal meeting scheduled by the City for the Contract shall receive 15 points. A bidder/proposer who does not attend the pre-bid/preproposal meeting will receive no points. If the City does not hold a pre-bid/preproposal meeting, all bidders/proposers will receive 15 points.
2. ADVERTISING FOR LBE SUBCONTRACTORS. A bidder/proposer who advertises for LBE subcontractors at least ten (10) calendar days before the due date of the bid/proposal shall receive ten (10) points. For example, if a bid or proposal due date is on the 17th of a month, then the last day to complete this task and receive any points is the seventh (7th) of the same month. CMD Form 2B provides specific details on advertising requirements. A bidder/proposer who does not advertise will receive no points. If the City gives public notice of the project less than fifteen (15) calendar days prior to the bid/proposal due date, all bidders/proposers will receive ten (10) points. If the bidder or proposer did not post its advertisement on a City website, then the bidder or proposer must enclose a copy of the advertisement with its bid/proposal as proof of this requirement.

3. IDENTIFYING SUBCONTRACTING OPPORTUNITIES. A bidder/proposer who identifies and selects trades/work types<sup>3</sup> (as categorized in CMD's LBE Directory<sup>4</sup>) to meet the LBE subcontracting participation requirement will receive ten (10) points. A bidder/proposer who does not identify and select trades/work types to meet the LBE subcontracting requirement will receive no points. Please note the following important information: A bidder/proposer should list only the trades/work types that it will ultimately use to meet the LBE participation requirement since bidders/proposers are held responsible for contacting the requisite number of firms (as detailed in 4. below) for each trade/work type they identify in this section.
4. CONTACTING LBE FIRMS TO SOLICIT THEIR INTEREST. A bidder/proposer who contacts those LBE firms certified in the following trades/work type: *COMPUTER: WEB DESIGN AND MAINTANANCE (GS129)*, not less than ten (10) calendar days prior to due date of the bids/proposals, will receive up to forty-five (45) points. If a bidder/proposer does not comply with paragraphs a. & b. below, one point will be deducted for each LBE firm within each identified trade/work type that is not contacted. A bidder/proposer must include verifying documentation (*i.e.*, phone logs, emails, faxes and/or etc.) with its bid/proposal.
- a. If there are less than twenty-five (25) firms within an identified trade/work type, a bidder/proposer should contact all of them.
  - b. If there are greater than twenty-five (25) firms within an identified trade/work type, a bidder/proposer should contact at least twenty-five (25) firms within such identified trade/work type.<sup>5</sup>
  - c. If a bidder/proposer does not contact any LBE firms, the bidder/proposer will receive no points.
  - d. If the City gives public notice of the project less than fifteen (15) calendar days prior to the bid/proposal due date, the allocation of points above still applies, except that the bidder/proposer may contact those LBE firms certified in the trades/work types identified pursuant to Rule XIV(B)(3) above, less than 10 calendar days prior to the due date of the bids/proposals.

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<sup>3</sup> General Service Providers, Computer: Web Design and Maint. | GS129, [http://mission.sfgov.org/hrc\\_certification/SEARCH.aspx](http://mission.sfgov.org/hrc_certification/SEARCH.aspx).

<sup>4</sup> Available at <https://sfgov.org/cmd/directory-certified-lbes>.

<sup>5</sup> As of the issue date for this RFP, 46 Vendors, are listed as certified for Computer: Web Design and Maint(enance) through <https://sfgov.org/cmd/directory-certified-lbes>.



5. FOLLOWING UP WITH INTERESTED LBE FIRMS. A bidder/proposer who performs follow-up contact with interested LBEs and negotiates in good faith with interested LBEs will receive up to twenty (20) points. An “interested LBE” means an LBE firm that expresses an interest in being a subcontractor/subconsultant to the bidder/proposer.
- a. The bidder/proposer must include documentation (*i.e.*, phone logs, emails, faxes, etc.) to verify that follow-up contacts were made. For each interested LBE firm that the bidder/proposer does not follow-up with, a point will be deducted.
  - b. A bidder/proposer who does not perform any follow-up contact with interested LBEs and does not negotiate in good faith with all interested LBEs will receive no points.
  - c. For this RFP, all proposers must submit the follow-up outreach documentation with their proposal.

#### 7.D. GOOD FAITH OUTREACH REQUIRED DOCUMENTATION.

Pursuant to Section 14B.8(e) of the LBE Ordinance, bidders and proposers must submit the following documentation:

- a. The dollar amount of each subcontract and a statement of the scope of work to be performed under the subcontract;
- b. The identification of each subcontract awarded to an LBE;
- c. Copies of all written bids submitted, including those from non-LBEs;
- d. If oral bids were received, a list of all such bids, including those from non-LBEs. The trade/work type and dollar amount for each such bid/proposal must be specified; and
- e. A full and complete statement of the reasons for selection of the subcontractors/subconsultants for each trade/work type. If the reason is based on relative qualifications, the statement must address the particular qualification at issue. If the reason is based on the bid amounts, the statement must include the amounts and describe the similarities and/or dissimilarities in the scope of work covered by the bids.

- f. For this RFP, all proposers must submit the above outreach documentation with the proposal.

#### 7.E. CMD FORMS TO BE SUBMITTED WITH ALL PROPOSALS.

Please see CMD Attachment 2: Requirements for Architectural, Engineering and Profession Services Contracts available at <https://sfgov.org/cmd/important-forms>, including:

- Form 2A - CMD Contract Participation Form (PDF pages 10 and 11 of 24)
- Form 2B – Good Faith Outreach Requirements Form (PDF pages 12 through 14 of 24)
- Form 3 - CMD Non-Discrimination Affidavit (PDF page 15 of 24)
- Form 4 - CMD Joint Venture Form (if applicable) (PDF pages 16 and 17 of 24)
- Form 5 - CMD Employment Form (PDF page 18 of 24)

*The remainder of this page intentionally left blank, the Scope of Work to begin on the next page*

