



**REQUEST FOR PROPOSAL (RFP)  
FOR  
EDUCATIONAL PROGRAMS FOR OLDER ADULTS  
RFP NO. 4284**

<b>Release Date:</b>	<b>Monday, September 16, 2024</b>	
<b>Proposal Due Date:</b>	<b>Friday, October 4, 2024 3:00 P.M. Pacific Time</b>  <b>Electronic submission <a href="#">here</a></b>	<b>RFP Administrator:</b>  <b>Kristen Szanto</b> Los Angeles City Employees' Retirement System E-mail: <a href="mailto:kristen.szanto@lacers.org">kristen.szanto@lacers.org</a>
<b>All questions must be submitted in writing no later than:</b>	<b>Monday, September 23, 2024, 3:00 P.M. Pacific Time</b>  Submit questions to the RFP Administrator. Any questions and all answers will be posted on the LACERS website: <a href="https://www.lacers.org/rfps-contracting-opportunities">https://www.lacers.org/rfps-contracting-opportunities</a>	
<b>Official RFP Notices/Addendums:</b>	To ensure that no firm is provided an advantage over another, all requirements are specified in this RFP. Any changes to the requirements will be posted as an addendum to the RFP on the LACERS website: <a href="https://www.lacers.org/rfps-contracting-opportunities">https://www.lacers.org/rfps-contracting-opportunities</a> . Proposers are solely responsible for monitoring this website and adhering to RFP addendums.	
<b>Prohibited Communications:</b>	From the RFP release date until a contract for these services is fully executed, firms are prohibited from communicating with Board members or staff, other than the RFP Administrator, concerning this RFP or the resulting contract. Any communications could be considered attempts to lobby or market services and is therefore prohibited by LACERS' Ethical Contract Compliance Policy. Firms will be disqualified from contract consideration if the prohibition is not honored.	

# TABLE OF CONTENTS

<b>I. INTRODUCTION.....</b>	<b>3</b>
<b>II. MINIMUM QUALIFICATIONS .....</b>	<b>3</b>
<b>III. SCOPE OF SERVICES .....</b>	<b>5</b>
<b>IV. CONTENT OF RESPONSE .....</b>	<b>7</b>
<b>V. PROPOSAL SUBMISSION &amp; EVALUATION .....</b>	<b>8</b>
A. PROPOSAL SUBMISSION INSTRUCTIONS.....	8
B. EVALUATION OF PROPOSALS .....	9
<b>VI. GENERAL CONDITIONS AND COMPLIANCE DOCUMENTS .....</b>	<b>10</b>
<b>VII. EXECUTIVE DIRECTIVE 35.....</b>	<b>11</b>

## I. INTRODUCTION

The Los Angeles City Employees' Retirement System (LACERS) is a defined benefit plan providing retirement and retiree health benefits to approximately 23,000 retirees and beneficiaries of the City of Los Angeles. Our LACERS Well Program aims to enhance our members' quality of life and retirement by providing resources and activities that promote optimal health and wellness.

LACERS is issuing a Request for Proposals (RFP) to solicit proposals from qualified organizations, including non-profits. LACERS seeks to partner with qualified organizations who can effectively meet the distinct needs of our older adult population in the below categories:

**Fitness Instruction:** Deliver on-site and in-person and virtual fitness classes tailored to the needs of our older adult population; provide engaging fitness programs, including low-impact exercises, balance, strength, and flexibility training, to promote physical activity, mental resilience, and social connection; lead in-person events, such as motivational workshops and seminars and one to two 5K walks per year.

**Technology Education and Support Services:** Provide on-site and virtual information technology support services for our older adult population; assist Members in navigating new technologies and digital resources offered by LACERS and its medical carriers; address barriers such as limited digital literacy and physical limitations to ensure effective use of online services and applications.

**Older Adult Education:** Provide programs that enhance LACERS Well activities, including educational programs that promote physical, medical, and mental health activities; provide and lead virtual and in-person events and seminars.

This RFP seeks various services for LACERS Retired Members, for a term of three years, not to exceed \$25,000 annually per contract for each category of services. Proposals must clearly address the scope of work for each contract separately, as LACERS will evaluate each proposal independently based on its respective requirements. A Proposer does not need to satisfy all three categories of requested skills and services but may only propose to deliver services from one category.

