

**SCHOOL DISTRICT OF PALM BEACH COUNTY  
PURCHASING DEPARTMENT  
3326 Forest Hill Boulevard, Suite A-323  
West Palm Beach, FL 33406-5813  
(561) 434-8216**

October 17, 2003

**ADDENDUM NO. 1**

**REQUEST FOR PROPOSAL NO. 04C-003B**

**TITLE: REQUEST FOR PROPOSAL FOR EMPLOYEE ASSISTANCE PROGRAM**

**RETURN DATE: October 29, 2003**

This addendum modifies the above listed RFP as follows:

**PAGE 8, Section 11.2**

**Now Reads:**

Provide various training sessions and workshops as requested by District staff. Examples of workshops include, but are not limited to, stress management, team building, time management, smoking cessation, managing change, transitioning into retirement, etc. These will be conducted at various locations throughout the District. Proposer shall have on staff, or retain appropriate individuals, who can prepare and present these training sessions and workshops. There shall be charge to the District or the employees for these workshops.

**Change to Read:**

Provide various training sessions and workshops as requested by District staff. Examples of workshops include, but are not limited to, stress management, team building, time management, smoking cessation, managing change, transitioning into retirement, etc. These will be conducted at various locations throughout the District. Proposer shall have on staff, or retain appropriate individuals, who can prepare and present these training sessions and workshops. There shall be **no** charge to the District or the employees for these workshops.

**PAGE 7, Section 8.9**

**Now Reads:**

**Cost of Services:** State the firm fee to provide services as required in this RFP document, including any addendum(s), on a per employee, per month (PEPM) basis. District staff will provide an employee count on a monthly basis for billing purposes. Successful proposer will absorb all the overhead for administering the Employee Assistance Program and any costs for orientation/training program, marketing campaigns (including printing costs), and all other requirements stated in the RFP.

The evaluation committee will review the costs for the two (2) plans (1a and 1b) and make a recommendation as to which is in the best interest of the District. (See Section 12.8)

- 1a) State the fee PEPM for a plan with limits of five (5) visits per issue
- 1b) State the fee PEPM for a plan that offers unlimited, short-term visits.
2. State the fee to provide career transition/outplacement services (See Section 11.12)
3. State the fee to conduct sexual harassment training (see Section 11.13)
4. State the fee for any additional professional services offered. (See Section 11.14)

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The evaluation committee will review the costs for the **three (3) plans, (1a, 1b and 1c)** and make a recommendation as to which is in the best interest of the District. (See Section 12.8)

- 1a) State the fee PEPM for a plan with limits of five (5) visits per issue
- 1b) State the fee PEPM for a plan that offers unlimited, short-term visits.
- 1c) State the fee PEPM for a plan with limits of three (3) visits per issue**
2. State the fee to provide career transition/outplacement services (See Section 11.12)
3. State the fee to conduct sexual harassment training (see Section 11.13)
4. State the fee for any additional professional services offered. (See Section 11.14)

PAGE 11, Section 12.10

**Now Reads:**

The District's current Employee Assistance Program provides unlimited, short-term counseling visits. Proposals are requested for a limit of five (5) visits per issue and for unlimited, short-term visits. Unlimited, short-term visits are defined as there being no specific number of visits per issue, as long as the client is progressing. The number of visits is determined jointly by the client and the clinician. Provide cost for unlimited, short term visits and for a limit of five (5) visits per issue.

**Change to Read:**

The District's current Employee Assistance Program provides unlimited, short-term counseling visits. Proposals are requested for a limit of five (5) visits per issue, for unlimited, short-term visits, and **for a limit of three (3) visits per issue.** Unlimited, short-term visits are defined as there being no specific number of visits per issue, as long as the client is progressing. The number of visits is determined jointly by the client and the clinician. Provide cost for unlimited, short-term visits, for a limit of five (5) visits per issue, **and for a limit of three (3) visits per issue.**

Responses to questions received from proposers are as follows:

QUESTION: Explain what you asking of the EAP in section 11.9? Is this something that is currently in practice?

ANSWER: The on-site observation is no longer required. Management training is required.