## SECTION 8: SCOPE OF WORK

Table 8.1: Scope of Work Summary and Key Dates

Scope of Work Section	Deliverable	Key Date(s)	Required / As-Requested
A.i.	Authenticated User Access to User-specific Statements and Documents via Single Sign-On (SSO)	September 2023 Go-Live	Required
A.ii.	End-user Secure Document Submission through Website and Secure Email	January 2024 Go-Live	Required
A.iii.	Drupal 10 Upgrade	December 2022	Required
A.iv.	Dynamic Homepage	TBD/FY2023-2024	Required
A.v.	Two-Field Site Search Capability Improvement	TBD/FY2023-2024	Required
A.vi.	Health Plan Benefit Comparison	TBD/FY2023-2024	As-Requested
A.vii.	Crowdsourcing Tool	TBD/FY2023-2024	As-Requested
A.viii.	Benefits Cost Calculator	TBD/CY2024	As-Requested
A.ix.	Third Party Tools	TBD	As-Requested
A.x.	Equitable Accessibility Requirements and Development	Complete and Tested by or before November 18, 2023	Required
B.	Ongoing Support and Drupal Managed Maintenance	August 2022-June 2024	Required

The vendor selected as a result of this RFP will develop new content and functionality for the Website and make all required updates to the Website to ensure it meets the City's Digital Accessibility and Inclusion Standard by or before November 18, 2023, provide ongoing support, maintenance and development for the Website on an as-needed basis, and provide as-needed consulting services to SFHSS for improved functionality, streamline communications with Members, and increase Member knowledge of the benefits available to them through SFHSS.

### A. New Content and Website Functionality Development.

- i. ***Authenticated User Access to User-specific Statements and Documents via Single Sign-On (SSO):***

- a. In partnership with SFHSS and City's Department of Technology<sup>6</sup>, implement SSO at site level (sfhss.org) for Member user accounts.
- b. Solution will provide for batch creation of authenticated users integrating with Oracle's Identity and Access Management SSO.
- c. Solution will allow for at least 70,000 user accounts.
- d. An authenticated user will be able to pull down documents containing information specific to that user.
- e. Solution should optionally allow for end-user to login and account will be provisioned accordingly.
- f. Solution will allow for custom content to be delivered to the authenticated user.
  1. Respondent to advise on best practice design and manage design and implementation, including method for notifying Members of new communications from HSS to the secure account.
  2. SFHSS would like to leverage a back-end database that would store all the data.
  3. No data will be stored on the Website for security reasons.
- g. *Data Storage.*
  1. Solution will ensure that sensitive or protected data is not stored on sfhss.org in any manner.
  2. Solution would request data through a front-end API to the SQL Server database housed on a virtual server in City data center.
  3. Data must not go through any application container.
- h. Solution will implement encrypted user fields as necessary (and the selected vendor must have expertise with Lockr<sup>7</sup> Encryption keys).
- i. If necessary, modify search from using SOLR<sup>8</sup> which is not access-controlled to search functions which meet security requirements.
- j. Secure Integration:
  1. Assist in determination of whether Pantheon Secure Integration (<https://pantheon.io/docs/secure-integration>) will be required as a component of this deliverable to ensure security.
  2. Perform any additional setup of secure integration as required. SFHSS will need to license this service if it is determined it is required.
- k. Solution will render real-time in PDF the selected document/statement by pulling data from the SQL Server Database via API call.

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<sup>6</sup> <https://tech.sfgov.org/>

<sup>7</sup> <https://www.lockr.io/>

<sup>8</sup> <https://solr.apache.org/>

- i. *Available documents / statements:*
    1. Available documents / statements presented to authenticated user will be limited to only those that are applicable to the user.
    2. Data maintained in the back-end will identify which statements should be offered.
  - m. Selected vendor or their Drupal developer will advise on back-end data structure to support the solution.
  - n. Solution design must extract correct data from database and utilize this to populate the statement / document template.
  - o. Rendered PDFs can be printed and/or downloaded by end-user.
  - p. Solution must be scalable and allow SFHSS to add additional documents in the future without additional development - table driven plus insert templates
  - q. *Computer, Tablet and Mobile.* Users will have access optimized for laptop/desktop, tablet, and mobile.
  - r. *Types of Documents/Statements.* Samples of the following Documents and Statements, including the variables fields within each, are included as an Appendix to this RFP (Appendix B).
    1. Open Enrollment Letter
    2. Benefit Confirmation Statement
    3. Delinquency Notice
    4. Dependent Eligibility Verification Audit (DEVA) Letters
    5. Dependent and Domestic Partner Declaration Letters
    6. Imputed Income Letters
    7. FSA Dependent Care Notice Letters
  - s. *Modification and Creation of Documents/Statement.*
    1. SFHSS will have the ability to create new Document/Statement templates as other types of Documents and Statements are identified.
    2. SFHSS will have the ability to modify existing Document templates.
  - t. *Print and Download.* Users will be able to click a print and/or download link for each Document/Statement.
- ii. ***End-user Secure Document Submission through Website and secure email.*** This solution may be requested by SFHSS during the initial term of the agreement (August 2022 – June 2024) and will allow end-users to securely submit documentation to SFHSS leveraging sfhss.org and secure email.
- a. This solution must ensure sensitive or protected data is encrypted.
  - b. Sensitive or protected data should not be stored on sfhss.org.

- c. Solution should allow user to complete a form on sfhss.org which would generate secure email to the end-user's provided email address.
  - d. End-user can then respond to that secure email to provide sensitive information securely to SFHSS.
  - e. *MS Outlook integration:*
    - 1. SFHSS utilizes Microsoft Outlook / Email Exchange.
    - 2. Drupal developer will perform any integration steps required to generate the secure email to the end-user.
- iii. **Drupal 10 Upgrade.** The selected vendor will implement the upgrade of sfhss.org from Drupal 9 to Drupal 10 upon its release<sup>9</sup>.
- iv. **Dynamic Homepage Summary:**
- a. The selected vendor will develop a more dynamic homepage and navigation approach that will enable Members to find resources and answers to their questions more quickly using the Website. The current Website is largely a static website.
  - b. Respondents will propose a solution based on their experience, expertise, and understanding of SFHSS that will intuitively and efficiently direct end-users to the Website's content that best match their needs.<sup>10</sup>
- v. **Two-Field Site Search Capability Improvement.** The selected vendor will develop a more prominent and enhanced search bar for the Website with logic-driven results based on the following two (2) fields:
- a. **Membership (Field 1 of 2).**
    - 1. End-users will be able to select their membership group from the first of two drop-down menus.
    - 2. The first drop-down menu will contain the following seven (7) options:
      - a. City & County of San Francisco
      - b. San Francisco Superior Courts
      - c. San Francisco Unified School District

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<sup>9</sup> <https://www.drupal.org/about/10>

<sup>10</sup> By means of background information, SFHSS has determined that the answers to questions submitted by Members over the phone to the SFHSS Members Services Division are often already available on the Website. Furthermore, analysis of traffic to the Website indicates that most end-users immediately select the "Contact Us" link to reach the SFHSS Member Services Division directly.

