

Request for Information

DATE: July 18, 2022

TO: **Healthy Aging Resource Vendors**

FROM: Michael Visconti
Contracts Administration Manager
San Francisco Health Service System

RE: **Request for Information (RFI) for Healthy Aging Programs and Applications for SFHSS Retiree Members (RFPQHSS2022.W6)**

I. RFI Intent and Timeline

A. Intent

The San Francisco Health Service System (SFHSS) issues this Request for Information (RFI) to determine the availability and qualifications of a vendor partner capable of providing an evidence-based or evidence-informed program designed to provide retired SFHSS members living in the San Francisco Bay Area (the "Target Population") with tools to support healthy aging and empowerment so they are able to better take care of themselves and their loved ones (the "Program").

The Program should help participants develop sustainable behaviors that encompass key aspects of aging well, including, but not limited to, health, finances, relationships, personal growth, and community involvement. At the completion of the Program, SFHSS expects participants to (a) report an improved state of personal well-being, (b) report improvements in their sense of community or involvement in their community, and/or (c) have taken tangible steps to increase their longevity through developing actionable and sustainable goals.

B. Timeline

The following is a list of key deadlines and dates for this RFI:

RFI Issued.....Monday, July 18, 2022
Deadline for RFI QuestionsFriday, August 5, 2022 (12:00 p.m. PT)
SFHSS Response to QuestionsAugust 8 – August 12 (on a rolling basis)
Deadline for ResponsesTuesday, August 23, 2022 (12:00 p.m. PT)
Online Demonstration.....September 7, 8 & 9, 2022 (estimate)

II. The San Francisco Health Service System

SFHSS is dedicated to providing outstanding health and other employee benefits to SFHSS Members, preserving and improving sustainable, quality health benefits, enhancing the well-being of employees, retirees, and their families, and adhering to the highest standards of service. SFHSS executes all process phases related to the operations and administration of non-pension benefits (including health, dental and vision) 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, the San Francisco Superior Court, and their covered dependents (collectively, Members) under the authority granted by 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.

Target Population: As of January 1, 2022, the SFHSS Member population includes approximately 35,000 retirees, primarily aged 55 and older. Of these, roughly 28,000 (80%) live within one of the nine Bay Area counties (Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma). Retirees include Members aged 65 and older who are eligible for Medicare and what SFHSS refers to as Early Retirees – those retirees who are not yet Medicare-eligible.

- More information on the demographics of the population which is served by SFHSS can be found here: <https://sfhss.org/resource/2022-sfhss-demographic-report>
- More information on the SFHSS 2018 Retiree Well-Being Survey Results can be found here: https://sfhss.org/sites/default/files/2018-12/RM_121318_2018%20Retiree%20Well-Being%20Update.pdf
- More information about SFHSS and other programs offered by SFHSS can be found here: <https://sfhss.org/>

III. SFHSS Needs

SFHSS seeks to align our health and well-being programs and services with the needs of our retirees, with an emphasis on whole person well-being.

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C. Program Specifications

SFHSS is looking to select a single Program with the following:

- i. Two Program Tracks. The Program will support both (a) a base Program track (“Program A”) and (b) an extended Program track (“Program B”) that expands on Program A to focus on additional topics(s), for example, caregiver well-being and an introduction to preparing to provide care to loved ones. SFHSS will accept vendors’ recommendations on the total length of each Program track (for example, Program A is a minimum of 10 weeks and Program B is a minimum of 12 weeks), the total number of sessions per week, the length of each session, and the sequence of topics (RFI Sec. III.B, “Focus Areas and Topics of Interest”) as well as any underlying rationale(s) and evidence supporting these recommendations.
- ii. Coaching. Coaching will need to be an element of the Program to (a) assist participants’ in goal setting, (b) provide tools and resources related to the various topics covered throughout the program in order to assist participants in taking action to sustain behavioral changes and improve individual well-being, (c) add stability to participants’ lives, and/or (d) strengthen their community ties.
- iii. Targeted First Year Engagement. The Program will have the capacity to engage between 100 and 200 Retirees across multiple cohorts within the first 12 months of the Program. SFHSS will accept vendors’ recommendations on cohort size and meeting frequency (see subsection A.i, “Two Program Tracks”, above).
- iv. Engagement. The Program will provide evidence of consistent participant engagement throughout the Program and evidence participant sentiments of being supported in achieving individual participant goals.
- v. Goals. The Program will strive to actively improve participants knowledge on health topics being introduced and participants having taken action and sustained that behavior to make changes in their lifestyle to support well-being. This may include improved (a) physical activity levels, (b) healthy eating and hydration habits, (c) use of advance planning, (d) feeling more socially connected within their community, (e) improved mental health and/or (f) utilization of caregiving resources.