QUESTION: With regard to the latest or current contract price for the EAP services for the School District of Palm Beach County, please indicate the current or recent contract price and past two years' contract price for the EAP services provided by the existing contractor?

ANSWER: The fee per employee, per month has been \$2.15 since May 31, 1999.

QUESTION: Indicate the Per Employee Per Month rate for the past two years for the School District of Palm Beach County?

ANSWER: \$2.15

QUESTION: Please indicate the name and address of the existing EAP contractor for the School District of Palm Beach County?

ANSWER: The current provider is The Center For Family Services, 471 Spencer Drive, West Palm Beach, FL 33409.

QUESTION: Please indicate if the scope of the proposed EAP services is the same as the current EAP service contract for the School District of Palm Beach County?

ANSWER: We have required fewer services than our current contract provides.

QUESTION: Please indicate what additional or lesser services are included in the current solicitation?

ANSWER: We are not requesting any additional services. Our current contract provides unlimited short-term counseling sessions, this proposals request a cost for different plans. Under our current contract there is no fee for preparing, printing and mailing of quarterly newsletters, for providing sexual harassment training for New Employee Orientation and providing financial counseling and legal services. This Request For Proposals allows proposers to charge for these services instead of including the cost in the fee per employee per month.

QUESTION: Please indicate the approximate number of employees utilizing the EAP for counseling in the past year and the previous two years (utilization rate or percentage) and the average number of sessions provided for each employee during the past year?

ANSWER: The following data has been provided by our current vendor in response to this question:

	Number of Employees	Utilization Rate	Average # of Sessions
3/01 – 2/02	946	7.65%	5.04
3/02 – 2/03	1,082	6.7%	4.7
3/03 – 8/03	773	8.5%	N/A

Although, the average # of sessions are five (5) or less, approximately 60% of all sessions provided are in excess of six (6) sessions per individual.

QUESTION: Please include the annual number of family members accessing the EAP service and the average number of sessions provided for the family member during the past year?

ANSWER: The following data has been provided by our current vendor in response to this question:

	<u># of Family Members</u>
3/2001 – 2/2002	160
3/2002 – 2/2003	147
3/2003 – 8/2003 (6 months)	90

There is no data available for the average number of sessions for family members.

QUESTION: What percentage of the employees covered by this EAP plan are covered by other mental health service plans or union plans, which may pay for referred psychological services?

ANSWER: This is unknown, however only 1,200 employees waive medical insurance out of 19,321. Therefore, all employees on our health plan have mental and nervous disorders benefits.

QUESTION: Under Section 11.8, how may EAP Advisory Committee meetings are held annually to review utilization, discuss workshops and general services?

ANSWER: Currently meetings are held bimonthly.

QUESTION: Under Section 11.10, how many Critical Incident Stress Debriefings were held in the past two years, and what was the duration of each session?

ANSWER: There were two (2) Critical Incident Stress Debriefings with duration of four (4) hours per session.

QUESTION: Under Section 11.11, how may Fitness for Duty Evaluations were provided during the past two years?

ANSWER: March 2001 – February 2002 - 4

March 2002 – February 2003 - 4

March 2003 – August 2003 - 1

QUESTION: Under Section 11.12, approximately how many displaced employees were served in the past two years?

ANSWER: This service was not used in the past two years.

QUESTION: For budget purposes, under Section 11.13, please indicate the approximate number of sexual harassment training sessions that will be required? Also, is there a set schedule for these classes that our instructor can have to schedule their time?

ANSWER: The training is for one (1) hour twice a week, except in late July and August. During this peak hiring period sessions are held four (4) times per for approximately four (4) weeks.

QUESTION: Under Section 12.7, last two sentences; please clarify the need to have a network of counselors throughout the United States? Also, historically, how many times has this network been utilized in the past two years?

ANSWER: The network of counselors is generally used when an employee has a student at school outside of Palm Beach County, either in or out of Florida. In 2002 the services were utilized sixty (60) times, and in 2003 they have been utilized eighty-three (83) times.

QUESTION: Please send copies of any other EAP provider generated questions and responses for this solicitation?

ANSWER: This addendum contains all questions received.

QUESTION: Do you required EAP providers to have dedicated web page?