- d. City College of San Francisco
- e. Municipal Executives Association
- f. Retiree with Medicare
- g. Retiree without Medicare

b. **Life Event (Field 2 of 2).**

1. End-users will then select their relevant Life Event from a second drop-down menu.
2. The second drop-down menu will have the following twelve (12) options:
  - a. *New Employee*: I am a New Employee and need to enroll in benefits.
  - b. *Newly Eligible*: I am newly eligible for benefits after completing my 1040 hours within a 12-month period and need to enroll in benefits.
  - c. *Retiree*: I would like to retire and enroll in retiree benefits.
  - d. *Marriage*: I got married and need to add a dependent.
  - e. *Domestic Partnership*: I am in a Domestic Partnership and need to add a dependent.
  - f. *Drop a Dependent*: I got divorced, legally separated, or I annulled or dissolved a domestic partnership, and need to drop a dependent.
  - g. *New Child/Dependent*. I had a baby or adopted a child and need to add a dependent.
  - h. *New Legal Guardian*: I became a Legal Guardian and need to add a dependent.
  - i. *Survivor Benefits*: There was a death of a member and need survivor benefits.
  - j. *Drop a Dependent*: There was a death of a dependent and need to drop a dependent.
  - k. *Lost my other Health Coverage*: I lost my other existing health coverage and need to enroll in benefits.
  - l. *Moved out of Service Area*: I moved out of my current health plan's service area.

- c. **Visuals.** The proposed solution may include pictures, icons, or other visual information such as mouse-hover highlighting.

- d. **Result.** The proposed solution will generate an output that maps to all relevant and related Website content based on the two selected variables for Membership and Life Event.
- vi. **Health Plan Benefit Comparison.** If requested by SFHSS, the selected vendor will develop a solution to embed a dynamic comparison of health plans that will support Members in understanding their options for medical, dental, and vision plans prior to electing coverage.
- a. Respondents will propose a solution based on their experience, expertise, and understanding of SFHSS that may include the information published in the CCSF Benefits Guides for employees<sup>11</sup> and for retirees.<sup>12</sup>
1. *Disclaimers.* Disclaimers provided by SFHSS will accompany any, and all, information included and generated.
  2. *Medical Plan Service Areas.* End-users will be able to select their county of residence to compare plans' level of geographic access (*i.e.*, county vs ZIP code).
  3. *Summary of Benefits.* End-users will be able to select plans to compare annual cost-sharing elements (*i.e.*, out-of-pocket maximum, deductibles, copays, coinsurance) for in-network utilization. SFHSS may require SFHSS-approved disclaimers regarding summary information, if applicable.
  4. *Anticipated Utilization.* End-users will be able to select the types and number of healthcare services they will predictably utilize (*i.e.*, regular prescriptions, giving birth, planned surgery, etc.).
  5. *Qualified Life Events (QLE).* End-users will be able to select potential QLEs (*e.g.*, birth/adoption of a child, marriage, divorce) that may influence their interest in particular health plans and their associated providers and/or hospitals (*e.g.*, whether doulas,

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<sup>11</sup> [https://sfhss.org/sites/default/files/2021-09/2022\\_CSF\\_Guide.pdf](https://sfhss.org/sites/default/files/2021-09/2022_CSF_Guide.pdf)

<sup>12</sup> [https://sfhss.org/sites/default/files/2021-09/2022\\_RET\\_Guide\\_0.pdf](https://sfhss.org/sites/default/files/2021-09/2022_RET_Guide_0.pdf)



midwives, or a specific birthing hospital are covered; or access to a specific mental health provider network).

6. *Other*. The selected vendor may recommend additional information based on their experience, expertise, and understanding of SFHSS and our Members.
- b. The proposed solution will generate an output that includes, but is not limited to:
1. *Clickwrap Agreement*. End-users may be required to click and agree to the terms and conditions of utilizing this function with language provided by SFHSS, or a prominent disclaimer (vi.a.1, above).
  2. *Features Comparison*. The generated output will provide end-users a comparison of selected health plans that may highlight key benefits elements such as patient out-of-pocket maximums, copays, and coinsurance. The comparison output may include mouse-hover/highlight functionality.
  3. *Summary of Network Access and Availability*. Output will provide end-users general information on a health plan's service area corresponding to an end-user's selected county and selected services of interest.
  4. *Estimated Utilization Costs*. Output will provide end-users a summary of potential member share of costs they will incur based on their Anticipated Utilization and QLE selections.
  5. *Sitelinks*. Output will provide end-users links to existing SFHSS webpages, resources, and outside websites approved by SFHSS for each selected health plan (*e.g.*, health plan's microsite and existing provider directory).
- Other*. Output may provide additional information based on recommendation(s) from the Respondent.

vii. ***Crowdsourcing Tool***.

- a. If requested by SFHSS, the selected vendor will develop a new Crowdsourcing Tool within the Website that will allow users to share feedback on their experience with SFHSS and/or their health, vision, dental and/or voluntary benefit plan(s). The goal of the Crowdsourcing Tool will be to improve member literacy and understanding of their benefits and plans.
  - b. Proposed specifications:
    1. The Crowdsourcing Tool will not require a user to log-in.
    2. The Crowdsourcing Tool will require the user to identify one applicable benefit, plan, vendor, or SFHSS from a comprehensive drop-down list.
    3. The Crowdsourcing Tool will require the User to enter up to three (3) characters of numerical data and answer yes or no questions.
    4. The Crowdsourcing Tool will include a check-box that will allow the user to make their response public.
- viii. **Benefits Cost Calculator.**
- a. If requested by SFHSS, the selected vendor will develop a Cost Calculator for new employees and members with a qualifying life event on the Website.
  - b. The Cost Calculator will allow new employees and members with a qualifying life event to compare costs for different combinations of health, dental and vision benefit.
  - c. A sample of a cost calculator for health benefit plans may be found here: <https://eservices.calhr.ca.gov/BenefitsCalculatorExternal/>. However, RFP respondents are asked to propose a solution unique to SFHSS.
- ix. **Third Party Tools.** As requested, the selected vendor will provide quotes for estimated cost for implementation support for supported Drupal 3rd Party integrations.