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- vi. Virtual and/or In-Person Cohorts. The Program will support cohorts that are (a) virtual, (b) in-person, or (c) a combination thereof.
 - 1. Respondents are advised to include in their responses any underlying rationale(s) for their proposed approach based on current events and the demographics of the SFHSS population.
 - 2. If the recommendation is for in-person or combined in-person/virtual cohorts, please describe the in-person locations and/or facilities and any added costs or requirements for in-person attendance.

- vii. In-Cohort and Post-Cohort Reporting. The Program will facilitate feedback opportunities at regular intervals using surveys or similar methods to (a) evaluate participant engagement with the program content, (b) progress towards identified goals, and (c) any other indicators of the Program's effectiveness and success (to be proposed by the selected vendor based on their expertise and experience and agreed upon in collaboration with SFHSS).
 - 1. The proposed approach would include regular reporting during the Program (e.g., weekly or bi-weekly).
 - 2. The proposed approach would include follow-up check-ins and reporting to SFHSS, such as three-, six- and twelve-month post-cohort follow-up surveys.
 - 3. The proposed approach should facilitate one or more cohort discussion groups (individually or with multiple / all cohorts collectively) during a scheduled feedback intervals to collect information on participants' experiences, successes, barriers to success, adherence to Program course, and input on what Program characteristics could further support their success moving forward. SFHSS will also accept vendors' recommendations on approaches in support of this goal.

D. Focus Areas and Topics of Interest

An ideal program would include a focus on the following areas and topics of interest and include small group interaction, goal setting, tools, and resources to help with developing individual strategies:

- i. Exercise and nutrition
 - a. Physical activity
 - b. Healthy eating and hydration
 - c. Weight management
 - d. Fall Prevention

- ii. Mental health
 - a. Memory and mental acuity
 - b. Improved Sleep
 - c. Stress management
 - d. Relaxation techniques
- iii. Health care
 - a. Routine and preventive care
 - b. Managing chronic conditions
 - c. Medication management
 - d. Advance Planning
- iv. Financial
 - a. Financial literacy
 - b. Financial well-being
- v. Emotional health and social well-being
 - a. Healthy relationships & social connectedness
 - b. Community engagement
 - c. Gratitude and mindfulness
- vi. Caregiver support (Program B only (RFI Sec. III.A.i.))
- vii. Meaningful employment or community service after career (e.g., volunteering)

E. Materials

SFHSS seeks a Program that will incorporate evidence-based and/or evidence-informed materials centering on the above topics that are inspiring and provide manageable steps and practical tips that will give participants the skills and tools to achieve self-sufficient lives as they age. Materials may include printed or electronic written collateral, audio or video, and any other participant-facing communications.

F. Directing Participants Towards Additional Covered Health Plan Resources

An ideal Program will be customizable and allow SFHSS to both inform participants of, and direct participants in how to access, free or covered health plan offerings and resources that could further support an individual's participation and success in achieving their healthy aging goals (e.g., Silver Sneakers program, home workout kits, gym discounts, healthy food programs or discounts).

Vendor partners will be able to:

- i. Describe any and all experience working with employer health plans, including their knowledge of well-being benefits for enrollees in Medicare and non-Medicare plans.
- ii. Describe their approach to collecting community resources in the Bay Area that is geared toward the aging population.
- iii. Describe their approach to collaborating with SFHSS' health plans, including, but not limited to, developing an understanding of SFHSS' Retiree population and their benefits, establishing relationships with health plans, and/or other key strategies.

For a complete listing of the plans available to members of the Target Population, please go to <https://sfhss.org/your-benefit-plans>.¹

G. Measurement and Reporting

Tracking the progress, successes, and challenges of the Program is paramount to identifying the future of a long-term ongoing program is warranted. An ideal Program and vendor partner will:

- i. Provide regular reporting to SFHSS, by both individual cohort and aggregated across all cohorts, on self-reported participant data, including changes in behavior and documented action in the *Focus Areas and Topics of Interest* (see RFI Section III.B.) through use of pre-, mid-, and post-Program evaluation tools (see RFI Section III.A.vii.).
- ii. Provide post-Program reporting at regular intervals (see RFI Section III.A.vii.).
- iii. Provide reporting on participant graduation rates (or successful completion of all Program requirements).
- iv. Collaborate with SFHSS on customizing questions as needed.

