

Montgomery County School District
640 Woodford Drive
Mt. Sterling, KY 40353
859-497-8760



REQUEST FOR PROPOSALS

Medical Examinations & Services

Proposal Release Date: Thursday, November 15, 2018

Proposal Due Date: Friday, November 30, 2018, 8:30 a.m.

EDT

Montgomery County School District

EQUAL OPPORTUNITY/AFFIRMATIVE ACTION EMPLOYER

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INTRODUCTION

Montgomery County School District is a PreK-12 school district located approximately 30 miles east of Lexington, KY. We serve approximately 4,900 students with a staff of near 700 employees. The District includes four elementary schools, a middle school, a high school, an alternative school, and three KECSAC schools. In addition, services are needed at our central office, maintenance building, school nutrition, curriculum, and transportation departments.

STATEMENT OF PURPOSE

The purpose of this document is to solicit proposals for supplying pre-employment and other needed medical services as listed below. Interested vendors should submit a formal proposal from their organization which addresses the costs for each listed service they are able to provide from the listing.

GENERAL PROPOSAL INSTRUCTIONS AND CONDITIONS

Acceptance of Proposal

Proposals will be received to the attention of Richard Culross, Deputy Superintendent of Support Services, 640 Woodford Drive, Mt. Sterling, KY 40353, until 8:30 a.m., Friday, November 30, 2018. Proposals shall be submitted in a sealed envelope clearly marked "District Medical Examination & Services Proposal." An officer of the firm, who is authorized to legally bind the firm, must sign the bid form.

All proposals which are in order and properly signed shall be opened and reviewed. No immediate decisions shall be rendered concerning the submitted proposals.

All responses may be rejected at the discretion of the Montgomery County School District. The Montgomery County School District reserves the right to choose the response(s) that best suit the District's needs. This RFP in no way constitutes a contract or commitment to provide patients. If all responses are rejected, the Montgomery County School District reserves the right to publish an RFP at a later date. As employees sometimes like to be provided with choices, the board also maintains the right to enter into agreements with more than one vendor. Exclusivity is not necessary as part of our RFP.

All proposals shall be effective for ninety (90) days from date of opening unless otherwise specified in special conditions of bidding, and no bid may be withdrawn prior to that time.

Please provide 3 local references (name of reference and point of contact) of those you presently serve that are utilizing similar medical examinations and/or services. The references should be from customers of like service size and needs. References from educational institutions are highly preferred but not required.

Bidders must provide assurance for on-site response time to all locations in the district.

Model Procurement Regulations

The Model Procurement Regulations adopted by the Board of Education shall be deemed incorporated by reference in these specifications as though fully quoted herein. In the event of any conflict between this invitation for proposal and the Model Procurement Regulations, the Regulations shall control.

Penalties

In case of default by the vendor, the Board of Education may procure the articles or services from other sources and may deduct from any unpaid balance due the vendor the amount of the excess costs so paid, and the price paid shall be considered the prevailing market price at the time such purchase is made.

Taxes

Federal Excise Taxes or Kentucky State Sales and Use Taxes are not applicable to any purchase made for the Montgomery County School District. Purchase exemption certificates will be furnished as required.

Non-discrimination

During the performance of this Contract, the Seller agrees as follows:

1. The Seller shall not discriminate against any employee, applicant, or subcontractor because of age, color, creed, handicap condition, marital or parental status, national origin, race, sex, veteran status, or political opinion or affiliation. The Seller shall take affirmative action to ensure that applicants are employed without regard to their age, color, creed, handicap condition, marital or parental status, national origin, race, sex, veteran status, or political opinion or affiliation. Such action shall include, although not limited to the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The Seller agrees to post in conspicuous place notices setting forth the provisions of the Equal Opportunity clause.
2. The Seller shall in all solicitations and/or advertisements for employees placed by or on behalf of the Seller, state that all qualified applications shall receive consideration for employment with regard to age, color, creed, handicap condition, marital or parental status, national origin, race, sex, veteran status, or political opinion or affiliation.
3. The Seller shall cause any subcontractor engaged to perform any services required by this Contract to include this Equal Opportunity clause in all solicitations, advertisements and employment practices it shall perform.