- x. ***Equitable Accessibility Requirements and Development.*** The selected vendor will ensure that the Website, including all New Content and Functionality Development (Section A) for the Website meets the City and County of San Francisco's Committee on Information Technology (COIT)'s Digital Accessibility and Inclusion Standard (approved November 18, 2021, available at <https://sf.gov/reports/november-2021/digital-accessibility-and-inclusion-standard>, the "Digital Accessibility Standard").
- a. Process.
1. *Assessment.* The selected vendor shall assess, define and present to SFHSS all proposed new developments or modifications necessary for the Website to meet the Digital Accessibility Standard. This will include an initial assessment of the current Website and identification of aspects of the Website that do not currently meet the Digital Accessibility Standard ("Initial Website Assessment").
  2. *Plan.* Upon review and approval by SFHSS that the proposed new development(s) is/are necessary to meet the Digital Accessibility Standard, the selected vendor shall submit to SFHSS a proposed plan to develop, build, test, and implement the new development(s).
  3. *Estimate.* The selected vendor shall submit an estimate of the time and cost to develop each new development or set of developments for SFHSS to review and approve. The estimate shall include all work and costs necessary to successfully deploy updates to existing Website content and/or for New Content and Functionality Development deliverables so as to meet or exceed the Digital Accessibility Standard.
- b. Sample Digital Accessibility Modifications and Improvements. Examples of modifications and improvements necessary to meet the Digital Accessibility Standard may include, but are not limited to, the following:
1. *Design Improvements.* Equitable design improvements including bringing website into compliance with the current Web Content Accessibility Guidelines, Level AA, including implementation of mobile-friendly assistive technologies on the website (see also

<https://sfgovdt.jira.com/wiki/spaces/SFGOV/pages/1916862634/Tools%2Band%2BResources>);

2. Recommend and provide implementation of clear navigation to accessibility tools and resources throughout website.
3. *Download Size Display*. Developing/integrate and implement a Website-wide tool that displays the download size of large documents in advance of loading.
4. *PDF Compatibility*. Allowing for PDFs to be compatible with screen readers and other assistive technology (such as NVDA and JAWS). See also <https://helpx.adobe.com/acrobat/using/create-verify-pdf-accessibility.html>.
5. *Color and Contrast*. Compliance with the accessibility guidelines for color and contrast and color blindness (see <https://sfgovdt.jira.com/wiki/spaces/SFGOV/pages/1916928089/Color+and+Color+Contrast>).
  - a. Color Contrast Checker by WebAIM (<https://webaim.org/resources/contrastchecker/>; <https://webaim.org/resources/linkcontrastchecker/>).
  - b. Color Blindness Filter by Toptal to test web pages for color blindness: <https://www.toptal.com/designers/colorfilter/>.
6. *Accessibility Tool*. Developing/integrate and implement an accessibility tool to make content more accessible sitewide (see: <https://www.powermapper.com/products/sortsite/checks/accessibility-checks/>). Examples of accessibility include: whitehouse.gov and alembicsf.com;
7. *Language Translator*. Develop or integrate an existing language translator on the Website allowing for the translation of pages and content from English into Spanish, Chinese (traditional), and Filipino:  
<https://sfgovdt.jira.com/wiki/spaces/SFGOV/pages/1916928167/Language+Access>

c. *Time and Cost Estimate for Digital Accessibility Standard Compliance.*

1. Proposals will provide a reasonable estimate of the number of hours and total cost necessary for the Website to meet the Digital Accessibility Standard.
2. Proposals will provide a proposed production and launch calendar for meeting each of the Digital Accessibility Standards by or before November 18, 2023.
3. If that estimate is to exceed two hundred and seventy-seven (277) hours or fifty thousand dollars (\$50,000), the proposal will include an itemized list of new developments, updates and modifications necessary to meet the Digital Accessibility Standard.

B. **Ongoing Support and Drupal Managed Maintenance.** Contractor will reserve at least 35 (thirty-five) hours per month to provide Drupal Support and Drupal Managed Maintenance to SFHSS. If hours remain unused at the end of any month, the unused hours will roll-over continuously month-to-month for the duration of the contract. Contractor will be available to provide Ongoing Support and Maintenance between the hours of 8:00 a.m. to 5:00 p.m. PT, Monday through Friday, with no greater than a one (1) hour response time. Contractor will agree to working with the City to establish priority level with associated response/resolution time constraints to complete reported Support and Maintenance activities (e.g. Priority Level 1: Urgent/High= 1-2 hours for response and resolution, Priority Level 2: Moderate/Medium= 2 business days for response and resolution, Priority Level 3: Routine/Low= 5 business day for response and resolution...etc.).

- i. ***Drupal Support.*** Contractor will provide technical support for issue resolution as determined by SFHSS. Some Drupal Support tasks may include, but are not limited to, the following:
  - a. Drupal design services (UI/UX) - assess website usability for improvement opportunities;
  - b. Improve Website search functionality;
  - c. Improve content design and flow on website to be more intuitive;

- d. Additional required optimization for new or updated browser platforms, including for tablets and mobile devices;
  - e. Theme and module development and installation;
  - f. Address additional future Website accessibility requirements and standards;
  - g. Resizing/optimizing video and images;
  - h. Search Engine Optimization (SEO);
  - i. Assist SFHSS with the management of content, including recommendations of best practices for content management;
  - j. Assist SFHSS with implementation of new content;
  - k. Assist with website analytics;
- ii. ***Drupal Managed Maintenance***. Drupal Managed Maintenance may include, but is not limited to, the following:
- a. Drupal Core and Contributed module security and code updates. Scan for bad links, malware, slow pages speeds, etc.;
  - b. Monitor site for performance and security issues and provide reporting and resolution;
  - c. Performance optimization;
  - d. Fixes and updates, *e.g.*, resolving random error messages, problematic view, etc.;
  - e. Create roles;
  - f. Develop taxonomy;
  - g. Migration and upgrade (new versions of Drupal, new site hosts, between environments, impact analysis, etc.);

- h. Support for 3rd Party tools (*e.g.*, Google Analytics, accessibility and assistance technologies, crowdsourcing tool) including quotes for estimated cost for implementation support.
- i. Emergency maintenance support;
- j. Status calls including timeline for new features available in upcoming Drupal updates and suggestions/examples for usage; and
- k. User training and supporting documentation.
- l. Written documentation and training services for SFHSS web developers, content contributors and content editors on how to continuously update the new website with content, how to use new development tools including accessibility functions, Drupal best practices, and how to troubleshoot common errors.

## SECTION 9: RFP RESPONSE REQUIREMENTS

### 9.A. PRE-PROPOSAL CONFERENCE CALL AND MEETING

SFHSS will hold a pre-proposal conference call to receive general questions and, where appropriate, provide clarification on RFP requirements at **12:00 p.m. (PT) on Friday, June 3, 2022**.