## II. MINIMUM QUALIFICATIONS

LACERS is committed to enhancing the well-being of our Members through comprehensive wellness programs. To ensure effective and empathetic support for the unique needs of our Members, all vendors should specialize or have extensive experience in providing services to an older adult population to ensure programs are effectively tailored to their specific needs. All applicants must be able to receive legal authorization to do business in the City of Los Angeles, with all required permits and licenses in full force at the time of contract effect.

### Fitness Instruction

LACERS seeks a vendor with highly qualified fitness providers (instructors) with specific expertise in working with older adults. The vendor should possess the skills and experience necessary to deliver both onsite and virtual fitness services tailored to the unique needs of our older adult population. This contract aims to ensure that our Members can receive engaging and effective fitness programs that promote physical health, mental resilience, and social connectivity.

- At least five (5) years of experience conducting both onsite and virtual fitness classes specifically with older adults.
- A track record of engaging participants in diverse fitness programs tailored to varying ability levels and goals.
- Demonstrated ability to engage and motivate older adults in a variety of fitness programs.
- Proficiency in using Zoom or similar platforms to host virtual fitness classes.
- Relevant education in exercise science, exercise physiology, kinesiology, or a related field is preferred.
- Excellent verbal communication skills for clear instruction and participant engagement.
- Experience in designing and implementing fitness programs that address different ability levels and goals.

### **Technology Education and Support Services**

LACERS seeks a vendor with proven expertise in providing information technology education and support, specifically with older adults. The selected Contractor must demonstrate:

- A minimum of five (5) years of extensive experience working with older adults in an information technology support capacity.
- A deep understanding of the technological challenges faced by the demographic of older adults.
- Strong communication skills to patiently guide older adults through technology challenges, clearly explaining procedures and providing instructions in an accessible manner.
- Experience with organizations similar to LACERS in offering technical support services to older adults.
- Proficiency in using webinar platforms (e.g., Zoom, Microsoft Teams) and virtual meeting tools for facilitating online workshops and one-on-one sessions.
- Ability to troubleshoot and provide support for commonly used mobile devices (such as smartphones and tablets) and applications, including those related to healthcare management and wellness programs tailored to older adults.

### **Older Adult Education**

LACERS seeks a vendor, preferably a non-profit organization with 501(c)(3) status, to provide various education programs to enhance the well-being of our Retired Members. The vendor will be responsible for delivering informative and engaging programs that address key areas relevant to senior living, including health, financial planning, and emotional well-being.

- A minimum of five (5) years of experience in delivering educational seminars specifically designed for older adults.
- Proven expertise in topics such as advanced planning, health management, financial wellness, fall prevention, coping with loss & grief, sleep habits, medication management, healthy eating, pain management, and technology support.
- Has qualified instructors, presenters, facilitators, and moderators with relevant certifications and professional experience in older adult education.
- Experienced in providing both virtual and in-person seminars.

- Proficient in using virtual meeting platforms (e.g., Zoom) for delivering online seminars and workshops.
- Able to provide all necessary materials and resources required for the effective delivery of educational programs.
- Proven track record of successful collaboration with similar organizations or projects, with positive references or case studies available.
- Exhibit strong communication skills to effectively engage with older adult audiences and present information in an accessible and engaging manner.

### III. SCOPE OF SERVICES

The Contractor(s) will be required to provide proof of insurance and other documentation—more information is contained in the General Conditions and Compliance Documents in Section VI.

The Contractor(s) will be required to provide one or more of the services listed below:

#### **Fitness Instruction**

On-site events include fitness classes and workshops at designated locations. Classes should include low-impact exercises, balance training, strength building, and flexibility exercises tailored to older adults.

Virtual sessions offering live fitness classes via platforms such as Zoom, including the same types of exercises as in-person classes. Ensure classes are accessible and engaging for remote participants.

Development of fitness programs that cater to varying levels of ability and fitness goals. Provide a detailed schedule and description of fitness programs, including objectives, class formats, and any required equipment. Implement strategies to motivate and engage older adults, ensuring classes are interactive and encouraging. Provide feedback mechanisms for participants to voice their needs and preferences.