RFP Questions

Our objective is to ensure that we provide you with all of the information you need in order for you to provide the most complete response to this RFP as possible. As such, we welcome any and all questions which you might have. Questions or requests for clarification must be emailed to: richard.culross@montgomery.kyschools.us. These questions and the answers to the questions will be distributed to all parties participating in the RFP process. Phone discussions will not be permitted so as to provide the same information for all vendors.

Important Dates

Date	Action
10am EST, November 15, 2018	RFP is made available through email/website/local newspaper.
10am EST, November 15, 2018	Vendors may begin submitting questions through email.
4pm EST, November 26, 2018	Question and Answer process ends.
8:30 am EST, November 30, 2018	Completed response to RFP due. Sealed packet should be delivered to District's Central Office (640 Woodford Drive, Mt. Sterling, KY). Packet should include one primary contact and his/her email address.
8:30 am EST, November 30, 2018	Packets will be opened at District's Central Office (640 Woodford Drive). No decisions will be made at this time and no questions will be answered. Bids will be announced and recorded on an official Bid Tabulation Sheet.
As soon as possible after the December 18, 2018 Board of Education Meeting	District will announce RFP recipient(s).
2pm EDT, January 8, 2018	District Representatives will meet with successful vendors to review necessary procedures to include services, referrals, and payment.

SCOPE OF THE RFP

Project Objectives

The District intends to enter into memorandums of agreement for those providing medical examinations and services including:

- Pre-Employment Physicals
- DOT/CDL Physicals
- Urine Drug Screen Collection and/or Rapid Drug Screen Urinalysis
- TB Skin Test or Risk Assessment
- Evidential Breath Test
- Visual Acuity Eye Exam
- Other products and services offered by company

Company Background and History

The proposal should include a comprehensive narrative history of the firm, including the development of its experience in providing services similar to those described in the project scope. The following points should be addressed in the third tab of the proposal:

- Total number of employees
- Office location(s)
- Total number of active patients
- Total number of school districts for which similar services have been provided
- Total number of businesses with similar services provided

Services including:

- DOT/CDL Pre-Employment Physical
- Pulmonary Function Test Audiogram
- Urine Drug Screen Collection and/or Rapid Drug Screen Urinalysis
- Blood Glucose
- TB Skin Test or Risk Assessment
- Evidential Breath Test
- Visual Acuity Eye Exam
- Other products and services offered by company

Contract Term

The initial term of the contract will be up to three (3) years from the date that the contract is agreed upon. At the District's option, the contract may be renewed for up to two (2) additional one (1) year terms. All terms and conditions shall remain in force for the term of the contract and for any renewal period unless modified by mutual agreement of both parties. Cost of services shall not be increased during the initial term of the contract. Cost of services for any renewal periods will be subject to the mutual agreement of both parties.

Sub-Contracting

The bidder should identify any of the required services that are proposed to be sub-contracted, if any. For each of these services the following should be provided:

- Summary of service
- Reasons for sub-contracting
- Proposed sub-contractor(s)
- Detailed sub-contractor responsibilities
- Sub-contractor name
- Sub-contractor location
- Sub-contractor experience
- Previous use of sub-contractor
- Any additional relevant information

Proposal Spreadsheet

All pricing and proposal information must be entered on the attached Bid Form. The only information that will be considered during the bid opening is the information included on the district's spreadsheet. Bids that do not include information on the district's bid sheet will be rejected.

**Medical Examinations and Services
 Montgomery County School District**

BID PROPOSAL FORM - PAGE 1

Having carefully examined the instructions to bidders and all specifications on the above referenced bid, the undersigned bidder proposes to furnish all labor, materials, equipment, tools, supplies, services, and temporary devices required to complete the work in accordance with the contract documents and services listed below for the price stated herein.

