

LEE COUNTY BOARD OF COUNTY COMMISSIONERS
AGENDA ITEM SUMMARY

20030389
BLUE SHEET NO: 20010204

1. REQUESTED MOTION:

ACTION REQUESTED: Award RFP-03-02 EMPLOYEE ASSISTANCE PROGRAM, to the proposer whose proposal was evaluated by the Proposal Evaluation Committee as being in the best interest of Lee County, EAP Consultants, Inc., for Counseling Sessions, Option #1 at \$1.00 per employee per month, for an annual cost of \$34,800.00, Option #2 at \$1.21 per employee per month, for an annual cost of \$42,108.00, Option #3 at \$1.42 per employee per month, for an annual cost of \$49,416.00, (all annual costs are based on an employee base of 2,900), plus accept the Training/Orientation cost stated in the EAP Consultants, Inc. Proposal on an as needed basis. This contract is for a one (1) year with the option of being renewed for two (2) additional one (1) year periods.

WHY ACTION IS NECESSARY: In accordance with the Lee County Contract manual, approved by the Board on April 21, 1993, services estimated to be over level four authorization (\$50,000) shall be executed through the formal process.

WHAT ACTION ACCOMPLISHES: Provides Lee County with a firm that will provide an effective and comprehensive Employee Assistance Program for County employees and their dependent family members.

2. DEPARTMENTAL CATEGORY:
COMMISSION DISTRICT #:

C6E

3. MEETING DATE:

04/22/2003

4. AGENDA

- CONSENT
 ADMINISTRATIVE
 APPEALS
 PUBLIC
 TIME REQUIRED: _____

5. REQUIREMENT/PURPOSE

(Specify)

- STATUTE _____
 ORDINANCE _____
 ADMIN. CODE AC-4-4
 OTHER _____

6. REQUESTOR OF INFORMATION

- A. COMMISSIONER: _____
B. DEPARTMENT: _____
C. DIVISION: Human Resources
BY: George Williams, Division Director

7. BACKGROUND:

The Human Resources office submitted a request to Public Works, Contracts Management to obtain proposals for Employee Assistance Program. The anticipated cost required the use of the formal advertised sealed procedure.

The deadline for receipt of proposals was March 17, 2003. A total of five (5) proposals were received by the established deadline. All five (5) proposals were considered at the Proposal Evaluation Committee meeting held on March 26, 2003. The Proposal Evaluation Committee consisted of the following staff members: Holly Schwartz, Assistant to the County Manager, as Chairman; George Williams, Human Resources Director; and Charlotte Veaux, Human Resources Project Manager.

Based on the information submitted by the proposers in their proposals, it was the consensus of the Committee to recommend award to EAP Consultants, Inc., for Counseling Sessions, Option #1 (3 sessions) at \$1.00 per employee per month, for an annual cost of \$34,800.00, Option #2 (5 sessions) at \$1.21 per employee per month, for an annual cost of \$42,108.00, Option #3 (8 sessions) at \$1.42 per employee per month, for an annual cost of \$49,416.00, (all annual costs are based on an employee base of 2,900), plus accept the Training/Orientation cost stated in the EAP Consultants, Inc. proposal on an as needed basis. The Human Resources Office estimates expenditures not to exceed \$45,000.00 annually.

This contract is for a one (1) year with the option of being renewed for two (2) additional one (1) year periods.

Funding will be available in account string: KE5130257700.503190

Attachment: 1) Overall Evaluation Sheet
2) Tabulation Sheet

8. MANAGEMENT RECOMMENDATIONS:

Recommend approval of option #1.

9. RECOMMENDED APPROVAL

DEPARTMENT DIRECTOR	Purchasing/Contracts	Human Resources	County Administration				OTHER	COUNTY ATTORNEY	COUNTY MANAGER
			OA	OM	Risk	GC			
George A. Williams 4/3/03	[Signature]	[Signature]	OA RK 4/4	OM 4/8/03	Risk 4/5/03	GC 4/4/03	[Signature]	[Signature]	

10. COMMISSION ACTION:

- APPROVED
 DENIED
 DEFERRED
 OTHER

RECEIVED BY
COUNTY ADMIN. [Signature]
4-8-03
4:50
COUNTY ADMIN.
D.S.
4/10 100

Rec. by CoAtty
Date: 4/3/03
Time: 2:00 pm
Forwarded To:
City Admin
4-3-03

LEE COUNTY PROPOSAL
TABULATION SHEET
FOR
EMPLOYEE ASSISTANCE PROGRAM

SOLICITATION NO.: RFP-03-02

DATE: March 17, 2001

FIRM

COUNSELING SESSIONS

Southwest Florida Employee Assistance Program Mr. Joe Lewis 3949 Evans Ave. Suite 202 Fort Myers, FL 33901 Phone: 278-7435 Fax: 278-7439	<u>Options</u>	<u>Monthly Fee</u> <u>Per Employee</u>	<u>Annual Cost</u>
	Option #1- 3 sessions	\$ 1.20	\$41,760.00
	Option #2- 5 sessions	\$ 1.50	\$52,200.00
	Option #3- 8 sessions	\$ 1.95	\$67,860.00
	Option #4- Alternate Pricing		

TRAINING/ORIENTATION

	<u>Quantity</u>	<u>Cost</u>
EAP BROCHURES	2,900	\$ Included
EAP BULLETIN BD POSTERS	up to	\$ Included
EAP LITERATURE RACKS	60 (1/worksite)	\$ Included
TOP LEVEL/EXE BRIEFING	1	\$ Included
SUPERVISORY TRAINING	12	\$ Included
EMPLOYEE ORIENTATION	22	\$ Included
QUARTERLY NEWSLETTERS	2,900	Included