Conduct motivational workshops and seminars focused on physical wellness, mental resilience, and the benefits of regular physical activity.

Monitor and evaluate the effectiveness of fitness programs through participant feedback and attendance records. Provide regular reports on program participation, feedback, and overall impact.

#### **Technology Education and Support Services**

Provide Technology Support, including the ability to receive inbound calls from LACERS' Members seeking assistance. Assist with the installation and configuration of Zoom for virtual meeting participation. Resolve technical issues related to mobile phones, tablets, computers and internet connectivity. Provide both remote and on-site support, ensuring data security and privacy while maintaining a high standard of customer service.

Facilitate Virtual Meetings' technical aspects on an as-needed basis.

Arrive 15-30 minutes early to begin the virtual meetings and configure waiting rooms, if applicable. Monitor waiting rooms and manage attendees' entry. Assist with audio and video issues during the meetings. Record meetings and provide high-quality edits for publishing.

Conduct monthly technology classes for at least 1 ½ hours covering various topics including:

- Cyber security
- Smartphone Workshop
- Resolving Printer Issues
- Online Fraud Prevention
- As needed topics

### **Senior Education Services**

The selected non-profit organization, ideally a 501(c)(3), will be responsible for conducting seminars to our Members on various topics pertinent to senior living including advanced planning, health management, financial wellness, emotional well-being, fall prevention, coping with loss and grief, sleep habits, medication management, healthy eating, pain management, and lifestyle enhancements.

In addition to the scheduled seminars, the organization will be expected to develop and deliver customized presentations based on specific topics requested by LACERS. The provider must be able to facilitate engaging roundtable discussions that encourage participant interaction and shared learning on issues impacting older adults. LACERS may review the materials prior to the seminar.

The organization shall have experience conducting workshops focused on healthier living, addressing areas such as nutrition, stress management, preventive health care, and the maintenance of social connections. The organization will prepare and distribute necessary materials and resources for these seminars and workshops, including presentation slides, handouts, and other educational aids.

Both virtual and in-person delivery options will be required, utilizing platforms like Zoom for virtual sessions and designated locations for in-person events. Additionally, all information provided about legal and financial matters should be general in nature because the Contractor is precluded from providing specific and/or individualized investment recommendations and legal advice. Prior to participation, LACERS may require Members to complete a waiver.

### **Vendor Restrictions**

Prohibition on Marketing and Referrals: the Contractor is strictly prohibited from using any part of this engagement, including interactions with LACERS Members before, after, or during seminars, to market or promote products or services for personal or commercial gain. The Contractor is precluded from providing any commercial endorsements, solicitations, or referrals. This includes, but is not limited to, soliciting Members for any form of remuneration, or referring Members to other individuals or entities for commercial purposes. The Contractor must ensure that all communications and interactions are focused solely on the delivery of services specified in this RFP, which pertain to fitness, technology, and generalized wellness advice that does not include Member-specific financial counseling or legal advice. Any communications between LACERS Members and Contractor before or after a seminar, shall be limited to those voluntarily initiated by the LACERS Member.

## IV. CONTENT OF RESPONSE

Proposers responding to this RFP must follow the response template for the service(s) they are bidding to provide:

1. **Fitness Instruction:** Use and complete **Attachment A**.
2. **Technology Support Services:** Use and complete **Attachment B**.
3. **Senior Education Services:** Use and complete **Attachment C**.
4. **Cover Letter:** The Proposer shall provide a cover letter that includes
  - a. The legal business name, address, telephone number, website URL, and business status (Individual, limited liability partnership, corporation, etc.) of the firm.
  - b. The person or persons authorized to represent the proposer in negotiations with LACERS with respect to the RFP and any subsequently awarded contract. Provide the representative's name, title, address, telephone number, e-mail address, and any limitation of authority for the person named.
  - c. The following statement: "This proposal is genuine, and not sham or collusive, nor made in the interest or on behalf of any person not named therein; the proposer has not directly or indirectly induced or solicited any other proposer to put in a sham bid, or any other person, firm or corporation to refrain from submitting a proposal, and the proposer has not in any manner sought by collusion to secure for themselves an advantage over any other proposer."
  - d. LACERS is subject to the California Public Records Act (California Government Code Section 7920.000 *et seq.* If the response will include any confidential material or proprietary material that is exempt from disclosure under the California Public Records Act, then the Proposer must indicate on each page of the proposal where there is exempt material, provide a redacted copy and include the following statement in the cover letter: "Proposer agrees to defend, indemnify and hold harmless the City of Los Angeles, LACERS, the LACERS Board of Administration, officers, agents, and employees from and against all suits, claims, and causes of action brought for LACERS' refusal to disclose any trade secrets or confidential information to any person making a request pursuant to the California Public Records Act (California Government Code Section 7920.000 *et seq.*)." Failure to identify that information in the proposal shall constitute a waiver of the Proposer's right to exemption from disclosure.
  - e. The Standard Provisions for City Contracts (Rev. 06/24 v. 1) (Appendix B) are part of every City contract for general services. If you anticipate requesting any alternatives and/or substitutions, please indicate those requested alternatives in