The pre-proposal conference will be conducted via Microsoft Teams. Verbal comments made by SFHSS at the pre-proposal conference are not binding.

All questions must be submitted in writing to SFHSS following the call.

Should there be a need to communicate information to Respondents as a result of the pre-proposal conference, an Addendum with answers and clarifications will be issued and posted on the SFHSS website.

All attendees at the Pre-Proposal Conference must identify themselves on the call.

**If a Respondent, prospective subcontractor, or other stakeholder is interested in participating in the Pre-Proposal Conference Call, please email [patrick.chang@sfgov.org](mailto:patrick.chang@sfgov.org) and please cc:**

[michael.visconti@sfgov.org](mailto:michael.visconti@sfgov.org) with the name(s), email(s) and title(s) of all who will be attending by or before 4:00 p.m. PT on *Thursday, June 2, 2022*.

#### 9.B. RFP QUESTIONS AND ANSWERS

1. Respondents may submit questions regarding the RFP to SFHSS in writing via email to Patrick Chang ([patrick.chang@sfgov.org](mailto:patrick.chang@sfgov.org)) and cc: Michael Visconti ([michael.visconti@sfgov.org](mailto:michael.visconti@sfgov.org)).
2. Respondent(s) shall provide specific information to enable SFHSS to identify and respond to their questions.
3. At its discretion, SFHSS may contact a Respondent to seek clarification regarding any inquiry received.
4. SFHSS will publish answers to all submitted questions on a rolling basis between May 23, 2022, and June 17, 2022, on the SFHSS website at <https://sfhss.org/RFPs>.
5. SFHSS reserves the right to offer additional question and answer opportunities and will make such opportunities available to all Respondents.
6. 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 its own risk.

#### 9.C. DEADLINE FOR RFP QUESTIONS

1. Respondents shall submit all questions regarding the RFP in writing by **12:00 p.m. (PT) on Friday, June 10, 2022 (Deadline for RFP Questions)**.
2. Questions submitted after this date may be disregarded by SFHSS. However, SFHSS reserves the right to answer any questions submitted after the Deadline for RFP Questions.

#### 9.D. MINIMUM QUALIFICATIONS

Respondents must meet the following minimum requirements at the time their Proposal is submitted to SFHSS (Minimum Qualifications):

1. Demonstrated experience providing a minimum of three (3) years of Drupal development and Support Services since November 2019.



2. Experience providing Drupal development and support with at least one (1) government or one (1) non-profit organization within the past six (6) years or for an organization that directly supports or serves one or more government entity(ies).
3. Demonstrated experience providing Drupal accessibility development and support services directly related to compliance with the American Disabilities Act (ADA), Section 508 of the Rehabilitation Act, and the Web Content Accessibility Guidelines (WCAG), Level AA and higher.
4. Acknowledgement of receipt and review of the following Key References for this RFP:
  - a. Americans with Disabilities Act (ACA) requires that online content be accessible to people with disabilities. <https://beta.ada.gov/web-guidance/>.
  - b. Section 508 of the Rehabilitation Act requires compliance with the Web Content Accessibility Guidelines (WCAG). <https://www.fcc.gov/general/section-508-rehabilitation-act> and <https://www.w3.org/WAI/standards-guidelines/wcag/>.
  - c. City and County of San Francisco's Committee on Information Technology (COIT)'s Digital Accessibility and Inclusion Standard (Approved November 18, 2021) follows WCAG 2.1 and sets a higher standard. <https://sf.gov/reports/november-2021/digital-accessibility-and-inclusion-standard> and <https://www.w3.org/TR/WCAG21/>.
  - d. City and County of San Francisco's Citywide Cybersecurity Policy <https://sf.gov/resource/2021/citywide-cybersecurity-policy>.
5. Respondent is a Corporation, Limited Liability Company or Non-Profit entity in Good Standing with the State of California (or Respondent's state of formation).
6. Respondent is licensed to do business in California.
7. Respondent is currently or will be able to comply as of the date of its Proposal with the data sharing and security requirements listed in Appendix A.1 (Standard Agreement), including, but not limited to, Article 13, and Appendix A.2.
8. Respondent possesses the minimum insurance coverages set forth in Appendix A.1 (Standard Agreement), including, but not limited to, Cyber and Privacy Insurance and Technology Errors and Omissions Insurance.

9. Respondent has reviewed the conditions of becoming an Approved City Supplier including, but not limited to, San Francisco Administrative Code Chapter 12B, and agrees to become an Approved City Supplier by or before August 1, 2022.

#### 9.E. PROPOSAL

By submitting a Proposal, a Respondent, if selected by SFHSS as a result of this RFP, shall be held to all statements therein. This RFP and the selected respondent's proposal may be made a part of an agreement resulting from this RFP.

1. Proposal Submission Deadline. **Proposals must be submitted to SFHSS via email to [patrick.chang@sfgov.org](mailto:patrick.chang@sfgov.org), cc: [michael.visconti@sfgov.org](mailto:michael.visconti@sfgov.org) by or before 12:00 PM (PT) on Wednesday, July 6, 2022 (Deadline for Proposals).**
2. Proposals submitted by other means, including U.S. Postal Service, common carrier, or personal messenger will be rejected.
3. Late submissions will not be considered, and shall be deemed non-responsive, including those submitted late due to delivery service failure.
4. Respondents are advised, but not required, to include a delivery receipt confirmation to confirm that the email transmittal and any attached proposal is received by SFHSS.

#### 9.F. LIMITATIONS ON THE NUMBER OF PROPOSALS AND JOINT PROPOSALS

In the instance of a planned joint Proposal from two (2) or more parties, one entity must be identified as the Respondent. The contact, address, telephone and email information are required for the Respondent as well as any Joint Respondent(s). Respondent will serve as SFHSS' primary point of contact and the Respondent will bear the sole responsibility for performance under any awarded contract. A Respondent may not submit more than (1) Proposal in response to the RFP. Respondent must have the legal authority to independently enter into a contract to perform services described in the RFP.

#### 9.G. RELEVANT INFORMATION

Each proposal shall contain only relevant information that is specific to this RFP and the specific questions and requests contained herein. While there is no intent to limit the content of any

proposal, a Respondent must emphasize simple, straight-forward and concise statements that satisfy the requirements of the RFP, and clearly identify applicable subsections or scope. Respondents accept that superfluous information may be disregarded.

