

City of Long Beach

Request for Proposals RFP - HR-26-755
Health Advocacy & Navigation Services





Please read this entire document carefully as it contains important information essential to your proposal

Overview

Summary

The City of Long Beach is seeking proposals from qualified firms to provide health advocacy and navigation services to benefit eligible employees, retirees, and their family members. The services may include, but are not limited to, care coordination, physician locator, claims assistance, fee negotiation, and grievance advice.

Key Dates

Release Date: Tuesday, September 22, 2026

Questions Due to the City: 11:00 AM (PST), Tuesday, October 06, 2026

Proposals Due: 11:00 AM (PST), Wednesday, November 04, 2026

The City reserves the right to modify these dates at any time, with appropriate notice to prospective Contractors.

Proposal Information

Instructions for what to include in your proposal and how to submit it are detailed in Section 4.

Proposals must be submitted electronically via LongBeachBuys.com.

This is a competitive process, and the City intends to award the opportunity based on the information submitted in the proposal that best meets the needs of the City.

Official Contact

Keisha Sanker

rfppurchasing@longbeach.gov

All communication with the City related to this RFP must be directed to the contact listed above.

Assistance & Resources

For assistance using [Long Beach Buys](#), please contact us directly

Customer Service Form
rfppurchasing@longbeach.gov
(562) 570-6200

Additional support available for small businesses in Long Beach

BizCare

[BizCare](#) staff connect business owners and nonprofit leaders to important resources and information, such as grants, loans, technical assistance, information on City policies, and more.

562-570-4BIZ (4249)
4Biz@longbeach.gov
[Request Assistance Form](#)

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1 The Opportunity

1.1 Project Summary

The City of Long Beach (City) is seeking proposals from qualified firms to provide health advocacy and navigation services to benefit eligible employees, retirees, and their family members. Family members include the City's defined eligible dependents in addition to parents, and mothers and fathers-in-law. The services may include, but are not limited to, care coordination, physician locator, claims assistance, fee negotiation, and grievance advice.

1.2 Background

The City is the seventh largest city in California and employs approximately 6,500 full-time and part-time personnel throughout 23 departments. The Employee Benefits Division, housed in the City's Human Resources Department, oversees the implementation, monitoring, and compliance of 20+ benefit contracts that offer competitive and comprehensive benefits to City employees, retirees, and their dependents. In addition to the administration of benefit plans, staff in the Employee Benefits Division provide the following services:

- Benefits-related training to departmental staff
- Unemployment claims processing
- Citywide Benefit Education program
- Oversight/coordination of retirement counseling

Currently, there are approximately 4,942 benefit eligible active employees and 1,609 early retirees and Medicare retirees enrolled in the City's retiree benefit plans (not including dependents). The City currently contracts with Health Advocate to provide Health Advocacy and Navigation services to eligible employees and retirees.

The City defines eligibility for active employees as permanent, full-time and permanent, part-time employees along with seasonal, part-time employees who meet the American Care Act (ACA) eligibility. Furthermore, retirees are eligible for the Health Advocacy and Navigation service if they continue benefit coverage through retirement with the City. In addition to City employees and retirees, the current contract covers employees and their eligible spouses, dependents, parents, and mothers and fathers in law.

City of Long Beach's Benefits Plans

The City is committed to providing comprehensive, high quality, and cost-effective benefit plans and programs that provide optimum value to the City, its employees, retirees, and their dependents.

The City pays into Social Security for most employees with some exceptions in safety classifications. The City does not pay into State Disability and instead provides benefits through The Standard Insurance.

The City offers the following core plan under its Benefits Package:

Active Population

- **Medical**
 - Fully Insured HMO Premier Plan – Anthem Blue Cross
 - Self-Funded PPO Plan – Anthem Blue Cross
- **PPO Surgery Benefit**
 - Self-Funded PPO Surgery Benefit – Carrum Health
- **Pharmacy Benefits Management (PBM)**
 - CVS Caremark is the pharmacy benefits provider on the Anthem Blue Cross HMO and PPO plans.
- **Dental**
 - Fully Insured HMO Plan – DeltaCare USA
 - Self-Funded PPO Plan – Delta Dental
- **Vision**
 - Self-Funded Vision Plan – Vision Service Plan (VSP)
- **Employer-Paid Life Insurance**
 - Fully Insured \$20,000 Basic Life – The Standard
 - Fully Insured \$20,000 Accidental Death and Dismemberment – The Standard
 - Fully Insured Additional Life per MOU – The Standard
- **Employer-Paid Short-Term Disability**
 - Fully Insured Short-Term Disability – The Standard
- **Employer-Paid Long-Term Disability**
 - Fully Insured Long-Term Disability – The Standard

In addition to the core benefits listed above, the City offers the following voluntary benefits: The Standard Voluntary Life Insurance, MissionSquare Deferred Compensation

457(b), MetLife Pet Insurance, Wellhub Gym and Wellness App, and ScholarShare529 College Savings Plan.

The following ancillary benefits are offered to City employees: LifeBalance Employee Discount Program, Alliant Medicare Solutions Medicare Navigation Assistance, and Health Advocate Employee Assistance Program (EAP).

The following benefits are offered to specific bargaining units who have negotiated the benefit: The Standard Short-Term Disability Buy-up, The Standard Long-Term Disability Buy-up, MissionSquare Deferred Compensation 401(a), and MissionSquare Retired Health Savings Plan.

In terms of retirement pension, the City offers a defined benefit retirement plan under the California Public Employees' Retirement System (CalPERS). Employees who are not eligible for CalPERS are enrolled in the Public Agency Retirement System (PARS), a defined benefit multiple employer program.

Retiree Population

Health Plans offered to retirees are separated into two categories: non-Medicare plans and Medicare plans.

