



## **REQUEST FOR PROPOSAL**

### **Employee Leave Management and ADA Administration Services**

**RFP Publication Date: June 16, 2025**  
**Updated June 30, 2025**

**RFP Submission Deadline Date: July 7, 2025**

**Issued by:**  
Marathon County Human Resources  
1100 Lake View Drive, Suite 100, Wausau, WI 54403  
[CountyBenefits@marathoncounty.gov](mailto:CountyBenefits@marathoncounty.gov)

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### **1. RESPONDENT ADMONISHMENT**

Respondents are reminded that it is their responsibility to:

- Carefully read all the content of this entire document, address all requirements, and follow all procedures of this Request for Proposal (RFP).
- Ask for clarification before final due date of questions.
- Immediately inform the County of any problems with this solicitation.
- Be complete in response.
- Submit all responses by the required dates and times.

### **2. PUBLIC RECORDS AND CONFIDENTIAL INFORMATION**

It is the intention to maintain an open and public process in the solicitation, submission, review, and approval of procurement activities. Proposal records will not be available under an open records request prior to the award of the contract.

Any proposals submitted in conjunction with this request will become a public record and consequently, open for complete public inspection. Proposals shall not be marked confidential on each page nor may it be stated in the cover page that an entire proposal is confidential.

Information cannot be kept confidential unless it is a trade secret. Trade secret is defined in §134.90(1)(c), Wis Stats. As follows: "Trade secret" means information, including formula, pattern, compilation, program, device, method, technique or process to which all of the following apply:

- A. The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.

B. The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

### **3. INSTRUCTIONS TO VENDORS**

It is the Vendor's responsibility to inquire about and request clarification of any aspect of this RFP that is not understood. Although Marathon County has made reasonable efforts to provide accurate information in this RFP, it makes no representation, warranty, or covenant with respect to the completeness or accuracy of the information contained herein.

Vendors are encouraged to provide questions to clarify specific points contained in this RFP and to clarify desired services from Vendors.

All questions shall be directed to: [CountyBenefits@marathoncounty.gov](mailto:CountyBenefits@marathoncounty.gov)

All questions shall be submitted by June 25, 2025.

Answers to inquiries are to be provided to all Vendors, without attribution to the originating Vendor.

All answers will be posted to the county website by June 30, 2025.

Proposals may be directed to:

Marathon County Human Resources  
1100 Lake View Drive, Suite 100  
Wausau, WI 54403  
[CountyBenefits@marathoncounty.gov](mailto:CountyBenefits@marathoncounty.gov) (email added 6.30.25)

The envelope containing the proposal shall bear the name and address of the interested firm and a notation "Employee Leave Management and ADA Administration Services"

All proposals must be received at the Marathon County Human Resources Department, 1100 Lake View Drive, Suite 100, Wausau, WI 54403, or by email at [countybenefits@marathoncounty.gov](mailto:countybenefits@marathoncounty.gov) (added 6.30.25), no later than 3:00 P.M. on Monday, July 7, 2025. Proposals received after that date and time will not be accepted. Actual receipt is required to meet the submission deadline; deposit in the mail is insufficient.

Non-disclosure of the data contained within a proposal cannot be guaranteed because of Public Records Laws.

The County of Marathon reserves the right to reject in whole or in part, any and all proposals, to waive any informalities and to accept the proposal determined to be in the best interest of the County of Marathon taking into consideration past performance, price and the evaluation factors set forth in this Request for Proposal. The award of this contract shall be in compliance with Section 3.05 of the Marathon County Procurement Code.

The General Code of the County of Marathon contains various procurement policies which are applicable to this proposal procurement. The County procurement policies shall be controlling for this joint project. The policies are summarized at the end of this Request for Proposal and include prohibitions against gratuities and kickbacks.

It is anticipated that the contract for this service will be awarded as soon as July 14, 2025, with implementation as soon as practicable after award.

**4. PURPOSE AND BACKGROUND**

Marathon County is governed by a thirty-eight (38) member County Board of Supervisors, who appoint a County Administrator to oversee the delivery of a full range of governmental services, including, but not limited to, public safety, corrections, health and human services, highways, libraries, airport, parks, recreation, and forestry. Marathon County employs approximately 1300 employees (including City/County IT Commission employees for which we manage leaves), and services a constituent population estimated at 138,612 residents with an annual budget of \$182 Million.

Marathon County Government is soliciting proposals from qualified firms for Employee Leave Management and ADA Administration Services, specifically leaves considered under the Family and Medical Leave Act (FMLA) or as an accommodation under the Americans with Disabilities Act (ADA).

Marathon County employee leave administration is currently managed in-house by Human Resources. Structural changes and increasing demands within the Human Resources department have created a need for Marathon County to outsource employee leave administration. The County intends to maintain an internal Benefits Analyst as the program coordinator a primary point of contact for the selected vendor of these services.

