

REQUEST FOR PROPOSAL

Original Date Issued: October 1, 2020

Closing Date/Time for Receipt of Proposals: Not applicable*

*The solicitation will remain open until a suitable partner is selected or the solicitation is cancelled at ICMA's discretion. ICMA will review proposals as received.

Subject: Request for Proposal No. ICMAHO/ICMA HSA/2020

The International City/County Management Association (ICMA) is seeking proposals from eligible Respondents to partner with ICMA in offering a Health Savings Account program to public sector employees through local government employers in the United States.

Interested Respondents should send an e-mail to workwithus@icma.org expressing interest in submitting a proposal. Respondents expressing interest in submitting proposals will be required to sign a standard Non-Disclosure Agreement ("NDA").

All technical and contractual questions relating to this solicitation must be submitted to workwithus@icma.org. ICMA will provide written responses to all questions received by Amendment to the solicitation.

All communications must include the solicitation title, ICMAHO/ICMA HSA/2020, in the subject line.

No communication intended to influence selection of a partner by ICMA is permitted except by contacting the designated contacts above. Contacting anyone other than the designated contacts (either directly by the Respondent or indirectly through a lobbyist or other person acting on the Respondent's behalf) in an attempt to influence this procurement: (1) may result in a Respondent being deemed a non-responsive Respondent, and (2) may result in the Respondent not being awarded a contract.

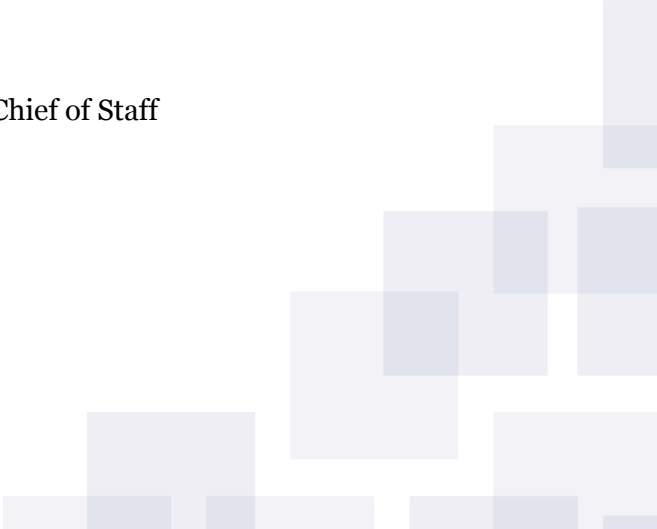
This solicitation in no way obligates ICMA to award a contract nor does it commit ICMA to pay any cost incurred in the preparation and submission of a proposal.

ICMA bears no responsibility for data errors resulting from transmission or conversion processes.

ICMA appreciates your responsiveness and looks forward to a mutually beneficial business relationship.

Sincerely,

Ray Baray, Chief of Staff

A decorative graphic in the bottom right corner consisting of several overlapping, semi-transparent squares in shades of light blue and grey, arranged in a grid-like pattern that tapers off towards the right.

PURPOSE

ICMA seeks proposals to partner with ICMA in providing a comprehensive Health Savings Account (HSA) program through local government employers to public sector employees.

ABOUT ICMA

ICMA is the leading association of local government professionals dedicated to creating and sustaining thriving communities throughout the world. Our mission is to advance professional local government through leadership, management, innovation, and ethics.

ICMA is a 501(c)(3) nonprofit organization founded in 1914 that offers a wide range of services to its more than 13,000 members and the local government community. The organization is an internationally recognized publisher of information resources ranging from textbooks and survey data to topical newsletters and e-publications. ICMA provides training and professional development to its members and technical assistance to local governments in developing and decentralizing countries, helping them to develop professional practices and ethical, transparent governments. The organization performs a wide range of mission-driven grant and contract-funded work both in the U.S. and internationally, which is supported by federal government agencies, foundations, and corporations.

ICMA is the only national organization that focuses on the needs of appointed local government managers. The management decisions made by ICMA's members affect millions of employees and individuals living in thousands of communities, from small villages and towns to large metropolitan areas. For more information regarding ICMA's programs and services, please go to www.icma.org.

ICMA's Dun and Bradstreet number is 072631831.

SCOPE OF WORK

I. BACKGROUND

A robust and effective health and wellness offering that includes an HSA helps local governments to attract and retain top talent. As an organization whose mission is to build better communities through effective local governance, ICMA is interested in partnering with the right organization in offering an HSA program to attract the best talent to local government service. The right organization that offers a robust program will benefit from the backing of the ICMA brand and reputation with key local government decision makers.