- **Non-Medicare Retiree Medical Plans**
 - Fully Insured HMO Premier Plan – Anthem Blue Cross
 - Fully Insured HMO Classic Plan – Anthem Blue Cross
 - Self-Funded PPO Plan – Anthem Blue Cross
- **Medicare Eligible Retiree Medical Plans**
 - Self-Funded Medicare Supplement PPO Plan – Anthem Blue Cross
 - Fully Insured Medicare Advantage PPO Plan – United HealthCare (UHC)
 - Fully Insured Medicare Advantage HMO Plan – SCAN
- **Dental**
 - Fully Insured HMO Plan – DeltaCare USA
 - Self-Funded PPO Plan – Delta Dental
- **Vision**
 - Fully-Insured Vision Plan – Vision Service Plan (VSP)
 - Self-Funded Vision Plan – Vision Service Plan (VSP)

1.3 Goals

This RFP has the following stated goals:

- Maintain current service level outlined in Section 2.1, Description of Services.
- Enhance member understanding and utilization of existing health benefits.
- Improve care navigation and coordination across multiple services for members.

1.4 Award Terms

This contract will be for a period of two years with the option to renew for three additional one-year periods. The total contract term will not exceed five years.

2 Scope of Work

2.1 Description of Services

The City is seeking to partner with a single firm to provide health advocacy and navigation services that will complement the City's existing carriers and Third Party Administrator (TPA) care management, advocacy, and engagement services. The awarded firm shall act as an integrator of all of the City's existing benefits services to assist eligible employees and their family members in understanding their benefits as well as accessing the right services or resources for their healthcare needs.

Services included in the scope are listed below but are not limited to: personal health advocacy, medical and administrative support, care coordination, claims assistance, fee negotiations, grievance advice, pharmacy support, physician locating assistance, complex medical care assistance and navigation, and integrated call management.

Below are the tasks and responsibilities associated with each service category:

General Administrative Requirements

- Ability to comply with the Freedom of Information Act (FOIA) throughout the bidding process.
- Capability to integrate the following data types provided by the City, its service providers, and/or self-reported by individual members during implementation and at mutually agreed upon frequencies over the duration of the contract such as:
 - Eligibility data
 - Claims data
 - Member data, including Personal Identifiable Information (PII) and Protected Health Information (PHI)
 - Changes to the City's health benefits providers or plan designs

- Provider data from the City's health plans, plan administrators, pharmacy benefits manager, or other third-parties
- Ability to integrate all of the benefit plans and programs across the City's entire benefit ecosystem to guide employees toward the most appropriate resources or services for their needs.
- Retain plan information for the current year, and from three years prior, to provide employees with accurate information including any plan changes or updates that may have occurred over time.
- During the contract term, the City will have no data restrictions and may obtain and share data with any third party.
- During the contract term, the City will retain control over plan design modifications, employee contribution methodology, and changes during the contract term except for state and federal required changes where applicable.
- Upon termination, send data and all relevant transfer files in a timely manner to the City's new vendor at no additional cost. Relevant data will include, but is not limited to, information on eligibility, claims history and any other pertinent information.
- Ensure full compliance with HIPAA and HITECH regulations regarding the security of protected health information.
- Protect the privacy and confidentiality of member personal and medical information by abiding by all applicable laws and regulations.
- Notify the City as soon as possible, and within ten (10) business days, upon the discovery of any unauthorized use or disclosure of confidential client and/or member information by the selected firm or any third-party.
- Ability to send and receive eligibility data electronically.
- Maintain full and accurate records with respect to all matters and services to the City for the entire duration of the contract and after contract termination or non-renewal.

Health Advocacy and Navigation

Provide dedicated health advocates to assist members with:

- Coordinating care among multiple physicians or medical institutions.
- Resolving billing issues and claims disputes.
- Negotiating fees with healthcare providers when necessary.

- Filing appeals or grievances with their health insurer or health plan administrator with the understanding that submissions are determined with the expressed consent of the employee/member.
- Understanding their coverage options and other employer-paid benefits.
- Navigating prescription drug issues, including formulary or benefit questions.
- Identifying top medical institutions, specialized programs, and providers, as well as providing appointment scheduling assistance, for complex medical care.
- Understanding their medical test results, diagnoses, or treatment options.
- Locating in-network providers and scheduling appointments.
- Locating, reviewing, and arranging services with third-party vendors for services that are beyond the typical scope of healthcare benefits, such as transportation to and from medical appointments.

Member Communications and Engagement

- Provide members with a secure, ADA-compliant online platform and mobile application to connect with health advocates as well as access benefits information and resources.
- Provide members with the option to receive reminders and recommendations for preventive services, chronic condition management strategies, and identified gaps in care.
- Guarantee the online platform maintains at least 99% availability.
- Ensure 24/7 customer intake services with next-business-day follow-up available.
- Deliver culturally competent and inclusive services, including the availability of multi-lingual speaking representatives.
- Ability to support various member communication and engagement methods including, but not limited to, phone support, email, direct mailings, text messages, and push notifications.
- Participate in the City's open enrollment Benefits Fair and other events or meetings as needed.
- Provide customized support or communication materials according to the City's specific needs and preferences.

Account Service Support

- Assign a highly experienced, dedicated, and accessible account management team to the City.
- Identify the physical locations of all primary account team members, including where they work day-to-day (e.g., onsite, regional office, headquarters, remote).
- Provide the professional qualifications, certifications, relevant experience, and roles of each team member assigned to support the City. Include tenure with the organization, areas of specialization, and healthcare advocacy or navigation-specific expertise.
- Ensure that at least one live account service team member will be available to the City between the hours of 8am and 5pm Pacific Time, Monday to Friday.
- Attend quarterly meetings with the City of Long Beach Human Resources staff, one annual in-person meeting with the City's Health Insurance Advisory Committee, and ad hoc meetings as needed to discuss utilization, updates, and strategic initiatives related to the City's objectives.
- Provide timely notification of any newly launched or updated online platforms and dashboards available to the City of Long Beach Human Resources staff, and provide training on the platforms as needed.

Reporting and Analytics

- Provide the City with standard management and utilization reports as well as non-standard or ad hoc reports upon request.
- Provide the City with access to a real-time client dashboard of aggregate data, insights, and comparative benchmarks related to cost, utilization, engagement, etc.

Audit Requirements

- Allow the City or its third-party representative (not subject to approval by the vendor) to access and audit all claims, utilization data, performance guarantee provisions, contracts, administrative fees, and other information relevant to account services at no additional cost. The City will cover any associated charges from the selected auditor.
- Inform the City of any and all aspects of the proposed services that cannot be included in the audit.