## 9.H. PROPOSAL STRUCTURE

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

### **Section 1. Cover Letter (word / page limit: 500 words or one (1) page<sup>13</sup>)**

Respondent shall identify its business name, address, telephone number, and email address; designate the legal form of Respondent (sole proprietorship, partnership, corporation, etc.); the name, address, telephone number, and email address of Respondent's authorized representative and primary point of contact.

### **Section 2: Table of Contents (word / page limit: 500 words or one (1) page)**

Respondent shall list all Proposal contents and attachments, and clearly identify the relevant sections and page numbers of the Proposal and the corresponding section(s) of the RFP, as applicable.

### **Section 3A: Executive Summary (word / page limit: 1,500 words or three (3) pages)**

Respondent Executive Summary shall include, at minimum, the following information:

- Respondent's business name, address, telephone number, email address and fax number.
- Respondent's legal formation (*e.g.*, corporation, LLC, non-profit, etc.), and the year the entity was substantially organized as it now exists.
- Respondent's parent company and all subsidiaries, as applicable.
- The name of any sole proprietor, partners, or principal officers, as appropriate.
- Respondent's greater organizational structure, including parent company, subsidiaries and partners, recent acquisitions or mergers (within the last two (2) years), or any known future acquisitions or mergers.
- The name of and background of Respondent's primary account manager or executive responsible for overseeing and carrying out Respondent's responsibilities if awarded a contract as a result of the RFP.
- Respondent's agent for service of process (name and address) and/or the name and address of the entity that receives legal notices for Respondent.
- Respondent's Federal Employer Tax Identification Number and a completed IRS W-9 form.

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<sup>13</sup> Standard 8.5 x 11 inch or equivalent, single or double spaced, standard one (1) inch margins.

- Respondent's proposed subcontractors (if any).
- If the Proposal is being submitted by Respondent in partnership, cooperation or association with one or more Joint Respondents or Subcontractors:
  - A full and complete listing of all Joint Respondents, including addresses, telephone numbers, email addresses and fax numbers.
  - Legal formation of each Joint Respondent.
  - Primary responsibilities of each Joint Respondent if Respondent is awarded a contract as a result of the RFP.
  - Length of relationship between each Joint Respondent and Respondent.
- If any of the above information is unavailable for Respondent entity, Respondent must submit the same or similar information from Respondent's parent entity, if available.

**Section 4: References (word / page limit: 1,000 words or two (2) pages)**

- Respondents shall provide two (2) references for which Respondent has performed similar services during the past 3 (3) years. For each reference, Respondent shall include a brief description of the work.
- References will not be contacted by the RFP Evaluation Panel but may be contacted by SFHSS to confirm minimum qualifications to bid.

**Section 5: Evidence Supporting Certification of Minimum Qualifications (no word / page limit but must be relevant and limited to the supporting information required to establish Minimum Qualifications only)**

Respondent shall submit reasonable and appropriate documents demonstrating how Respondent meets each Minimum Qualification (Sec. 9.D.).

**Section 6: Written Proposal (word / page limit: 5,000 words or ten (10) pages)**

- Respondent's written proposal shall clearly identify its method and strategy for the proposed services, why respondent is uniquely qualified to accomplish the services, any services or specifications that a respondent is unable to meet, and any highly relevant additional services, expertise or experience that respondent is capable of providing.
- Respondents are advised to review all deliverables and if applicable based on Respondent's experience and publicly available knowledge of SFHSS and the City, as well as our Member population, recommend alternative approaches to deliverables or solutions.
- Respondents are also advised to review Section 9.G. (Relevant Information), in particular with regard to relevant additional services that respondent is capable of providing.

**Section 7: Cost Proposal**

- Respondent's cost proposal shall clearly identify all costs and fees for services and deliverables.
- Each respondent's cost proposal shall include the following:

Scope of Work Section	Deliverable	Key Date(s)	Required / As-Requested	Cost
A.i.	Authenticated User Access to User-specific Statements and Documents via Single Sign-On (SSO)	September 2023 Go-Live	Required	Estimated Hours: ____ Hourly Rate(s): ____ Estimated Not-to-Exceed Cost: ____
A.ii.	End-user Secure Document Submission through Website and Secure Email	January 2024 Go-Live	Required	Estimated Hours: ____ Hourly Rate(s): ____ Estimated Not-to-Exceed Cost: ____
A.iii.	Drupal 10 Upgrade	December 2022	Required	Estimated Hours: ____ Hourly Rate(s): ____ Estimated Not-to-Exceed Cost: ____
A.iv.	Dynamic Homepage	TBD/FY2023-2024	Required	Estimated Hours: ____ Hourly Rate(s): ____ Estimated Not-to-Exceed Cost: ____
A.v.	Two-Field Site Search Capability Improvement	TBD/FY2023-2024	Required	Estimated Hours: ____ Hourly Rate(s): ____ Estimated Not-to-Exceed Cost: ____
A.vi.	Health Plan Benefit Comparison	TBD/FY2023-2024	As-Requested	Estimated Hours: ____ Hourly Rate(s): ____ Estimated Not-to-Exceed Cost: ____
A.vii.	Crowdsourcing Tool	TBD/FY2023-2024	As-Requested	Estimated Hours: ____ Hourly Rate(s): ____ Estimated Not-to-Exceed Cost: ____

Scope of Work Section	Deliverable	Key Date(s)	Required / As-Requested	Cost
A.viii.	Benefits Cost Calculator	TBD/CY2024	As-Requested	Estimated Hours: ____ Hourly Rate(s): ____ Estimated Not-to-Exceed Cost: ____
A.ix.	Third Party Tools	TBD	As-Requested	Hourly Rate(s): ____
A.x.	Equitable Accessibility Requirements and Development	Complete and Tested by or before November 18, 2023	Required	Estimated Hours: ____ Hourly Rate(s): ____ Estimated Not-to-Exceed Cost: ____
B.	Ongoing Support and Drupal Managed Maintenance	August 2022- June 2024	Required	Hourly Rate: ____
C.	Any additional costs, rates, or fees and a detailed description, as applicable.	\$ ____; Description: _____... \$ ____; Description: _____... ...		