II. SOLUTION

ICMA seeks to partner with an organization that offers "best in class" HSA program administration and investment management to public sector employees through local government employers. ICMA would work with the selected partner on an education and marketing plan to increase awareness amongst local governments of the HSA program to be offered in connection with this agreement through ICMA's communication and outreach channels and through prominent placements at ICMA's events and conferences. An effective partnership would have the outcome to effectively educate public sector employees on the benefits of participating in HSA programs and increase enrollment in these programs.

III. BENEFITS OF PARTNERING WITH ICMA

The U.S. local government marketplace is vast with more than 38,000 townships, towns, cities, and counties across the fifty states and five territories. Through a robust ecosystem of communication, marketing, and outreach channels, ICMA provides direct access to the leaders and key decision makers in these communities. ICMA’s stakeholder audience and communication network include: 13,000 members, 90,000 social media followers, 20,000 subscribers of print and digital publications, 6,000 attendees of our annual events, and strong relationships with state and national associations. We help our business partners connect with this enormous marketplace that annually procures \$1.6 trillion in goods and services and includes millions of employees. As one of the public sector’s most trusted institutions, ICMA will leverage our print, digital, and peer to peer communication channels to aggregate the market for a new HSA program and products. To attract and grow a customer base ICMA will offer engagement and outreach initiatives such as: speaking opportunities at our annual and regional conference events; exhibiting and showcasing at ICMA and other local government conferences; advertising in *PM Magazine*, ICMA e-newsletters, and other relevant outlets; social media campaigns; and direct email and print outreach to ICMA members with appropriate marketing collateral.

IV. MONITORING AND ASSESSMENT

It is important that any program with ICMA’s endorsement lives up to the high standards associated with the ICMA brand. To ensure that the program meets these standards consistently, ICMA and the selected partner will, in addition to other assessment tools, conduct an annual survey of program participants to monitor program performance and user satisfaction. ICMA will work with the selected partner on a workplan to assess ongoing performance and to address gaps that may be identified.

V. SUBMISSION REQUIREMENTS

<p>Section 1: Company profile:</p>	<p>Please limit to no more than two pages. CV’s or resumes will not count toward the page limit.</p> <ol style="list-style-type: none"> 1. Provide a description of your business. 2. Provide the year established in the current business for the services requested in this request for proposal. 3. Provide a copy of your annual report, if available, and include information on company size, number of employees and annual revenue. 4. CV’s or resumes of key personnel- in a leading paragraph, please indicate how much time each person will devote to this partnership and what other projects this person will undertake at the same time. Please indicate which of your key personnel will perform the role of a dedicated agent.
<p>Section 2: References:</p>	<p>A description of the types and sizes of client organizations served, as well as a sample client list indicating the type of services rendered. In particular, describe your public sector experience.</p> <p>Respondents should provide references as follows:</p> <ol style="list-style-type: none"> 5. At least three (3) examples of organizations, particularly public sector organizations, where the HSA program is offered by your organization. 6. The contact information should include the contact name, phone number, e-mail address, and website address. References will be contacted as part of the evaluation process.

Section 3. Approach:	<ol style="list-style-type: none"> 1. Describe the organizations for whom you offer HSA programs and your involvement in the initial rollout through ongoing implementation of the programs. 2. Describe your technical capabilities in offering this program to public sector employees. 3. Describe your competitive edge with this offering. 4. Describe how you would market the HSA program to local governments and enhance participation amongst its staff. Describe your views on collaborating on a potential survey of local governments to determine how many offer HDHP plans and interest in HSA programs. 5. Describe the user experience from onboarding, enrollment to ongoing usage. What system would they use? How easy would the end user experience be? How would they track their fund balances and usage? What investment options would they have? How would it be linked with a HDHP insurance plan? 6. Describe your plan for ongoing training and education. 7. Describe implementation plan. Define clearly what your role would be and what would be expected of ICMA. Quantify level of effort needed from ICMA staff as clearly as possible. 8. Describe rollout plan, training, and ongoing support needed. 9. Describe how you envision program monitoring and assessment to work both on an ongoing basis and annually.
Section 4. Pricing:	<ol style="list-style-type: none"> 1. Describe what the fee structure would be to participants in the HSA program. 2. Describe the revenue share you will offer ICMA in exchange for the benefits associated with this partnership.
Section 5. Post-Proposal:	Respondents may be invited to demo their solution to the ICMA evaluation committee and may be asked to take us through a scenario of participant experience from enrollment to ongoing usage.