- Ensure that all aspects of claims transacted for the City by the selected firm are subject to audit even if the firm deems the information to be confidential in nature, subject to a signed confidentiality agreement.
- Grant the City the right to audit records in any one given contract year for the entire term of the contract and up to one-year post-termination.
- Conduct periodic audits as part of the course of business. Provide the City with copies of any internal audits or quality assurance reports.

Exhibits
Exhibit 1_2026 COLB Actives Benefit Guide
Exhibit 2_2026 COLB Life and Disability Benefit Guide
Exhibit 3_2026 Non Permanent Benefit Guide
Exhibit 4_2026 COLB Retirees Benefit Guide

2.2 Performance Metrics & Contract Management

2.2.1 Performance Metrics

The table below highlights the targets that will be tracked and reviewed collaboratively with the Awarded Contractor during the contract. This list is an indication of the performance metrics of interest to the City, and is not exhaustive or final. As a part of a response to this RFP, Proposers may propose additional or alternative performance metrics to be tracked on a regular basis. The final set of performance metrics and frequency of collection will be negotiated by the successful Proposer and the City prior to the finalization of an agreement between parties, and may be adjusted over time as needed.

METRIC	DESCRIPTION	TARGET	DATA SOURCE
1. Implementation timeline	Total duration of contract implementation, including initial file and data transfer	Implementation complete within 60-90 days	To be determined during implementation
2. Account management satisfaction	Overall satisfaction with account team, reporting, and issue resolution	To be determined during implementation	To be determined during implementation

3. Meeting attendance and preparation	Attendance and preparation of materials for required meetings	To be determined during implementation	Task Log for Projects
4. Online platform availability	Availability and functionality of website and mobile application	Online platform available and functional at least 99% of the time	To be determined during implementation
5. Member digital engagement	Percentage of active members registered on the online platform	11% or higher	To be determined during implementation

2.2.2 Contract Management

The awarded firm will receive consistent support and communications from a designated City liaison through the duration of the contract. The liaison will serve as the primary contact for the awarded firm. The City's designated liaison will send out reminders for upcoming deadlines for reports, invoices, and narrative metrics. These efforts aim to provide clarity and address any questions or concerns to ensure that any issues can be openly shared and resolved in a timely manner.

Kick Off Meeting

The awarded firm is required to participate in a project kickoff meeting, which will include the introduction of key project staff, a review of the project scope and timelines, an overview of the awarded firm's invoicing and reporting requirements, and the establishment of a regular schedule for project meetings and reporting.

Milestones and Deliverables

The awarded firm shall submit the following deliverables to City staff by the designated deadline and receive approval before implementation. Final deadlines shall be negotiated and agreed upon during contract negotiations.

- Comprehensive report outlining the integration process, including timelines, milestones, and resource requirements to ensure readiness for the March 1, 2027, go-live date.
- Detailed outline of all implementation processes, project plans, data/file specifications, data sharing delivery timelines, and other testing/go-live support.

- Detailed plan outlining strategies and procedures to maintain service delivery of scope of work.

Communications and Reporting

The awarded firm and City liaison shall meet regularly during the start of the engagement to review project status, address project issues, assess opportunities to improve effectiveness and efficiency. After the go-live date, the awarded firm and City staff shall meet quarterly to review project status and performance, address issues, assess opportunities to improve effectiveness and efficiency, and review service data and monitor performance.

2.2.3 Contract Payment

The City issues payment based upon services rendered. After a contract is finalized and work is performed, the Contractor should invoice the City. The City will remit payment within 30 calendar days of being billed.

3 How We Choose

3.1 Minimum Qualifications

Proposers must meet the following mandatory requirements to be eligible:

- Qualification to conduct business in the City.
- Not having been debarred by federal, state, or local government.
- Must possess all trade, professional, or business licenses as may be required by the work contemplated by this RFP.
- At least five (5) years of consecutive, verifiable experience providing health advocacy and navigation services for other large-scale government entities, municipalities, or public sector clients.
- Ability to keep records in accordance with any federal, state, or local mandates and document retention standards.
- Verifiable HIPAA-compliant practices and secure data management regarding the handling and transmission of PHI and PII.
- Attest that key personnel will be available to the extent proposed for the duration of the engagement, and acknowledge that no person designated as key personnel shall be removed or replaced without prior written notice and discussion with the City.
- Ability to provide the most recent Audited Financial Statement or Corporate Annual Report and Business Tax Return.

- Indication of the number and description of any outstanding legal actions pending against the firm's organization with an explanation of how the firm will ensure that these actions will not disrupt business operations.

3.2 Evaluation Criteria

Proposals shall be consistently evaluated based upon the following criteria:

CRITERIA	Weight
1. Organizational Capacity & Experience • Demonstrated experience providing the services described in this RFP to similar clients • Availability of skilled personnel with relevant administration and management experience in benefits education, care coordination, and claims resolution • Evidence of strong organizational infrastructure and resources to support this project	30%
2. Method of Approach • Demonstrated ability to maintain the scope of work (Note that for scoring and evaluation purposes, submitted proposals should be based solely on the City's current plan design as outlined in Section 2.1 Description of Services). • Detailed description of proposed methodology for integrating with existing systems and processes • Demonstrated capability to ensure a March 1, 2027 go-live date • Clear plan for addressing potential challenges or obstacles and implementing proactive risk mitigation measures	40%
3. Communications & Reporting • Ability to participate in mandatory meetings • Demonstrated ability and experience in data collection and reporting • Comprehensive communication plan outlining regular updates, channels of communication, and escalation procedures • Commitment to responsiveness and transparency in addressing City inquiries, feedback, and concerns throughout the contract term	20%
4. Reasonableness of Cost	10%

4 Proposal Instructions & Content

4.1 Timelines & Instructions

MILESTONE	TIME (PACIFIC) & DATE	LOCATION / ADDITIONAL INFORMATION
Release date	Tuesday September 22, 2026	
Questions due to the City	11:00 AM (PST), Tuesday, October 06, 2026	• Submit all inquiries via email to rfppurchasing@longbeach.gov
Posting of the Q&A	Tuesday, October 20, 2026	• Responses to the questions will be posted on LongBeachBuys.com.
Proposals due	11:00 AM (PST), Wednesday November 04, 2026	• Proposals should be submitted electronically via LongBeachBuys.com. • Late proposals, or proposals submitted through other channels will not be accepted. • Proposers are responsible for submitting their proposals completely and on time. ○ Proposers will receive an e-bid confirmation number with a time stamp from LongBeachBuys.com indicating that the proposal was submitted successfully. The City will only receive proposals that were transmitted successfully. ○ For technical support, email or call the City during normal business hours at LBPurchasing@longbeach.gov or (562) 570-6200.