### Section 8: Standard City Agreement (words / page limit: not applicable)

- The Standard Agreement (Appendix A.1) and Business Associates Agreement (Appendix A.2) are integral components of Respondent's Proposal. Respondent's Proposal will serve as the base for negotiations with the selected respondent.
- Respondent must be prepared to agree to all terms of the attached Standard Agreement as presented or Respondent's Proposal may be rejected.
- Respondent must include a copy of the Standard Agreement with its Proposal that shows the changes Respondent proposes be made if it is selected by SFHSS as a result of this RFP.
- If Respondent fails to identify an objection to any particular term or condition, the term or condition will be deemed agreed to by Respondent.
- SFHSS reserves the right to discuss any Respondent proposed change to terms or conditions and to clarify and supplement such proposal.
- Proposed changes to any particular term or condition of the Standard Agreement will be used to determine the responsiveness of Respondent's Proposal.
- Proposals that are contingent upon SFHSS and the City making substantial changes to the material terms and specifications published in the RFP may be disqualified. SFHSS will consider the number and nature of the terms and conditions Respondent is objecting to in determining the likelihood of completing an agreement with Respondent if selected.

- SFHSS reserves the right to add, delete, or modify language from Appendix A.1 (Standard Agreement) and Appendix A.2 (Business Associates Agreement) when preparing the final form of the agreement with the selected respondent.

### **Section 9: Insurance (word / page limit: not applicable)**

Respondent shall provide evidence of the amount of insurance coverage carried as defined in Appendix A (Standard Agreement), Article 5.

#### **9.I. PROPOSAL PROVISIONS AND RESERVATION OF RIGHTS BY THE CITY**

1. Disposition of Proposals, Public Disclosure and Confidentiality. Upon opening, all Proposals in response to the 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 Sec. 67.24(e)) and the California Public Records Act (California Government Code, Sec. 6250). In accordance with San Francisco Sunshine Ordinance, contracts, bids, responses to requests for proposals, Proposals, and all other records of communications between the Health Service Board, the officers and employees of SFHSS, members of the Evaluation Panel, and persons or firms seeking contracts, including but not limited to respondents, prospective bidders, and incumbent providers of in-scope 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.
2. Confidentiality. If a Respondent believes that any portion of its Proposal is exempt from public disclosure under the San Francisco Sunshine Ordinance or applicable California Public Records law, such portion may be marked "CONFIDENTIAL". SFHSS may deny public disclosure of any portions so designated and will work with Respondent to preserve confidentiality of documents. 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 Health Service 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. 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 contractors, vendors and/or suppliers (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 such a conflict of interest exists or may exist. 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, Account Executive, and key staff 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.
4. Request for Clarification. 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.
5. Contract Delay Contingency. In the event the implementation date under an agreement resulting from this RFP is delayed until a later year for any reason, the parties shall make a good faith effort to maintain the contractual relationship and to amend the applicable agreement as necessary to address the delay. In this event, SFHSS also reserves the right to terminate the applicable agreement at its sole discretion.
6. Cancellation. Should Respondent wish to cancel, revise, or rescind its Proposal, a written letter so stating must be received by SFHSS via email ([patrick.chang@sfgov.org](mailto:patrick.chang@sfgov.org), cc: [michael.visconti@sfgov.org](mailto:michael.visconti@sfgov.org)) 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.
7. Validity of Response. Any Proposal must remain valid for at least sixty (60) days. This includes services, pricing, as well as the proposed staffing assignments.



8. Expenses. There is no expressed or implied obligation for SFHSS to reimburse any Respondent for expenses incurred in responding to the RFP. SFHSS reserves the right to retain all submitted questions and responses to the RFP and use any information or ideas contained therein.
9. Authorized Communications. Respondent will direct all communications, in writing, via email, to Patrick Chang, Principal Analyst, San Francisco Health Service System, [patrick.chang@sfgov.org](mailto:patrick.chang@sfgov.org); cc: [michael.visconti@sfgov.org](mailto:michael.visconti@sfgov.org).
10. Unauthorized Communications. **Respondents are precluded from contacting other SFHSS staff, the Health Service Board, members of the RFP Evaluation Panel, or any partners or consultants of SFHSS**, including but not limited to, other City employees, representatives, or officials, regarding the RFP. Respondents are precluded from issuing news releases, social media postings, media releases, or other similar public releases of information regarding the RFP or the contents herein without prior written approval from SFHSS are prohibited. Failure to adhere to the prohibition on unapproved communications may result in disqualification from the RFP.
11. Rejection of Proposal. SFHSS reserves the right to consider as acceptable only those Proposals submitted in compliance with all the requirements set forth in this RFP, all Appendices thereto and which demonstrate an understanding of the scope of services. At its sole discretion, SFHSS reserves the right to reject any Response for reasons including, but not limited to:
  - Collusion among two or more Respondents (including, but not limited to, Respondent's employees, consultants, officers, partners or subcontractors)
  - Conflicts of interest;
  - Submission of a conditional or incomplete Proposal;
  - 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;
  - Non-responsive Proposal(s);
  - Proposals submitted by a non-responsible Proposer, and/or

- Any other reason which, in SFHSS' opinion, the response or Proposal fails to meet the conditions and requirements of this RFP.
12. 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. 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 respondent for reasons other than lowest price.
  13. Reserved. (Commissions)
  14. Consent to Reassign Personnel. If selected by SFHSS as a result of this RFP, Respondent shall not reassign personnel assigned to the contract during the term of the contract without prior notification to SFHSS and the Board, including the account executive, account manager, or key staff. If personnel are unable to perform duties due to illness, resignation, or other factors beyond Respondent's control, Respondent shall make every reasonable effort to provide suitable Substitute Personnel for review and approval by SFHSS.
  15. Substitute Personnel. If selected by SFHSS, Respondent shall coordinate with SFHSS regarding the selection of Substitute Personnel including from the personnel identified within the Respondent's RFP response, 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 Respondent 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.
  16. Removal of Personnel. SFHSS reserves the right to request personnel be removed from performing any services upon written notice from SFHSS including, but not limited to, for actual or perceived conflict(s) of interest. If any personnel are removed, Substitute Personnel shall be assigned.
  17. Objections to the RFP Terms. Should Respondent object on any ground to any provision or legal requirement set forth in this RFP, Respondent must, not less than ten (10) calendar days before the Deadline for Proposals, provide written notice to SFHSS at [patrick.chang@sfgov.org](mailto:patrick.chang@sfgov.org); cc: [michael.visconti@sfgov.org](mailto:michael.visconti@sfgov.org) 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).

**Deadline for Objections to RFP Terms: 11:59 p.m. (PT), Sunday, June 26, 2022**

## 18. Campaign Reform and Prohibition on Behested Payments

- a. Campaign Reform Ordinance. Respondents must comply with Section 1.126 of the San Francisco Campaign and Governmental Conduct Code, which states as follows:

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.