ANSWER: This is not a requirement. If your company has this capability, it should be stated and detailed in your proposal. This should be offered at no additional fee, or if there is a fee, it shall be clearly stated as this would be an optional service.

QUESTION: Confirm the proposal due date as October 29, 2003?

ANSWER: Proposals are due no later than 2:00 PM on October 29, 2003.

QUESTION: Who is your current vendor?

ANSWER: The Center For Family Services.

QUESTION: What has been you utilization rate over the past 3 yrs.?

ANSWER: Data provided by our current vendor shows the following:

Contract Year	Utilization Rate
3/01 – 2/02	7.65%
3/02 – 2/03	6.7%
3/03 – 8/03	8.5%

QUESTION: What, has been you past five year pricing history?

ANSWER: The fee has been \$2.15 per employee per month since May 31, 1999.

QUESTION: How many trainings have you had over the last year in ref. to 11.3?

ANSWER: One (1) Controlled Substance Abuse/Alcohol Misuse for supervisors  
Thirteen (13) Recovery Program meetings  
Seven (7) Management Referral meetings and consultations  
One (1) New Teacher Orientation  
Five (5) miscellaneous supervisor type meetings

QUESTION: How many EAP Advisory Committee Meetings were held last year?

ANSWER: Six.

QUESTION: How many CISD were conducted last year to date?

ANSWER: Two.

QUESTION: How many fitness for duty evaluations were conducted last year to date?

ANSWER: March 2001 – February 2002 - 4  
March 2002 – February 2003 - 4  
March 2003 – August 2003 - 1

QUESTION: How many sexual harassment training were conducted last year to date?

ANSWER: A count has not been recorded. Sessions are conducted for one (1) hour twice a week, except in late July and August. During this peak hiring period sessions are held four (4) times per for approximately four (4) weeks.

QUESTION: Under the current contract what is the utilization rate for each year?

ANSWER: Data provided by our current vendor shows the following:

Contract Year	Utilization Rate
3/01 – 2/02	7.65%
3/02 – 2/03	6.7%
3/03 – 8/03	8.5%

QUESTION: What is the per capita rate?

ANSWER: \$2.15

QUESTION: What is the number of Critical Incident Stress Debriefings conducted and the fee for each year?

ANSWER: There have been two (2) in the past two years. In our current contract, there is no separate fee for this service in our current contract.

QUESTION: What is the number of seminars, workshops, educational trainings (titles of these) conducted and what is the fee for each for each year?

ANSWER:

<u>No.</u>	<u>Workshop</u>	<u>No. Of Hours</u>
5	Managing Change	9
6	Change and Stress Management	19
15	Stress Management	28
2	Teamwork and Conflict Resolution	4
1	Interviewing Skills	2
1	Empowerment	2
1	Resume Writing	2
2	Planning for Retirement	6
1	Communication Skills	6
1	Department of Trans. Rules	2
1	Understanding ADHD	2
8	Sexual Harassment	6

These were all conducted at no additional charge to the District or employee.

QUESTION: What is the Per Employee Per Month fee for the current EAP?

ANSWER: \$2.15

QUESTION: Please provide all available usage data.

ANSWER: Data provided by our current vendor shows the following:

<u>Contract Year</u>	<u>Number of Employees</u>	<u>Utilization Rate</u>	<u>Average # of Sessions</u>
3/01 – 2/02	946	7.65%	5.04
3/02 – 2/03	1,082	6.7%	4.7
3/03 – 8/03	773	8.5%	N/A

Although, the average # of sessions are 5 or less, approximately 60% of all sessions provided are in excess of 6 sessions per individual.

QUESTION: What percent of EAP sessions provided by the current vendor were rendered by professionals licensed for independent practice by the State of Florida?

ANSWER: All services have been rendered by professionals licensed for independent practice by the State of Florida.

QUESTION: What is the average number of EAP sessions rendered by the current vendor to each client during the contract year?

ANSWER: Data provided by our current vendor shows the following:

<u>Contract Year</u>	<u>Number of Employees</u>	<u>Utilization Rate</u>	<u>Average # of Sessions</u>
3/01 – 2/02	946	7.65%	5.04
3/02 – 2/03	1,082	6.7%	4.7
3/03 – 8/03	773	8.5%	N/A

Although, the average number of sessions are five (5) or less, approximately 60% of all sessions provided are in excess of six (6) sessions per individual.