Evaluation of Narrative & Cost Proposals	November - December 2026	- An Evaluation Committee will review Narrative & Cost Proposals to select the proposal that best meets the needs of the City. - Evaluations will be conducted using a methodology derived from the evaluation criteria listed in Section 3.2.
Interviews/ Demos	December 2026	The City may interview or request demos from none, one, some or all Proposers.
Negotiation & Contractor Selection	January - February 2027	- Selected Contractor(s) will be notified in writing. - Any award is contingent upon the successful negotiation of final contract terms. If contract negotiations cannot be concluded successfully, the City reserves the right to negotiate a contract with another Contractor or withdraw the RFP. - Negotiations shall be confidential and not subject to disclosure to Public Records Act requests unless and until an agreement is reached.
Estimated Contract Execution	March 1, 2027	
Proposer Debrief	After Contractor is Selected	Successful and unsuccessful Proposers are encouraged to request phone call or in person meeting with the City to discuss the strengths and weaknesses of their proposal. The intent of the debrief is to provide the Proposer with constructive feedback to equip them with information to effectively meet the City's needs and be successful in future proposals.

4.2 Proposal Content

Complete proposals will include the following. Proposers are encouraged to use this table as a checklist to ensure all components are included in their proposal. **Please note proposals that are NOT complete will NOT be considered for the opportunity and will be deemed nonresponsive.**

PROPOSAL	
☐ Narrative Proposal	The Narrative Proposal should be prepared using the provided template (4.3 Narrative Proposal Template). Proposers should provide a straightforward, concise delineation of capabilities to satisfy the RFP. Guidance on preparing a Narrative Proposal is detailed in Section 4.3. • The Narrative Proposal must be named the following: “Attachment #1_Narrative Proposal_Name of Firm.”
☐ Cost Proposal	The Cost Proposal should provide a straightforward cost proposal. Proposers may use their preferred format. • The Cost Proposal must be named the following: “Attachment #2_Cost Proposal_Name of Firm”. Include in the Cost Proposal, • Any possible limitations of fee negotiations. Proposals should list whether they will “attempt” negotiations” or guarantee a target percentage of savings, • List of services that may fall outside of the scope or offer services at an additional cost, • Confirm whether custom material is included in base/standard fee or if there is an additional cost.
PROPOSAL APPENDICES	
☐ Financial Stability	Proposers should include one or more of the following financial statements to provide the City with enough information to determine financial stability of the Proposer and subcontractor. • Most Recent Audited Financial Statement or Corporate Annual Report • Business tax return • Statement of income and balance sheet
☐ Implementation Timeline	Proposers should provide an implementation timeline with milestones and estimated City staff time usage.
☐ Sample Reporting	Proposers should include sample reporting that demonstrates their capabilities.

☐	Other Addenda (if applicable)	Colored displays, promotional materials, and other collateral are not necessary or desired. However, if a complete response cannot be provided without referencing supporting documentation, it may be provided as an addendum clearly cited in the Narrative or Cost Proposal.
MANDATORY ATTACHMENTS <i>The following are included as Attachments in Long Beach Buys. They must be signed by the individual legally authorized to bind the Proposer.</i>		
☐	A. Authorization & Certification	
☐	B. Equal Benefits Ordinance (EBO) Form	
Attachments Which May be Submitted Upon Award <i>Upon award, Awarded Contractors will be required to submit the following. We encourage you to take note of these requirements, and where possible, include available information as part of your proposal to expedite processing.</i>		
☐	C. W-9	
☐	D. Business License	
☐	E. Proof of Registration with the California Secretary of State	
☐	F. Certificates of Insurance: [Refer to Section 5.3]	
☐	Contact Information <i>Ensure your organization's profile is up to date in Long Beach Buys, including an email address, phone number, and for any classifications you may qualify for.</i>	
☐	Conformation of Attachments <i>Ensure you have checked ALL the attachments in Long Beach Buys and have confirmed that all the required documents have been uploaded and labeled correctly.</i>	

4.3 Narrative Proposal Template

An editable version of the template below has been posted to *Long Beach Buys*. Proposers are required to use this editable template and submit it as their narrative proposal. Proposers may submit other attachments as supporting documentation.

Confidential and/or Proprietary Information

Any information that a Proposer believes may be considered proprietary, confidential, or a trade secret should be labeled with term CONFIDENTIAL on that part of the proposal. All proposals and parts of the proposals which are not marked as confidential will be automatically considered public information after the Notice of Intent to Award has been posted and the protest period has been closed. The City will comply with the Proposer's

request to withhold the requested confidential information to the extent allowed by the Public Information Act.

Organizational Capacity & Experience

PROPOSER CONTACT INFORMATION		
Organization	Company Name	
	Company Address	
	Federal Tax ID Number	
	Website	
Authorized Representative	Name	
	Title	
	Email Address	
	Phone Number	
Other Point of Contact (if required)	Name	
	Title	
	Email Address	
	Phone Number	
PROPOSER CAPACITY & EXPERIENCE		
What type of enterprise is the organization?	☐ Non-Profit	
	☐ Sole Proprietorship	
	☐ General Partnership	
	☐ Corporation <i>State and Date of incorporation:</i> _____	
	☐ Limited Liability Company	
	☐ Other _____	
Briefly describe your organization's background, culture, and mission statement.		
What other names, if any, has your organization operated under?		
Describe why your organization is qualified to provide the services described in this RFP (1-2 paragraphs)		

Describe the length of time your organization has been providing the services described in this RFP (1-3 sentences)	
Describe your success with similar clients and explain where your organization value stands out compared to other services providers.	
Provide a plan of overview for how the project will be staffed, including the percentage of time each employee will be allocated to the project and their titles, qualifications, and number of years with the organization.	
Describe the backup support plan to ensure continuity of service in the event primary account team members are on leave, reassigned, or otherwise unavailable Include how responsibilities transition during coverage periods.	
Where are the representative(s) that would service the City's account located?	
How is your client team structured?	
What is your staff retention rate?	
Are there any outstanding legal actions pending against your organization? If yes, explain the nature and current status of the action(s). Additionally, explain how your organization will ensure any outstanding actions will not disrupt it's ability to provide services to the City.	
Has your organization experienced a recent merger or acquisition activity within the last 24 months? If yes, please explain.	
Does your organization anticipate any restructuring or reorganization in the next two years (e.g., major staff changes or office relocations or closings). If yes, please explain the anticipated changes and how they would impact business with the City.	