Number of active leaves	65
Avg number of leaves per year (2023 -2025 annualized projection)	161

## **5. SCOPE OF SERVICES AND REQUIRED CONTENT OF PROPOSAL**

We are looking for vendor proposals to include taking over Employee Leave Management and ADA Administration for Marathon County. Proposals should include the extent to which vendor can accommodate the service requirements outlined below and the initial and ongoing cost for identified services.

### **Scope of Services**

- A. End – to – end FMLA Claim Administration: intake, eligibility, communications, certification, tracking including:
1. Administer Federal and Wisconsin FMLA programs. Continuously monitor and implement updates to relevant laws and guidance. Provide Human Resources staff updates on any changes prior to implementation.
  2. Ability for employees, supervisors, or Human Resources staff to request leave or report usage 24/7 via web, mobile, and phone.
  3. Ability to process inbound/outbound eligibility interface files from and to the County's Human Resources Information System and Payroll system (Workday)
  4. Issue initial FMLA claim package to employees including the required federal and/or Wisconsin notices and other ancillary information pertaining to County leave benefits.
  5. Provide a secure and dedicated system to receive protected health information (PHI) and related FMLA required documents from medical providers as well as the employee electronically.
  6. Determine FMLA eligibility by promptly and efficiently reviewing and verifying initial leave request, and/or corresponding medical certification, as applicable, in accordance with distinct eligibility criteria for Federal and Wisconsin FMLA
  7. Monitor and enforce employee deadlines for submitting medical certification. Issue timely reminders when documentation is not received by the specified due date. Clearly communicate any deficiencies in the medical certification and provide a revised deadline for submitting the missing information.
  8. Provide multiple ways that healthcare providers can return completed medical certifications 24/7 via secure and confidential web, mailing, faxing, etc.
  9. Provide notification to employees when medical certification is received.
  10. Prepare approval and denial correspondence, including start and end date of leave, type of leave, and the expected frequency and duration of the absence to employee and County. Provide decisions within five business days of receiving all required documentation for the leave.

11. Provide automated tracking of all employee FMLA requests and absences/utilization based upon the employee's regular authorized work schedule and full-time equivalent (FTE) assignment.
12. Support concurrent tracking of both Federal and Wisconsin FMLA with absences for which Income Continuation Insurance (ICI) benefits are being paid, workers' compensation absences, and absences covered by other employer policies, as applicable
13. Provide the ability for employees to report absences for intermittent FMLA claims 24/7 via web, mobile, and phone.
14. Notify employee, supervisor and Human Resources of benefit exhaustion. Clearly indicate the end date of Wisconsin FMLA and, if applicable, the remaining amount of Federal FMLA entitlement.
15. Alert the County to intermittent absences that exceed the frequency and duration specified on the medical certification. Provide options to request re-certification and second opinions as necessary and resources to help reduce intermittent leave abuse.
16. Coordination of recertification and second opinions when appropriate and necessary.
17. Coordination of return to work/ fitness for duty certifications with Human Resources Staff.

**B. ADA Tracking and Interactive Process**

1. Ensure policies and procedures align with ADA, ADAAA, and related state/local regulations.
2. Provide guidance on federal and Wisconsin disability laws, including accommodation obligations.
3. Provide a consistent method for employees to request accommodations via web, mobile, and phone.
4. Request, receive, and review medical documentation to verify disability status
5. Maintain confidentiality and secure storage of medical and disability-related records.
6. Communicate with healthcare providers (with employee authorization) to clarify functional limitations
7. Lead or support structured, documented interactive discussions between employer and employee.
8. Provide support to County Human Resources in identify and evaluate potential reasonable accommodations.
9. Follow up to confirm effectiveness of accommodations and employee satisfaction.
10. Maintain a centralized log or database of ADA accommodation requests, decisions, and timelines.
11. Offer periodic refreshers and updates on legal or procedural changes.

12. Support investigations or responses to EEOC/state agency claims related to disability discrimination.

C. Customer Service and Communication

1. Provide courteous and prompt service while treating all County employees fairly and equitably. Provide all written notices as required by federal and/or state law.
2. Use client specific correspondence and notifications approved by the County, detailing available options for employee paid and unpaid leave based on Federal and state regulations and County guidelines.
3. Provide the employee with their current County job description, and if available, statement of job requirement when a leave or ADA is requested due to their own medical condition.
4. Acknowledge within one (1) business day the receipt of any written inquiry, complaint or request from the employee, department, or County Human Resources.
5. Document all communications with employees to ensure accurate and timely response to leave requests and inquiries.
6. Transmission of eligibility notices, rights and responsibilities notice, certification of healthcare provider, optional authorization for release of medical records and information, and return to work form in accordance with federally and state regulated timeframes.
7. Staff availability to testify at administrative hearings as needed
8. Provide employees with a Customer Experience Survey, as a way to gauge the level of service provided and utilize results develop and implement changes as necessary.
9. Meet with County Human Resources during the first year according to the agreed upon schedule (i.e., initially on a weekly basis, then transitioning to biweekly, monthly or quarterly meetings as appropriate). Additionally, hold meetings on a minimum of semi-annual basis to review claims activity, program accomplishments, and identify areas for improvement.
10. Assign a designated Account Manager with responsibility and authority to take all necessary steps to ensure that County expectations are met and to solve all professional performance, invoicing complaints, and other conflicts that may arise.
11. Provide comprehensive training and educational materials on Federal and Wisconsin FMLA, as well as ADA compliance and best practices. Training must be delivered through both live webinars and prerecorded modules that can be integrated into Workday Learning with method for tracking completion.