your cover letter. LACERS reserves the right to determine if the alternatives/substitutions are acceptable.

- f. The cover letter is to be signed by a person or persons authorized to bind the proposer to all provisions of the RFP, any subsequent changes to the RFP, and to the contract if an award is made. (If the respondent is a partnership, the response must be signed by a general partner in the name of the partnership. If the respondent is a corporation, the response must be signed on behalf of the corporation by two authorized officers [a Chairman of the Board, President or Vice President, and a Secretary, Treasurer or Chief Financial Officer] or an officer authorized by the Board of Directors to execute such documents on behalf of the corporation.)

Incomplete or incorrectly filled forms and submissions may result in disqualification, eliminating the Proposer from further consideration in the evaluation process. The Proposer will not be allowed to alter proposal documents after the Proposal Submission Deadline, except as allowed by LACERS in its sole discretion.

## **V. PROPOSAL SUBMISSION & EVALUATION**

### **A. PROPOSAL SUBMISSION INSTRUCTIONS**

- 1) The deadline for submission and the location for submission are located on Page 1 of this RFP. Late proposals will not be considered. Complete proposal package shall be clearly labeled with the name of the organization, and “2024 EDUCATIONAL PROGRAMS FOR OLDER ADULTS RFP”. LACERS retains the right to determine if a proposal has been timely submitted.
- 2) The Proposer is responsible for all errors or omissions found in their proposal. The Proposer will not be allowed to alter proposal documents after the Proposal Submission Deadline, except as allowed by LACERS in its sole discretion.
- 3) If a Proposer is claiming an exemption under the California Public Records Act, as noted in Section IV.4.d. of this RFP, it must also submit separately one (1) redacted copy of the proposal in addition to the original version. In the original version, the word CONFIDENTIAL should be stamped and must be clearly designated on every page in the proposal containing proprietary or trade secret information. Failure to provide a redacted proposal or to stamp confidential pages will be deemed a waiver of any exemption.
- 4) All questions and contact regarding this RFP or any matter relating thereto must be in writing and be emailed to the administrator listed on the RFP’s cover page. All questions or contacts related to the RFP with the LACERS office or staff is strictly prohibited during the proposal process.
- 5) Should LACERS receive only one proposal submission in response to this solicitation, LACERS reserves the right to classify this procurement a failed competition and re-compete the procurement.
- 6) LACERS reserves the right to select more than one organization for a particular service and to enter a nonexclusive contract with multiple Contractors.



## B. EVALUATION OF PROPOSALS

The selected proposer must successfully pass all the following levels of review:

### Level I – Preliminary Evaluation of Responsiveness

Proposals will be reviewed to determine the Proposer's compliance with proposal requirements and mandatory document submissions.

### Level II – Review of Qualifications, Experience, & References

Proposer must demonstrate they meet the minimum qualifications outlined in this RFP. LACERS will conduct due diligence and reference checks at this level.

### Level III – Review of Services Offered and Fee Schedules

Proposers' plan of services and fees for providing the service are evaluated and ranked. Finalist(s) may be interviewed. If interviewed, the meeting will be virtual. In no case will the negotiations result in a fee that is higher than the fee contained in the proposed fee schedule.

### Level IV – Final Approval by the Board

The Proposer(s) that demonstrates to be the most qualified to provide the services that meet LACERS' Well Program needs at the best overall value will be recommended for contract award to the LACERS Board of Administration (Board). The Board, at its sole discretion, makes the final award determination.