Has your organization ever filed for bankruptcy? If yes, when, and what is the current status of your filing?		
Has your organization had a contract terminated for cause or non-renewed within the last five (5) years? If yes, by whom and for what circumstances? Provide the name and telephone number of any clients that have terminated your organization for cause in the last five (5) years.		
REFERENCES		
Reference 1	Company	
	Project Manager	
	Phone Number	
	Project Description	
	Project Start and End Dates	
Reference 2	Company	
	Project Manager	
	Phone Number	
	Project Description	
	Project Start and End Dates	
Reference 3	Company	
	Project Manager	
	Phone Number	
	Project Description	
	Project Start and End Dates	

SUB-CONTRACTOR CONTACT INFORMATION		
Does the proposal include subcontractors?	☐ Yes	
	☐ No	
If applicable, provide the following for all subcontractors included in this proposal.		
Organization	Company Name	
	Company Address	

Authorized Representative	Name	
	Title	
	Email Address	
	Phone Number	
Other Point of Contact (if required)	Name	
	Title	
	Email Address	
	Phone Number	
SUBCONTRACTOR CAPACITY & EXPERIENCE		
What type of enterprise is the organization?	☐ Non-Profit	
	☐ Sole Proprietorship	
	☐ General Partnership	
	☐ Corporation <i>State and Date of incorporation:</i> _____	
	☐ Limited Liability Company	
	☐ Other _____	
Which specific requirements of this RFP will the subcontractor perform?		
Is the subcontractor registered with the California Department of Industrial Relations? If yes, provide registration number.		
Please describe why the organization is qualified to provide the services described in this RFP (1-2 paragraphs).		
Please describe the length of time the organization has been providing the services described in this RFP (1-3 sentences).		
How many employees does the organization have nationally, locally, and residing in Long Beach?		
Where are the representative(s) that would service the City's account located?		

Method of Approach

1. Provide an executive summary. It should demonstrate a clear understanding of the scope of work and describe how your organization will fulfill the requirements outlined Section 2 Scope of Work.
2. Describe your organization's approach to assisting members in accessing the appropriate information or care to meet their needs. Which issues can your organization directly help members resolve, and which issues can your organization only advise members on and/or refer them back to the carrier, provider, or employer? Describe the typical procedures when health advocates are unable to resolve a member's inquiry
3. Describe the qualifications, experience, tenure, and skill sets of your organizations health advocates.
4. Will the advocate assigned to an individual remain the same until the individual's current issue is resolved? Will the same advocate also handle future inquiries with the same individual?
5. What is the average staffing ratio of health advocates to enrolled members?
6. Describe your best practices for driving engagement.
7. Describe your organizations approach to adhering to accessibility standards, ensuring website and mobile application usability for people with visual, hearing, motor, or other disabilities. Provide a link to a public website designed and developed for your firm that demonstrates the described manner of accessibility compliance.
8. What health plan data do you need to operate effectively? What is the frequency required for each data set? What is the typical time frame from receipt of such data to it being loaded and available in your system? What can you do with eligibility-only data?
9. Describe your data security standards and procedures regarding HIPAA compliance and the handling of PHI during and after the contract term. Additionally, detail your notification procedures and risk mitigation plan in the event of a breach of confidential or sensitive data.

10. Describe your organization's current or anticipated use of emerging solutions and technologies in the delivery of its services (e.g., artificial intelligence [AI], machine learning, natural language processing, social determinants of health). If your organization uses AI, describe the specific functions performed by AI, how they improve member experience, and any related data protection measures. Note if clients and/or members can opt in or out of features that use AI.
11. Based on the City's likely needs and your organization's proposed implementation plan, identify three potential risks or challenges to implementation. Describe your mitigation strategy to prevent, monitor, and resolve each potential issue.
12. What would your organization need from the City to implement the contract successfully?

Communications & Reporting

1. Describe how your organization will proactively share standard and non-standard reporting and utilization reports with the City. Provide a list of available standard reports, describe the typical reporting frequency with similar clients, and outline the process for requesting customized reports.
2. Provide a detailed escalation process for service issues, complex member cases, data concerns, or operational challenges. Identify response-time expectations, and how escalations are documented, tracked, and resolved.
3. Describe how your organization measures and reports on engagement, identified gaps in care, clinical outcomes, and/or financial outcomes.
4. Describe your organization's approach to regularly reviewing reporting and dashboard data with the City to help proactively support employee well-being and reduce costs. How have you helped similar clients intentionally use data related to case volume, issue type, chronic conditions, recurring carrier issues, and other trends?
5. Does your organization provide real-time client dashboards? If yes, what trend data would the City be able to access from the dashboard? Please provide a guest login or examples of reporting available via the client dashboard.

6. Describe your organization's approach to enhancing member communication, including how you identified and shared opportunities for improved member engagement with similar clients. Include information of the employee opt-out process for focused communication.
7. The City requires that the Awarded Contractor provide proof of payment of any subcontractors used for this project. If the proposal includes subcontractors, please describe the plan for how the City will be notified of such payments.