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¹ SFHSS offers a choice of two (2) medical plans to Medicare-eligible retirees and five (5) to non-Medicare-eligible retirees.

IV. **Submitting your Response**

A . Response Deadline

Vendors must complete the Vendor Quote Form [Appendix A] and submit the form in both Microsoft Word (.docx) and Adobe PDF format, unless otherwise specified, via email to patrick.chang@sfgov.org, cc: to michael.visconti@sfgov.org, no later than **12:00 p.m. (PT) on Tuesday, August 23, 2022.**

Any attachments to the Vendor Quote Form **must not exceed ten (10) total standard (8.5x11 or equivalent) pages** in aggregate (excluding the Vendor Quote Form itself) and must be submitted with the Vendor Quote Form.

B. Questions and Clarifications

Any questions or requests for clarification must be submitted via email to patrick.chang@sfgov.org, cc: to michael.visconti@sfgov.org, no later than **12:00 p.m. (PT) on Friday, August 5, 2022.** A summary of the clarifications, questions and answers will be posted to the SFHSS website.

As a result of this RFI, SFHSS may release a request for proposals or request for bid. Failure to respond to this RFI will not preclude an entity from responding to any subsequent procurement requests nor will any response to this RFI be evaluated as a component of a subsequent request for proposals or request for bid.

V. **Minimum Qualifications**

1. Respondent is a Corporation, Limited Liability Company, or Non-Profit entity in Good Standing with the State of California (or vendor's state of formation).
2. Respondent is licensed to do business in California.
3. Respondent has reviewed and can meet the requirements for becoming an Approved City Supplier including, but not limited to, San Francisco Administrative Code Chapter 12B (<https://sfgov.org/oca/qualify-do-business>) and San Francisco Administrative Code Chapter 12X (<https://sf.gov/resource/2021/states-where-city-will-not-fund-travel-or-do-business>).

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VI. Desirable Qualifications

1. Retiree Health Promotion Experience. Three (3) or more years of experience operating or directly supporting an employee well-being program that includes promoting health for a population over 55 years of age.
2. Government or Non-Profit Experience. Experience operating or directly supporting an employee well-being program with at least one (1) government or one (1) non-profit organization within the past six (6) years.

VII. Online Demonstration

Each Respondent that timely submits a Vendor Quote Form [Appendix A], will be invited to demonstrate to SFHSS its proposed Program, via a Microsoft Teams teleconference (which SFHSS will set up), between **September 7, 2022** and **September 9, 2022** during normal business hours (8 a.m. (PT) to 5 p.m. (PT)).

Each demonstration will be limited to one (1) hour. Respondents should be prepared to demonstrate any feature(s) or related feature(s) described and/or listed in the Vendor Questionnaire, including but not limited to the Program's methods of communications and Program content strategy.

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Appendix A—Vendor Questionnaire

Request for Information (RFI) for Heathy Aging Resource Vendors, 2023 Plan Year

1. Minimum and Desirable Qualifications

a. Does your organization meet the minimum qualifications referenced in Article V [Minimum Qualifications] of this Request for Information?

Put an "X" next to
one: YES: _____ NO: _____

b. Which qualifications referenced in Article VI [Desirable Qualifications] of this Request for Information are met by your organization?

VI.a. Retiree Health Promotion Experience YES: _____ NO: _____

VI.b. Government or Non-Profit Experience YES: _____ NO: _____

2. Contact, Tax, and Vendor Information Page:

a. Company or Organization

- Name:
- Physical Address:
- Website(s):
- Federal Tax ID:
- City Supplier ID (if applicable):

b. Primary RFI Contact

- Name:
- Email:
- Telephone:

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3. Vendor Questionnaire

- a. Please describe if your Program includes the actual well-being services, or if you provide a platform that connects to various other independent programs.
- b. Please include any descriptions, definitions, statistical methodologies, and other pertinent information on the approach to evaluating participant engagement and success.
- c. Please include benchmarks and summary data on your Program's key performance indicators and objectives with a description of what types of engagement and achievement data are tracked (e.g. meetings held, surveys completed, program completions, participant satisfaction ratings, etc).

For example: *"Achieved ___% of cohort participants engaged in ___% of content"*.

- d. What data do you require the client to provide to you in order to enroll and manage the Program?
- e. Please describe your fee structure and any variables, including but not limited to: (i) Program duration, (ii) session count, (iii) cohort size and/or format (including applicable minimum cohort size), and/or (iv) participant count as well as (v) any other associated costs (e.g. customizations such as those described in RFI Sec. III.D).

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