**Contract(s) may be awarded to the lowest and/or best evaluated bidder(s) meeting all specifications and conditions, and subject to all other provisions of this invitation to bid, on a per item basis, on a group basis, or on a total basis, whichever is deemed to be in the best interest of The Board of Education.*

Company Name: _____

Individual Services: Please complete with cost of each service.

If you do not provide service, please write NA.

SERVICE	Approximate Number of Occurrences per Year	PRICE PER SERVICE (Please complete with cost of service)
Pre-Employment Physical Non-CDL	75	
Pre-Employment Physical DOT/CDL	20	
Annual DOT/CDL Physicals	75	
Pre-Employment Drug Screen Non-CDL	125	
Pre-Employment Drug Screen DOT/CDL	20	
Post-Accident Drug Screen Non-CDL	5	
Post-Accident Drug Screen DOT/CDL	20	
Evidential Breath Test (Post Accident)	25	
Vaccinations (Including, but not limited to Hepatitis A and B)	10	
Pulmonary Function Test Audiogram	NA	
Blood Glucose	NA	
Visual Acuity Eye Exam	NA	
TB Skin Test	25	
TB Risk Assessment	125	

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BID PROPOSAL FORM - PAGE 2

We, the undersigned hereby agree to furnish to the Board of Education with the services as described as may be required during the year from date of contract in accordance with specifications and general conditions all of which form a part hereof.

Company _____
Contact/Title _____
Street Address _____
City _____ State _____ Zip _____
Telephone _____
Fax _____
E-Mail Address _____
Web Address _____
Payment Terms: _____
Authorized Bidder's Signature _____
Date _____

Insurance Carrier Name: _____ **Coverage Amount:** _____

MEDICAL PRACTICE INSURANCE CARRIER PROOF AND COVERAGE AMOUNT WILL BE REQUIRED FOR SUCCESSFUL BIDDERS

Upon Bid Submittal Bidder Shall Provide the Following:

- Completed Attached Bid Form (pg.8-9)
- Three Work References (with company names, address, phone #'s, contact names and e-mail addresses) (pg.12)
- Proof of Required Insurance
- Signed and Dated Conflict of Interest Form (pg. 11)
- Required Affidavit for Bidders and Contractors claiming resident bidder status.(pg.13)
- W-9 (pg.14)

Montgomery County School District
640 Woodford Drive
Mt. Sterling, KY 40353

Prohibition against conflict of interest, gratuities and kickbacks

KRS 45A.455 prohibits conflicts of interest, gratuities, and kickbacks to employees of Montgomery County Schools in connection with contracts for supplies or services, whether such gratuities or kickbacks are direct or indirect.

Any employee or any official of the board of education of Montgomery County School District, Mt. Sterling, Kentucky, elective or appointive, who shall take, receive, or offer to take or receive, either directly or indirectly, any rebate, percentage of contract, money, or other things of value, as in inducement or intended inducement, in the procurement of business, or the giving of business, for or to, or from, any person, partnership, firm or corporation, offering bidding for, or in open market seeking to make sales to the board of education of Montgomery County Schools, Mt. Sterling, Kentucky, shall be deemed guilty of a felony and upon conviction such person or persons shall be punished by a fine not to exceed five thousand dollars (\$5000) or by imprisonment in the penitentiary for not less than one (1) year nor more than ten (10) years, or both so fined and imprisoned in the discretion of the jury.

Note: it is a misdemeanor not to have this prohibition on every solicitation or contract document. The penalty is a \$5000 fine or one (1) year imprisonment or both on conviction.