5 Terms & Conditions

5.1 Acronyms/Definitions

1. ADA: American with Disabilities Act
2. Awarded Contractor: The organization/individual that is awarded a contract with the City of Long Beach, California for the services identified in this RFP.
3. City: The City of Long Beach and any department or agency identified herein.
4. Contractor / Proposer: Organization/individual submitting a proposal in response to this RFP.
5. Department / Division: City of Long Beach, Human Resources
6. Evaluation Committee: An independent committee comprised solely of representatives of the City established to review proposals submitted in response to the RFP, evaluate the proposals, and select a Contractor.
7. FOIA: Freedom of Information Act
8. HIPAA: Health Insurance Portability and Accountability Act
9. HITECH: Health Information Technology for Economic and Clinical Health
10. May: Indicates something that is not mandatory but permissible.
11. PHI: Protected Health Information
12. PII: Personal Identifiable Information
13. RFP: Request for Proposals.
14. Shall / Must: Indicates a mandatory requirement. Failure to meet a mandatory requirement will result in the rejection of a proposal as non-responsive.
15. Should: Indicates something that is recommended but not mandatory. If the Proposer fails to provide recommended information, the City may, at its sole option, ask the Proposer to provide the information or evaluate the proposal without the information.
16. Subcontractor: Third party not directly employed by the Proposer who will provide services identified in this RFP.
17. TPA: Third-Party Administrator

5.2 Solicitation Terms & Conditions

1. The City reserves the right to alter, amend, or modify any provisions of this RFP, or to withdraw this RFP, at any time prior to the award of a contract pursuant hereto, if it is in the best interest of the City to do so.
2. The City reserves the right to request clarification of any proposal term from Proposers.
3. The City may contact the references provided; contact any Proposer to clarify any response; contact any current users of a Proposer's services; solicit information from any available source concerning any aspect of a proposal; and seek and review any other information deemed pertinent to the evaluation process.
4. The level and term of documentation required from the Proposer to satisfy the City will be commensurate with the size and complexity of the contract and Proposers should submit accordingly. If the information submitted by the Proposer, or available from other sources, is insufficient to satisfy the City as to the Proposer's contractual responsibility, the City may request additional information from the Proposer or may deem the proposal non-responsive.
5. The City reserves the right to waive informalities and minor irregularities in proposals received.
6. The City reserves the right to reject any or all proposals received prior to contract award.
7. The City's determination of the Proposer's responsibility, for the purposes of this RFP, shall be final.
8. Unless otherwise specified, the City prefers to award to a single Contractor but reserves the right to award contracts to multiple contractors.
9. The City shall not be obligated to accept the lowest priced proposal, but will make an award in the best interests of the City of Long Beach after all factors have been evaluated.
10. If the City receives a single responsive, responsible proposal, the City may request an extension of the proposal acceptance period and/or conduct a price or cost analysis on such proposal. The Proposer shall promptly provide all cost or pricing data, documentation and explanation requested by the City to assist such analysis. By

conducting such analysis, the City shall not be obligated to accept the single proposal. The City reserves the right to reject such proposal or any portion thereof.

11. Any irregularities or lack of clarity in the RFP should be brought to the Purchasing Division designee's attention as soon as possible so that corrective addenda may be furnished to Proposers.
12. Proposals must include any and all proposed terms and conditions, including, without limitation, written warranties, maintenance/service agreements, license agreements, lease purchase agreements and the Proposer's standard contract language. The omission of these documents may render a proposal non-responsive.
13. Alterations, modifications or variations to a proposal may not be considered unless authorized by the RFP or by addendum or amendment.
14. Proposals which appear unrealistic in the terms of technical commitments, lack of technical competence, or are indicative of failure to comprehend the complexity and risk of this contract, may be rejected.
15. Proposals may be withdrawn by written notice received prior to the proposal opening time.
16. The price and amount of this proposal must have been arrived at independently and without consultation, communication, agreement or disclosure with or to any other Contractor or prospective Contractor.
17. No attempt may be made at any time to induce any firm or person to refrain from submitting a proposal or to submit any intentionally high or noncompetitive proposal. All proposals must be made in good faith and without collusion.
18. Prices offered by Proposers in their proposals are an irrevocable offer for the term of the contract and any contract extensions. The Awarded Contractor agrees to provide the purchased services at the costs, rates and fees as set forth in their proposal in response to this RFP. No other costs, rates or fees shall be payable to the Awarded Contractor for implementation of their proposal.
19. The City is not liable for any costs incurred by Proposers prior to entering into a formal contract. Costs of developing the proposals or any other such expenses incurred by the Proposer in responding to the RFP, are entirely the responsibility of the Proposer, and shall not be reimbursed in any manner by the City.

20. In the event a Proposer received assistance from City staff or a representative of the City (technical assistance provider), the City is not responsible for any mistakes, inaccuracies, delays, or any other impact that the assistance provided did to impact the Proposer's final product. Available technical assistance support services are only intended to provide advice and does not constitute a basis for any protest to this contract opportunity. It is solely the Proposer's responsibility to prepare and submit a response to the RFP.

21. Proposal will become public record after the Notice of Intent to Award has been posted and the protest period has closed unless the proposal or specific parts of the proposal can be shown to be exempt by law. Each Proposer may clearly label all or part of a proposal as "CONFIDENTIAL" provided that the Proposer thereby agrees to indemnify and defend the City for honoring such a designation. The failure to so label any information that is released by the City shall constitute a complete waiver of any and all claims for damages caused by any release of the information.

22. A proposal submitted in response to this RFP must identify any subcontractors, and outline the contractual relationship between the Proposer and each subcontractor. An official of each proposed subcontractor must sign, and include as part of the proposal submitted in response to this RFP, a statement to the effect that the subcontractor has read and will agree to abide by the Proposer's obligations.

23. If the Contractor elects to use subcontractors, the City requires that the Awarded Contractor provide proof of payment of any subcontractors used for this project. Proposals shall include a plan by which the City will be notified of such payments.

24. Each Proposer must adhere to the City's Vendor Code of Conduct, including, but not limited to, disclose any existing or potential conflict of interest relative to the performance of the contractual services resulting from this RFP. Any such relationship that might be perceived or represented as a conflict should be disclosed. The City reserves the right to disqualify any Proposer on the grounds of actual or apparent conflict of interest. The Vendor Code of Conduct can be found at <https://longbeach.gov/globalassets/finance/media-library/documents/business-info/purchasing-division/final-vendor-code-of-conduct-2023>

25. Each Proposer must include in its proposal a complete disclosure of any alleged significant prior or ongoing contract failures, any civil or criminal litigation or investigation pending which involves the Proposer or in which the Proposer has been judged guilty or liable. Failure to comply with the terms of this provision will disqualify

any proposal. The City reserves the right to reject any proposal based upon the Proposer's prior history with the City or with any other party, which documents, without limitation, unsatisfactory performance, adversarial or contentious demeanor, significant failure(s) to meet contract milestones or other contractual failures.