FIRM

COUNSELING SESSIONS

The Allen Group, Inc. Ms. Jeanne Blaisdell 2965 W. SR 434, Suite 100 Longwood, FL 32779 Phone: 407-788-8822 Fax: 407-862-1477	<u>Options</u>	<u>Monthly Fee</u> <u>Per Employee</u>	<u>Annual Cost</u>
	Option #1- 3 sessions	\$ 1.00	\$ 34,800.00
	Option #2- 5 sessions	\$ 1.05	\$ 36,540.00
	Option #3- 8 sessions or unlimited	\$ 1.09	\$ 37,932.00
	Option #4- Alternate Pricing		

TRAINING/ORIENTATION

	<u>Quantity</u>	<u>Cost</u>
EAP BROCHURES		\$ no charge
EAP BULLETIN BD POSTERS		\$ no charge
EAP LITERATURE RACKS		\$ at our cost-\$5-\$15/1 rack
TOP LEVEL/EXE BRIEFING	2 hrs	\$ included in rate
SUPERVISORY TRAINING	8 hrs	\$ included in rate
EMPLOYEE ORIENTATION	10 hrs	\$ included in rate

FIRM

COUNSELING SESSIONS

EAP Consultants, Inc. Ms. Judy Anderson 6237-B Presidential Ct. Fort Myers, FL 33919 Phone: 433-1211 Fax: 482-5335	<u>Options</u>	<u>Monthly Fee</u> <u>Per Employee</u>	<u>Annual Cost</u>
	Option #1- 3 sessions	\$ 1.00	\$ 34,800.00
	Option #2- 5 sessions	\$ 1.21	\$ 42,108.00
	Option #3- 8 sessions	\$ 1.42	\$ 49,416.00
	Option #4- Alternate Pricing		

TRAINING/ORIENTATION

	<u>Quantity</u>	<u>Cost</u>
EAP BROCHURES	3,500	\$ Included in PEPM
EAP BULLETIN BD POSTERS	as needed	\$ Included in PEPM
EAP LITERATURE RACKS	as needed	\$ 150.00
TOP LEVEL/EXE BRIEFING	as needed	\$ Included in PEPM
SUPERVISORY TRAINING	12	\$ Included in PEPM additional@\$125/hour
EMPLOYEE ORIENTATION	30	\$ Included in PEPM additional@\$125/hour

TABULATION SHEET
FOR
EMPLOYEE ASSISTANCE PROGRAM

SOLICITATION NO.: RFP-03-02

DATE: March 17, 2001

FIRM

COUNSELING SESSIONS

Corporate Care Works	Option #1- 3 sessions	\$.80	\$ 27,840.00
Ms. Cynthia Persico	Option #2- 5 sessions	\$ 1.00	\$ 34,800.00
8665 Baypine Rd. Bldg.9, Suite 100	Option #3- 8 sessions	\$ 1.20	\$ 41,760.00
Jacksonville, FL 32256			
Phone: 904-296-9436	Option #4- Alternate Pricing		
Fax: 904-296-1511			

TRAINING/ORIENTATION

	<u>Quantity</u>	<u>Cost</u>
EAP BROCHURES		\$
EAP BULLETIN BD POSTERS		\$ *All services and
EAP LITERATURE RACKS		\$ promotional materials
TOP LEVEL/EXE BRIEFING		\$ are included in the
SUPERVISORY TRAINING		\$ above rates.
EMPLOYEE ORIENTATION		\$

FIRM

COUNSELING SESSIONS

UniPsych Benefits, Inc.	<u>Options</u>	<u>Monthly Fee</u>	<u>Annual Cost</u>
Ms. Denise Scott	Option #1- 3 sessions	\$.97 PEPM	\$ 11.64 PEPY
7777 Davie Rd. Extension, Suite 100A	Option #2- 5 sessions	\$ 1.08 PEPM	\$ 12.96 PEPY
Hollywood, FL 33024	Option #3- 8 sessions	\$ 1.30 PEPM	\$ 15.60 PEPY
Phone: 800-272-3626	Option #4		
Fax: 954-704-8025			

TRAINING/ORIENTATION

	<u>Quantity</u>	<u>Cost</u>
EAP BROCHURES	as needed	\$ Included in PEPM rate
EAP BULLETIN BD POSTERS	as needed	\$ Included in PEPM rate
EAP LITERATURE RACKS	as needed	\$ Included in PEPM rate
TOP LEVEL/EXE BRIEFING	as needed	\$ Included in PEPM rate
SUPERVISORY TRAINING	6 classes/yr	\$ Included in PEPM rate
EMPLOYEE ORIENTATION	as needed	\$ Included in PEPM rate

OVERALL EVALUATION SHEET
FOR
EMPLOYEE ASSISTANCE PROGRAM

SOLICITATION NO.: RFP-03-02
CRITERIA FOR EVALUATION

	RANKING	SWFL-EAP	THE ALLEN GROUP	EAP CONSULTANTS	CORPORATE CARE WORKS	UNIPSYCH BENEFITS INC
Employee Assistance Program Design Quality	20 pts	18	12	20	10	15
Turnaround time for appointments	10 pts	10	6	10	5	7
Return call turnaround time to EAP Coordinator	10 pts	0	7	8	5	9
Ability to provide scope of all Employee Assistance Program services and materials	10 pts	9	5	9	5	8
Location of office or offices where Employee Assistance Program services will be provided	20 pts	18	7	18	10	17
Cost of Employee Assistance Program services and materials	10 pts	6	9	7	10	8
Proven record of expertise in furnishing professional Employee Assistance Program services based upon references provided	15 pts	15	15	15	15	10
Educational and professional background of counselors and other key personnel	5 pts	5	5	5	5	5
TOTAL	100 pts	81	66	92	65	79