Conflict of Interest

1. It shall be a breach of ethical standards for any employee with procurement authority to participate directly in any proceeding or application; request for ruling or other determination; claim or controversy; or other particular matter pertaining to any contract, or subcontract, and any solicitation or proposal therefor, in which to his knowledge:
 - a) He, or any member of his immediate family has a financial interest therein; or
 - b) A business or organization in which he or any member of his immediate family has a financial interest as an officer, director, trustee, partner, or employee, is a party; or
 - c) Any other person, business, or organization with whom he or any member of his immediate family is negotiating or has an arrangement concerning prospective employment is a party. Direct or indirect participation shall include but not be limited to involvement through decision, approval, disapproval, recommendation, preparation of any part of a purchase request, influencing the content of any specification or purchase standard, rendering of advice, investigation, auditing, or in any other advisory capacity.
2. It shall be a breach of ethical standards for any person to offer, give, or agree to give any employee or former employee, or for any employee or former employee to solicit, demand, accept, or agree to accept from another person, a gratuity or an offer of employment, in connection with any decision, approval, disapproval, recommendation, preparation of any part of a purchase request, influencing the content of any specification or purchase standard, rendering of advice, investigation, auditing, or in any other advisory capacity in any proceeding or application, request for ruling or other determination, claim or controversy, or other particular matter, pertaining to any contract or subcontract and any solicitation or proposal therefor.
3. It is a breach of ethical standards for any payment, gratuity, or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or higher tier subcontractor or any person associated therewith, as an inducement for the award of a subcontract or order.
4. The prohibition against conflicts of interest and gratuities and kickbacks shall be conspicuously set forth in every local public agency written contract and solicitation therefor.
5. It shall be a breach of ethical standards for any public employee or former employee knowingly to use confidential information for his actual or anticipated personal gain, or the actual or anticipated personal gain of any other person.
6. All contractors, subcontractors, and employees must pass background checks prior to initial work upon grounds, and then annually. A listing of any and all employees including contractors and subcontractors to be on any school ground will be required prior to working. Any changes to this list must be updated prior to any employee or worker being on school property.

Signature

Date

References: KRS 156. 480, OAG 80-32, Model Procurement Code 45A.455

NOTE: THIS CERTIFICATE MUST BE SIGNED AND ATTACHED TO THE BID FORM IN ORDER FOR YOUR BID TO BE QUALIFIED.

References

A list of three existing customer references shall be supplied with your bid. Each of these three references will be contacted and asked "Overall on a scale of 1-10 please rank this company". The three scores shall be averaged and this average will be the bidders score. If a bidder is greater than 10 points from the lead bidder, this bidder's references shall not be contacted. Note: If a current vendor of the board of education - the board reserves the right to provide the sole score.

Company Name _____

Address _____

Phone _____

Contact _____

Email Address _____

Company Name _____

Address _____

Phone _____

Contact _____

Email Address _____

Company Name _____

Address _____

Phone _____

Contact _____

Email Address _____

**REQUIRED AFFIDAVIT FOR BIDDERS AND CONTRACTORS CLAIMING
RESIDENT BIDDER STATUS**

FOR BIDS AND CONTRACTS IN GENERAL:

The bidder hereby swears and affirms under penalty of perjury that, in accordance with KRS 45A.494(2), the entity bidding is an individual, partnership, association, corporation, or other business entity that, on the date the contract is first advertised or announced as available for bidding:

1. Is authorized to transact business in the Commonwealth;
2. Has for one year prior to and through the date of advertisement
 - a. Filed Kentucky corporate income taxes;
 - b. Made payments to the Kentucky unemployment insurance fund established in KRS 341.49; and
 - c. Maintained a Kentucky workers' compensation policy in effect.

The BIDDING AGENCY reserves the right to request documentation supporting a bidder's claim of resident bidder status. Failure to provide such documentation upon request shall result in disqualification of the bidder or contract termination.

_____ Signature	_____ Printed Name
_____ Title	_____ Date
_____ Company Name	
_____ Address	

Subscribed and sworn to before me by _____
(Affiant) (Title)

of _____ this _____ day of _____, 20____.
(Company Name)

Notary Public
[seal of notary]

My commission expires: _____

Montgomery County School District
640 Woodford Drive
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Form **W-9**
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

**Request for Taxpayer
Identification Number and Certification**

Give Form to the requester. Do not send to the IRS.

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
2 Business name/disregarded entity name, if different from above	
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ▶ _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i>
5 Address (number, street, and apt. or suite no.) See instructions.	Requester's name and address (optional)
6 City, state, and ZIP code	
7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number											
				-				-			
or											
Employer identification number											
					-						

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶	Date ▶

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.