26. The City reserves the right to negotiate final contract terms with any Proposers selected. The contract between the parties will consist of the RFP together with any modifications thereto, and the Awarded Contractor's proposal, together with any modifications and clarifications thereto that are submitted at the request of the City during the evaluation and negotiation process. In the event of any conflict or contradiction between or among these documents, the documents shall control in the following order of precedence: the final executed contract, the RFP, any modifications and clarifications to the Awarded Contractor's proposal, and the Awarded Contractor's proposal. Specific exceptions to this general rule may be noted in the final executed contract.
27. The City will not be responsible for or bound by any oral communication or any other information or contact that occurs outside the official communication process specified herein, unless confirmed in writing by the City Contact.
28. Any contract resulting from this RFP shall not be effective unless and until approved by the City Council / City Manager, as applicable.
29. The City will not be liable for Federal, State, or Local excise taxes.
30. Execution of Attachment A of this RFP shall constitute an agreement to all terms and conditions specified in the RFP, including all contract terms and conditions therein, except such terms and conditions that the Proposer expressly excludes.
31. Proposer understands and acknowledges that the representations above are material and important, and will be relied on by the City in evaluation of the proposal. Any Proposer misrepresentation shall be treated as fraudulent concealment from the City of the true facts relating to the proposal.
32. Proposals shall be kept confidential until the Notice of Intent to Award has been posted and the protest period has closed.
33. No announcement concerning the award of a contract as a result of this RFP may be made without the prior written approval of the City.

Proposers are advised that any contract awarded pursuant to this procurement process that exceeds \$100,000 shall be subject to the applicable provisions of Long Beach Municipal Code Section 2.73 et seq, the Equal Benefits Ordinance.

34. All Proposers shall complete and return, with their bid, the Equal Benefits Ordinance Compliance form contained in Attachment B, if applicable. Unless otherwise specified in the procurement package, Proposers do not need to submit with their bid supporting documentation proving compliance. However, supporting documentation verifying that the benefits are provided equally shall be required if the proposer is selected for award of a contract.
35. Independent contractors or employees of a third-party employer who are CalPERS retirees are subject to provisions of the Government Code. A CalPERS retiree is an employee of a CalPERS employer who terminates active employment and receives a monthly CalPERS retirement allowance. Any individual qualifying as a CalPERS retiree doing business as an independent contractor or employee of a third-party employer is required to submit a CalPERS determination to ensure the services provided are considered that of a true independent contractor position. All third-party employers are required to notify any individual they are having work for the City of Long Beach of this requirement. You may reach out directly to CalPERS at membership_reporting@calpers.ca.gov for a determination.

5.3 Contract Terms & Conditions

1. The Awarded Contractor will be the sole point of contract responsibility. The City will look solely to the Awarded Contractor for the performance of all contractual obligations which may result from an award based on this RFP, and the Awarded Contractor shall not be relieved for the non-performance of any or all subcontractors.
2. The Awarded Contractor must maintain, for the duration of its contract, insurance coverages as required by the City. Work on the contract shall not begin until after the Awarded Contractor has submitted acceptable evidence of the required insurance coverages. As a condition precedent to the effectiveness of this contract, Contractor shall procure and maintain at Contractor's expense for the duration of this contract from an insurance company that is admitted to write insurance in the State of California or that has a rating of or equivalent to an A:VIII by A.M. Best and Company the following insurance:

- a. Commercial general liability insurance equivalent in coverage scope to ISO CG 00 01 10 93 naming the City of Long Beach and its officials, employees, and agents as additional insureds on a form equivalent in coverage scope to ISO CG 20 26 11 85 from and against claims, demands, causes of action, expenses, costs, or liability for injury to or death of persons, or damage to or loss of property arising out of activities or work performed by or on behalf of the Contractor in an amount not less than One Million Dollars (US \$1,000,000) per occurrence and Two Million Dollars (US \$2,000,000) in general aggregate. Such insurance shall not exclude coverage for liability resulting from cross liability protection.
- b. Workers' compensation coverage as required by the Labor Code of the State of California and Employer's liability insurance with minimum limits of One Million Dollars (US \$1,000,000) per accident or occupational illness. The policy shall be endorsed with a waiver of the insurer's right of subrogation against the City of Long Beach and its insurers, officials, employees, and agents.
- c. If use of a vehicle is part of the scope of services, commercial automobile liability insurance equivalent in coverage scope to ISO CA 00 01 06 92 in an amount not less than Five Hundred Thousand Dollars (US \$500,000) combined single limit (CSL) covering Symbol 1 ("any auto").
- d. Professional liability or errors and omissions liability insurance in an amount not less than One Million Dollars (\$1,000,000) per claim covering the services provided pursuant to this Contract.
- e. Cyber and privacy insurance (also known as cybersecurity, privacy, and media liability insurance) that does not exclude coverage for liability resulting from the Contractor's or its subcontractors', employees', or agents' failure to protect private or confidential information of City or others from unauthorized access on or through the internet by wi-fi, cellular, Bluetooth, or other network means, making known to any person or organization material that violates a person or organization's right to privacy or publicity right, and failure to prevent the transmission of a computer virus to its authorized users of its web site or any private communication networks, on or through the internet in an amount not less than One Million Dollars (US \$1,000,000) per occurrence and One Million Dollars (US \$1,000,000) in general aggregate.

Any self-insurance program or self-insurance retention must be approved separately in writing by City and shall protect the City of Long Beach and its officials, employees, and agents in the same manner and to the same extent as they would have been protected had the policy or policies not contained retention provisions. Each insurance policy shall be endorsed to state that coverage shall not be suspended, voided, or canceled by either party except after thirty (30) days prior written notice to City, and shall be primary and not contributing to any other insurance or self-insurance maintained by City.

Any subcontractors which Contractor may use in the performance of this contract shall be required to indemnify the City to the same extent as the Contractor and to maintain insurance in compliance with the provisions of this section.