- b. Prohibition on Behested Payments. Respondents must comply with the City's Behested Payment Legislation, approved by the Board of Supervisors on December 14, 2021, available at <https://sfethics.org/compliance/behested-payments>; see also [https://codelibrary.amlegal.com/codes/san\\_francisco/latest/sf\\_campaign/0-0-0-47660](https://codelibrary.amlegal.com/codes/san_francisco/latest/sf_campaign/0-0-0-47660).

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

19. Reservations of Rights by the City. The issuance of this RFP does not constitute an agreement by SFHSS, the Health Service Board, or the City that any contract will be entered into by SFHSS, the Board, or the City. 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 a 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; and/or
- Determine that no contract(s) will be pursued.

## 9.J. EVALUATION

This section describes the requirement and guidelines used for analyzing and evaluating Respondent Proposal. SFHSS intends to select the Respondent that provides the best overall qualifications, inclusive of cost 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 the needs of the SFHSS and Members.

### **1. Proposal Deadline and Review of Minimum Qualifications**

SFHSS will determine, upon receipt of Proposals, in its sole discretion, whether Respondents have met the Minimum Qualifications (Sec. 9.D.). Should SFHSS require additional information from any Respondent to confirm Minimum Qualifications, SFHSS will notify Respondent within ten (10) working days of receipt of Proposal. Respondent will then have five (5) working days to submit additional information to SFHSS. If it is determined that Respondent does not meet the Minimum Qualifications, Respondent's Proposal will be deemed non-responsive and there will be no further review, either by SFHSS, or the Evaluation Panel. However, SFHSS reserves the right, in its sole discretion, to waive minor administrative irregularities.

### **2. Evaluation Panel**

If Respondent meets the Minimum Qualifications (Sec. 9.D.) as determined by SFHSS, SFHSS will submit Respondent(s) Proposal(s) to a panel of SFHSS-selected representatives and subject-matter experts for evaluation (the "Evaluation Panel").

The Evaluation Panel will review each minimally qualified and responsive Proposal. Collaborative evaluation of Proposals will only be permitted so long as all members of the Evaluation Panel are present in person, by phone, by video conference, or a combination thereof ("Evaluation Panel Discussions").

Evaluation Panel Discussions will be attended by members of the SFHSS Contracts Division, and internal subject matter experts (SMEs). However, only the Evaluation Panel shall be allowed to determine how well each Proposal responds to the RFP, and how each Proposal and Respondent meets the needs of SFHSS. The identities of the Evaluation Panel and any SMEs will remain confidential throughout the RFP process.

### **3. Respondent Proposal, Questionnaire, and Scoring**

The evaluation criteria listed below will be used to evaluate and rank all Proposals:

- Each section in the RFP to be included in Respondent Proposal has been assigned a maximum number of available points (Maximum Points).
- Proposals will be weighted by the Evaluation Panel using the following overarching categories and weighting:

<b>Category</b>	<b>Weight</b>
Value of Cost Proposal	25%

Proposal and Proposed Approach to Required Deliverables (A.i. – A.v.)	20%
Proposal and Proposed Approach to As-Requested Deliverables, including evaluation and alternative approaches, if applicable (A.vi. – A.ix.)	20%
Proposal Proposed Approach to Equitable Accessibility Requirements and Development (A.x.)	10%
Proposal and Proposed Approach to Ongoing Support and Drupal Managed Maintenance (B.)	10%
Prior Experience, Team, Approach to Project Management	10%
RFP and City Terms and Conditions	5%
<b>Total</b>	<b>100%</b>

#### 4. Oral Interviews

At SFHSS' sole discretion, following the review and evaluation of the Proposals, SFHSS may invite Respondent(s) to an oral interview before the Evaluation Panel (Oral Interviews). If conducted, the Oral Interviews may be weighted equally to the proposal. The Oral Interviews will be conducted via Microsoft Teams video conference. SFHSS will provide questions to Respondent(s) in advance of the Oral Interviews. SFHSS will also determine the types and numbers of personnel from Respondents that will be allowed to participate in the Oral Interviews.

However, SFHSS reserves the right to select and recommend the highest-ranking Respondent(s) without conducting Oral Interviews.

Oral interviews, if required by SFHSS, will occur between Monday, August 1, 2022, and Friday, August 5, 2022, during normal business hours and will last approximately one (1) hour.

#### 5. Final Ranking Announcement

SFHSS will announce the final ranking of all respondents following review by the Evaluation Panel and/or following the Oral Interviews (if conducted) via email to each Respondent's authorized representative and primary point of contact.

#### 6. Contract Negotiation

Following the announcement of the final ranking, SFHSS will commence contract negotiations with the highest-ranked respondent. If SFHSS is unable to negotiate a satisfactory contract with the highest-ranked respondent within a reasonable time, or if the highest-ranked respondent deviates materially from the terms of the RFP including all addendum, amendments and

attachments thereto, SFHSS, in its sole discretion, may terminate negotiations with the highest-ranked respondent and begin contract negotiations with the next highest-ranked respondent.

## 7. Protests

- a. Protest of Non-Responsive Determination or Failure to Meet Minimum Qualification. Within five (5) working days of the date 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 end of the fifth (5th) working day following SFHSS' issuance of the notice of non-responsiveness. The day of the issuance of the notice of non-responsiveness shall not count towards these five working days (day zero). 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 legally 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.
- b. Protest of Ranking, Scoring, or Contract Award. Within five (5) working days of the date of the announcement and notice of final ranking by SFHSS, any Respondent that has submitted a responsive Proposal and believes that SFHSS has incorrectly ranked the Respondents, may submit a written notice of protest. Such notice of protest must be received by SFHSS on or before 5:00 PM (PT) on the fifth (5th) working day after the day of the notice of final ranking (day zero). 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.
- c. Delivery of Protests. Respondent is responsible for delivery to, and confirmation of receipt by, SFHSS of any protest by the deadlines specified in this Section. Protests must be delivered via email to: Michael Visconti, Contracts Administration Manager, San Francisco Health Service System at [michael.visconti@sfgov.org](mailto:michael.visconti@sfgov.org) with copies sent to: [abbie.yant@sfgov.org](mailto:abbie.yant@sfgov.org) and [erik.rapoport@sfcityatty.org](mailto:erik.rapoport@sfcityatty.org). Protests or notice of protests made orally, *e.g.*, by

telephone, by U.S. Postal Service or common carrier, my messenger or other means, will not be considered or accepted by SFHSS.

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