QUESTION: In what percentage of cases has “unlimited, short-term” visits exceeded 5 visits for the contract year? 8 visits? 10 visits? More than 12 visits?

ANSWER: The District has not requested data be tracked for the number of sessions provided that exceed eight (8), ten (10) or twelve (12) or more visits. The average number of sessions is five (5) or less and approximately 60% of the total number of sessions provided is in the excess of six (6) sessions per individual.

QUESTION: Please further explain what “unlimited, short-term visits” means (Section IX, Cost of Services). For example, does it mean that if an employee contacts the EAP six times during the contract year, he or she could be entitled to 30 sessions? If the client wishes to receive weekly counseling for a year, would the current EAP vendor render 52 sessions?



ANSWER: Currently our contractor provides as many counseling sessions as needed as long as the client is progressing. That is our definition of short-term, unlimited visits.

QUESTION: Why is an alternative EAP being considered at this time?

ANSWER: The District is requesting an alternative in order to reduce cost, or to determine if there is a significant enough savings if sessions are limited.

QUESTION: How many and what type of Critical Incident Stress Debriefings were provided in the last three contract years?

ANSWER: Critical Incident Stress Debriefings were provided on September 11, 2001 to an employee who lost a family member and in August for school staff who lost a teacher in the summer.

QUESTION: Please provide historical utilization information, and please include the following:  
(A) The average visit per episode for the past 3 years  
(B) The number of utilized visits for the past 3 years  
(C) The actual face-to-face utilization for the past 3 years  
(D) The average cost per visit for the past 3 years

ANSWER: The following data is available to address these questions:

	<u>Number of Employees</u>	<u>Utilization Rate</u>	<u>Average # of Sessions</u>
3/01 – 2/02	946	7.65%	5.04
3/02 – 2/03	1,082	6.7%	4.7
3/03 – 8/03	773	8.5%	N/A

Although, the average number of sessions is five (5) or less, approximately 60% of all sessions provided are in excess of six (6) sessions per individual. The fee has been \$2.15 per employee per month since May 31, 1999.

QUESTION: Please provide utilization data to include the incurred date, paid through date, and run date of the utilization data.

ANSWER: See answer above regarding number of sessions and utilization rates. In addition to this, from March 1, 2002 through February 28, 2003, nineteen (19) legal consultations, twenty-one (21) financial counseling sessions and eleven (11) self-help group sessions were provided.

QUESTION: Please describe the frequency of sexual harassment training sessions that have been delivered in the past two contract years.

ANSWER: Sessions are conducted for one (1) hour twice a week, except in late July and August. During this peak hiring period sessions are held four (4) times per for approximately four (4) weeks.

QUESTION: Please provide additional detail about the desired out-placement services requested in section 11.12 and the services currently in place. How are these services currently customized for senior executives, directors, managers, technical specialists, etc.?

ANSWER: This service has not been utilized during the current contract. The District wishes to have out-placement services under contract to be utilized if there were a number of senior executives, directors or managers released from employment. Services to be provided would include but not be limited to effective job search strategies, updating resumes, interview skills update, and other strategies or skills necessary to gain employment and cope with the loss of employment. It is the responsibility of the proposer to give specific details as to the out-placement services they can provide.

QUESTION: How many training hours were provided in the last two contract years? Which topics have been presented? How many hours should we include in our proposal on an annual basis?

ANSWER: The data below is not broken down by year. The training is provided as it is needed and is subject to change with the needs of the District.

<u>No.</u>	<u>Workshop</u>	<u>No. Of Hours</u>
5	Managing Change	9
6	Change and Stress Management	19
15	Stress Management	28
2	Teamwork and Conflict Resolution	4
1	Interviewing Skills	2
1	Empowerment	2
1	Resume Writing	2
2	Planning for Retirement	6
1	Communication Skills	6
1	Department of Trans. Rules	2
1	Understanding ADHD	2
8	Sexual Harassment	6

QUESTION: How many annual supervisor & manager training sessions should be included in our proposal on an annual basis? How many have been provided over the past two contract years?