EVALUATION CRITERIA	POSSIBLE WEIGHT
<b>Experience and Qualifications</b> This criterion evaluates the contractor's relevant experience, qualifications of key personnel, and past performance. It assesses whether the contractor has a proven track record of successfully delivering similar services.	40
<b>Approach and Methodology</b> This criterion assesses the clarity, effectiveness, and feasibility of the contractor's approach and methodology for delivering the services. It includes the design and implementation strategies proposed.	30
<b>Budget and Pricing</b> This criterion evaluates the cost-effectiveness of the proposal. It assesses the clarity and reasonableness of the budget and pricing structure in relation to the proposed services.	30

<b>TOTAL POINTS</b>	<b>100</b>
---------------------	------------

1) Tentative Schedule

This schedule indicates estimated dates for the RFP process. LACERS reserves the right to adjust this schedule when appropriate. Any questions or contacts relating to the RFP with the LACERS office or staff is strictly prohibited during the proposal process.

<b>Date</b>	<b>Event</b>
September 16, 2024	Release of RFP
September 20, 2024	Online Pre-Bid Meeting Via Zoom <a href="#">(Here)</a> - 2:00 PM PST Meeting ID: 840 6212 1472 Passcode: 551542
September 23, 2024	Deadline for RFP questions - 3:00 PM PST
September 27, 2024	RFP question responses posted
October 4, 2024	Deadline for proposal submissions - 3:00 PM PST
November 2024	Target period for LACERS Board of Administration consideration of contract award
January 1, 2025	Tentative contract start date

**VI. GENERAL CONDITIONS AND COMPLIANCE DOCUMENTS**

Proposers are to submit required documents specified in the General Conditions and Compliance Documents (Appendix A). The General Conditions also indicate several standard contracting provisions and requirements of every LACERS and City of Los Angeles contract. You are encouraged to read the documents thoroughly, including the Standard Provisions for City Contracts (Rev. 06/24 v.1) (Appendix B), as they may result in additional expense to your firm, such as certain insurance requirements and a Los Angeles Business Tax Registration Certificate. This RFP is for a new contract. Previous document submittals and/or waivers do not apply. New forms must be completed and processed.

**Sexual Harassment Policy**

Proposers are advised that if selected and awarded a contract, then the Proposer will be required to comply with LACERS’ Sexual Harassment policy, which will require the Proposer to affirm the following:

“The Contractor is committed to a work environment in which all individuals are treated with respect and dignity. Each individual has the right to work in a professional atmosphere that promotes equal employment opportunities and prohibits unlawful discriminatory practices, including harassment. Contractor has developed policies to ensure that all its employees and equity partners can work in an environment free from unlawful harassment, discrimination, and retaliation. Contractor will make every reasonable effort to ensure that all employees, equity partners, and contractors are familiar with its policies and compliance procedures, and that all are aware that any complaint of a violation of such policies will be investigated and resolved appropriately.

Contractors encourage reporting of all perceived incidents of discrimination or harassment, and it has adopted the policy to promptly and thoroughly investigate such reports.

Contractor represents that it currently does not have any pending or anticipated litigation against the company or its employees, involving allegations of sexual harassment or misconduct. Contractor shall promptly notify LACERS’ Representative in the event any litigation involving sexual harassment or misconduct is filed against the company or any employee.”

## VII. EXECUTIVE DIRECTIVE 35

Respondents are advised, pursuant to the Mayor’s Executive Directive 35, if a contractor is a privately held, for-profit company or corporation, then the contractor shall, within 30 days of the effective date of the contract and on an annual basis thereafter (i.e., within 30 days of the anniversary of the effective date of the contract), report the following demographic information to the City via the Regional Alliance Marketplace for Procurement (RAMP): contractor’s and any subcontractor’s annual revenue, number of employees, location, industry, race/ethnicity, and gender of majority owner ("contractor/subcontractor Information"). On an annual basis, the contractor shall further request that any subcontractor input or update its business profile, including the contractor/subcontractor information, on RAMP or via another method prescribed by City.

Disclosure of demographic information is informational, occurs only after a contract mandate is awarded, and will in no way impact the bidding, selection, or awarding process of a contract.