VI. EVALUATION AND SELECTION PROCESS

Proposals will be evaluated based upon:

1. ability to match the qualifications set forth in this solicitation
 - a. section 1 (15%)
 - b. section 2 (25%)
 - c. section 3 (35%)
2. price structure to include fees charged to participants and revenue share to ICMA (25%)

Respondents who submit the highest scoring proposals based on the evaluation criteria above will be invited to demo their solution to ICMA. Respondents who receive the highest aggregate score (proposal and demo) will be considered for an award under this solicitation.

ICMA reserves the right to award under this solicitation without further negotiations. The respondents are encouraged to offer their best terms and prices with the original submission.

VII. REQUIRED FORMS

W-9
New Vendor Form

VIII. INSTRUCTIONS TO THE RESPONDENTS

Respondents interested in partnering with ICMA to offer the HSA program as described above should submit a proposal following the prescribed format in the Submission Requirements section of this RFP. Adherence to the proposal format by all respondents will ensure a fair evaluation with regard to the needs of ICMA. Respondents who do not follow the prescribed format may be deemed non-responsive. A letter transmitting the proposal must be signed by an officer of the firm authorized to bind the respondent as required by this solicitation.

1. Transmission letter
2. Package no more than 20 pages excluding CV's or resumes and required forms
3. Completed and signed required forms

Packages must be submitted electronically to workwithus@icma.org with "ICMAHO/ICMA HSA/2020" in the subject line. No phone calls please.

IX. GENERAL CONDITIONS

Proposal Submission - Late proposals and proposals lacking the appropriate completed forms will be rejected. Faxed proposals will not be accepted. Proposals will not be accepted at any other ICMA location other than the email address above. If changes are made to this solicitation, notifications will be sent to the primary contact provided to ICMA from each Respondent. ICMA takes no responsibility for effective delivery of the electronic document. The vendor offer will be rejected if the vendor modifies or alters the electronic solicitation documents.

Proprietary Information - Careful consideration should be given before confidential information is submitted to ICMA as part of your proposal. Review should include whether it is critical for evaluating a proposal, and whether general, non-confidential information, may be adequate for review purposes. Information submitted to ICMA that the Respondent wishes to have treated as proprietary and confidential trade secret information should be identified and labeled "Confidential" or "Proprietary" on each page at the time of disclosure. This information should include a written request to except it from disclosure, including a written statement of the reasons why the information should be excepted. However, ICMA cannot guarantee the confidentiality of any information submitted.

Contract Award - ICMA anticipates making one award under this solicitation. It may award a contract based on initial applications without discussion, or following limited discussion or negotiations. Each offer should be submitted using the most favorable cost and technical terms. ICMA may request additional data or material to support applications. ICMA expects to notify Respondents in approximately one month from the proposal due date whether your proposal has been selected to receive an award.

Limitation - This solicitation does not commit ICMA to award a contract, pay any costs incurred in preparing a proposal, or to procure or contract for services or supplies. ICMA reserves the right to accept or reject any or all proposals received, to negotiate with all qualified sources, or to cancel in part or in its entirety the solicitation when it is in ICMA's best interest.

Disclosure Requirement - The Respondent shall disclose any indictment for any alleged felony, or any conviction for a felony within the past five years, under the laws of the United States or any state or territory of the United States, and shall describe circumstances for each.

When a Respondent is an association, partnership, corporation, or other organization, this disclosure requirement includes the organization and its officers, partners, and directors or members of any similarly governing body. If an indictment or conviction should come to the attention of ICMA after the award of a contract, ICMA may exercise its stop-work right pending further investigation, or terminate the agreement.

No Gifts - It is ICMA's Policy that no gifts of any kind and of any value be exchanged between respondents and ICMA personnel. Discovery of the same will be grounds for disqualification of the Respondent from participation in any of ICMA's procurements and may result in disciplinary actions against ICMA personnel involved in such discovered transactions.

Equal Opportunity - In connection with the procurement of the specified services, the firm warrants that it shall not discriminate because of race, color, religion, sex, national origin, political affiliation, non-disabling physical and mental disability, political status, matriculation, sexual orientation, gender identity or expression, genetic information, status as a veteran, physical handicap, age, marital status or any other characteristic protected by law.

Small and Disadvantaged Businesses - ICMA shall use good faith efforts to provide contracting and procurement opportunities for SDB's. SDB categories include minority business enterprises (MBE), woman-owned business enterprises (WBE), small veteran and disabled veteran owned businesses, Historically Black Colleges and Universities (HBCUs), predominantly Hispanic Universities (HACUs), small businesses in Historically Under-utilized Zones (HUBZones) and private voluntary organizations (PVOs) principally operated and managed by economically disadvantaged individuals.