ANSWER: In the past, we have used three (3) or four (4) per year. We cannot guarantee any specific number.

QUESTION: Please elaborate on the requirements in 11.6 regarding representing the School District as the substance abuse professional for DOT regulations. What specific services does this entail beyond performing SAP evaluations?

ANSWER: When an employee tests positive for controlled substances or positive for alcohol, they must be referred to a Substance Abuse Professional for evaluation. In addition to ensuring that the SAP is fully qualified and certified with knowledge of and clinical experience in the diagnosis and treatment of alcohol-related disorders, the EAP is responsible for the rehabilitation of those employees needing treatment. The SAP also determines the number and frequency of follow-up tests and directs the return-to-duty testing.

QUESTION: Please specify the anticipated frequency of the Employee Assistance Program Advisory Committee meetings.

ANSWER: The frequency will be determined jointly by the awarded vendor and the committee members, but will not exceed six (6) per year.

QUESTION: Please provide additional information about the on-site observations of employees suspected of substance abuse/misuse outlined in section 11.9. We are interested in knowing the current process & the frequency of these evaluations. Please specifically comment on the process for identifying employees for on-site evaluation, the process for obtaining a release of information and the process for providing feedback following the evaluation.

ANSWER: The School District must ensure that those managers/supervisors designated to determine whether reasonable suspicion exists to require an employee to undergo alcohol/drug testing receive at least 60 minutes of training on alcohol misuse and at least an additional 60 minutes of training on controlled substances use. The training must cover the physical, behavioral, speech, and performance indicators or probable alcohol misuse and use of controlled substances. The EAP is responsible for such training. As a result, the EAP should be fully versed on the process for identifying employees suspected of drug use or alcohol misuse.

QUESTION: Please define "clinical staff" as outlined in section 12.1. Does this contemplate a network- based service model?

ANSWER: Clinical staff refers to all therapists who will provide counseling services for the District account as well as the staff of the awarded vendor who provide training and workshops.

QUESTION: What was the average number of enrollees, members, and the average contract size (ACS) for the past three years?

ANSWER: There has been an average of 18,000 employees per year.

QUESTION: Currently the School District of Palm Beach County employs 19,612 employees. Please confirm that the entire population is eligible for the EAP program? If not, please provide the estimated number of EAP enrollees.

ANSWER: Currently 19,321 employees are eligible. All except part-time employees working less than four hours a day are eligible.

QUESTION: Do any School District employees currently act as internal EAPs or make any referrals into the existing EAP program? If so, please describe their role & current interface.

ANSWER: No District staff acts as an internal EAP. Directors may make referrals for "Fit For Duty" evaluations or counseling services.

QUESTION: Please provide the rate history for the incumbent EAP for the past three years.

ANSWER: The rate has been \$2.15 per employee per month since May 31, 1999.

QUESTION: How long has the current EAP plan design been in place?

ANSWER: The current plan has been in place since May 31, 1999.

QUESTION: Please verify that a fully insured rate is being requested.

ANSWER: Yes.

QUESTION: Does the School District of Palm Beach County's current EAP vendor provide home mailings? Please describe the contents and how often these materials are distributed to the employees.

ANSWER: The current vendor prepares and mails a newsletter to employees' home on a quarterly schedule.

QUESTION: What kinds of communication materials does the School District of Palm Beach County expect to be included in our EAP quote?

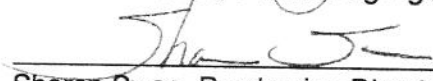
ANSWER: Examples include, brochures for new employees and literature to communicate to all employees who the contract awarded provider is, how to schedule appointments, and other information to promote the services for the employee assistance program.

QUESTION: How many fitness for duty evaluations were conducted over the past three years of the contract?

ANSWER: Four (4) were conducted each year for the past two (2) years.

This addendum is for information only and need not be returned with your RFP. By virtue of signing the Request for Proposal, bidder agrees to this addendum.

  
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Karen L. Brazier, Purchasing Agent

  
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Sharon Swann, Purchasing Director