Contractor shall deliver to City certificates of insurance and original endorsements for approval as to sufficiency and form prior to the start of performance hereunder. The certificates and endorsements for each insurance policy shall contain the original signature of a person authorized by that insurer to bind coverage on its behalf. "Claims-made" policies are not acceptable unless City Risk Manager determines that "Occurrence" policies are not available in the market for the risk being insured. If a "Claims-made" policy is accepted, it must provide for an extended reporting period of not less than three (3) years. Such insurance as required herein shall not be deemed to limit Contractor's liability relating to performance under this contract. City reserves the right to require complete certified copies of all said policies at any time. Any modification or waiver of the insurance requirements herein shall be made only with the approval of City Risk Manager. The procuring of insurance shall not be construed as a limitation on liability or as full performance of the indemnification provisions of this contract.

3. The Long Beach Municipal Code (LBMC) requires all businesses operating in the City of Long Beach to pay a business license tax. In some cases, the City may require a regulatory permit and/or evidence of a State or Federal license. Prior to issuing a business license, certain business types will require the business license application and/or business location to be reviewed by the Development Services, Fire, Health, and/or Police Departments. Additional information is available at www.longbeach.gov/finance/business_license.
4. All work performed in connection with construction shall be performed in compliance with all applicable laws, ordinances, rules and regulations of federal,

state, county or municipal governments or agencies (including, without limitation, all applicable federal and state labor standards, including the prevailing wage provisions of Sections 1770 et seq. of the California Labor Code), and (b) all directions, rules and regulations of any fire marshal, health officer, building inspector, or other officer of every governmental agency now having or hereafter acquiring jurisdiction.

5. Awarded Contractor shall indemnify, protect and hold harmless City, its Boards, Commissions, and their officials, employees and agents ("Indemnified Parties"), from and against any and all liability, claims, demands, damage, loss, obligations, causes of action, proceedings, awards, fines, judgments, penalties, costs and expenses, including attorneys' fees, court costs, expert and witness fees, and other costs and fees of litigation, arising or alleged to have arisen, in whole or in part, out of or in connection with (1) Awarded Contractor's breach or failure to comply with any of its obligations contained in this Contract, including any obligations arising from the Awarded Contractor's compliance with or failure to comply with applicable laws, including all applicable federal and state labor requirements including, without limitation, the requirements of California Labor Code Section 1770 et seq. or (2) negligent or willful acts, errors, omissions or misrepresentations committed by Awarded Contractor, its officers, employees, agents, subcontractors, or anyone under Awarded Contractor's control, in the performance of work or services under this Contract (collectively "Claims" or individually "Claim").
6. In addition to Awarded Contractor's duty to indemnify, Awarded Contractor shall have a separate and wholly independent duty to defend Indemnified Parties at Awarded Contractor's expense by legal counsel approved by City, from and against all Claims, and shall continue this defense until the Claims are resolved, whether by settlement, judgment or otherwise. No finding or judgment of negligence, fault, breach, or the like on the part of Awarded Contractor shall be required for the duty to defend to arise. City shall notify Awarded Contractor of any Claim, shall tender the defense of the Claim to Awarded Contractor, and shall assist Awarded Contractor, as may be reasonably requested, in the defense.
7. If a court of competent jurisdiction determines that a Claim was caused by the sole negligence or willful misconduct of Indemnified Parties, Awarded Contractor's costs of defense and indemnity shall be (1) reimbursed in full if the court determines sole negligence by the Indemnified Parties, or (2) reduced by the percentage of willful misconduct attributed by the court to the Indemnified Parties.

8. Any requests for reasonable price adjustments must be submitted 60 days prior to the Contract annual anniversary date. Requests for adjustment in cost of labor and/or materials must be justified based upon verifiable criteria such as the Consumer Price Index, US City Averages, or other relevant indices.
9. If the Awarded Contractor elects to use subcontractors, Awarded Contractor agrees to require its subcontractors to indemnify Indemnified Parties and to provide insurance coverage to the same extent as Awarded Contractor.
10. If the Awarded Contractor elects to use subcontractors, the Awarded Contractor shall not allow any subcontractor to commence work until all insurance required of subcontractor is obtained.
11. The provisions of this section shall survive the expiration or termination of this Contract.

5.4 Additional Requirements

Not Applicable

5.5 Protest Procedures

Who May Protest

Only a Proposer who has actually submitted a proposal is eligible to protest a contract awarded through a Request for Proposals (RFP). A Proposer may not rely on the protest submitted by another Proposer but must pursue its own protest.

Time for Protest

The City will post a notice of the intent to award a contract at least ten (10) business days before an award is made. The notice will be available to all Proposers who submitted a proposal via the City's electronic bid notification system at <http://www.longbeach.gov/purchasing>. A Proposer desiring to submit a protest for a proposal must do so within five (5) business days of the electronic notification of intent to award. The City Purchasing Agent must receive the protest by the close of business on the fifth (5th) business day following posting of notification of intent to award the contract. Proposers are responsible for registering with the City's electronic bid notification system and maintaining an updated Contractor profile. The City is not responsible for Proposers' failure to obtain notification for any reason, including but not limited to failure to maintain updated email addresses, failure to open/read electronic messages and failure of their own computer/technology equipment. The City's RFP justification memo will be available for

review by protestors once the notification of intent to award has been posted via the City's electronic bid notification system.

Form of Protest

The protest must be in writing and signed by the individual who signed the proposal or, if the Proposer is a corporation, by an officer of the corporation, and addressed to the City Purchasing Agent. Protests must be submitted via the email address above. They must include a valid email address and phone number. Protests must set forth a complete and detailed statement of the grounds for the protest and include all relevant information to support the grounds stated, and must refer to specific portions of the RFP and attachments upon which the protest is based. Once the protest is received by the City Purchasing Agent, the City will not accept additional information on the protest unless the City requests it.

City Response to Protest

The City Purchasing Agent or designee will respond with a decision regarding the protest within five (5) business days of receipt of protest to the email address provided in the protest. This decision shall be final.

Limitation of Remedy

The procedure and time limits set forth herein are mandatory and are the Proposer's sole and exclusive remedy in the event of a protest. The Proposer's failure to comply with these procedures shall constitute a waiver of any right to further pursue a protest, including filing a Government Code Claim or initiation of legal proceedings.