D. Claim System and Data Reporting

1. Maintain a comprehensive claims management system and conduct continuous audits of claim file data to assure accuracy and completeness.

2. Provide the County with reliable, secure access to its system. The system must be available for access 24 hours a day, 7 days a week and include remote access capabilities.
3. Maintain confidentiality on all data collected in administration of this Contract.
4. Ensure all claim records and related data, including PHI, will be available to County upon request.
5. Ensure in the event of termination of services, all data and records necessary to administer FMLA will be transferred back to County
6. Provide detailed reports on FMLA requests, approvals, and denials, including individual utilization reports.
7. Provide required data to the Department of Labor upon request by the County
8. Provide ad hoc or annual reports on the following:
  - a. Statistical analysis of services provided including trends, usage, compliance and operational metrics.
  - b. Analysis of the County's program compared to other employers
  - c. Other information, analysis, and recommendations for the County's program

**E. Implementation and Transition**

1. Provide a detail project plan outlining key milestones and timeliness for implementation.
2. Submit sample of all correspondences and notifications to be used prior to implementation for review and approval by County Human Resources.
3. Provide the required file format specifications for integrating inbound and outbound eligibility interface files.
4. Deliver comprehensive training for all stakeholders, including County Human Resources, managers, and employees.

**Required Content of proposal:**

**A. Company background:**

1. How long have you been in business?
2. How many employees do you have?
3. How many leave management clients do you serve?
  - a. How many specifically in WI?
  - b. How many public sector employers? If any are in WI, please provide a list.

**B. Scope of services and service levels proposed:**

1. Explain the extent to which you can provide the services outlined above and the service levels you can support of these services

**C. Summary of costs:**

1. What is the estimated implementation/startup costs?
2. What are the estimated ongoing fees?

D. Reporting:

1. What types of standard reporting do you offer? Include frequency.
2. What types of ad-hoc reporting do you offer? Include potential cost.

E. Technology:

1. Explain the system capabilities, access, and security

B. Timeline for Implementation:

1. Please provide details on your implementation process and approximate timeline

6. **INTERVIEW**

Firms submitting a proposal may be scheduled for an interview on Monday, July 14, 2025, or Tuesday, July 15, 2025. The selection committee may elect to interview the three (3) firms that have scored the highest during an evaluation process. The interview with the selection committee will enable your firm to present your proposal:

- The interview will last approximately one hour. Your presentation should be limited to 30 minutes. The remaining time will be used for follow-up questions and discussion.
- The presentation will be made remotely or in one of the meeting rooms at the Marathon County Lake View Campus in Wausau, WI.
- The selection committee will be comprised of members from Marathon County Human Resources, Administration, and USI Insurance Services.

7. **SELECTION PROCESS**

The selection committee will consider the following criteria in evaluating written proposals and interview presentations:

- Professional experience providing leave management services for like organizations (30%)
- Extent to which vendor can accommodate the scope of services outlined (20%)
- Implementation Timeline (15%)
- Past record of performance in leave administration (10%)
- Costs (25%)

Receipt of proposals and subsequent award of the contract will be governed by Section 3.05 of the Marathon County Procurement Code. Marathon County will enter into discussions with the highest ranked offer or in accordance with Section

3.05 of the Marathon County Procurement Code. If the selection committee is unable to successfully conclude negotiations with the highest ranking proposer, negotiations will be held with the next highest ranking proposer. The contract shall be awarded pursuant to Section 3.05 of the Procurement Code to the proposer who is determined to be most advantageous to the County of Marathon.

### **MARATHON COUNTY PROCUREMENT POLICY**

All aspects of this Request for Proposals will be in accordance with the Marathon County Procurement Policy, Sections 3.01 through 3.16 of the General Code of the County of Marathon. A copy of the Procurement policy is available at the office of the Marathon County Clerk, Marathon County Courthouse, 500 Forest Street, Wausau, Wisconsin 54403 or online at [https://library.municode.com/wi/marathon\\_county/codes/code\\_of\\_ordinances](https://library.municode.com/wi/marathon_county/codes/code_of_ordinances).