DESCRIPTION: Provide Third-Party Benefits Enrollment and Management Services

The Term "Offer" Means Your "Bid" or "Proposal".

SUBMIT OFFER BY (Opening Date/Time): March 18, 2020 by 2:00 PM Eastern

NUMBER OF COPIES TO BE SUBMITTED: (1) Electronic PDF copy via email to lashonda.outing@richlandone.org

QUESTIONS MUST BE RECEIVED BY: N/A

SUBMIT YOUR SEALED OFFER TO THE FOLLOWING ADDRESS:

Procurement Services
201 Park Street
Room 209
Columbia, S. C. 29201

You must submit a signed copy of this form with Your Offer. By submitting a bid or proposal, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of sixty (60) calendar days after the Opening Date.

NAME OF OFFEROR (Full legal name of business submitting the offer)

AUTHORIZED SIGNATURE (Person signing must be authorized to submit binding offer to enter contract on behalf of Offeror named above.)

TITLE (Business title of person signing above)

PRINTED NAME (Printed name of person signing above)

DATE

Instructions regarding Offerors Name: Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror or above. An offer may be submitted by only one legal entity. The entity named as the Offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, i.e., a separate corporation, partnership, sole proprietorship, etc.

OFFEROR OFFICE ADDRESS

CITY

STATE

ZIP CODE

PHONE

FACSIMILE

E-MAIL

STATE OF INCORPORATION (If Offeror is a corporation, identify the State of Incorporation.)

TAXPAYER IDENTIFICATION NO. (See provision entitled Taxpayer Identification Number)
NOTICE

Solicitation No. 2020-028
Provide Third-Party Benefits Enrollment and Management Services

Amendment No. 1
Date of Issue: March 3, 2020

THE FOLLOWING INFORMATION SHALL BE INCORPORATED AS PART OF THE ABOVE MENTIONED SOLICITATION; ALL OTHER TERMS AND CONDITIONS SHALL REMAIN THE SAME:

1. Who is the current vendor for this RFP?
   Response: The current vendor is Keenan & Suggs w/Ward Services.

2. What carriers and voluntary products are currently being offered under the current vendor?

3. What is your current participation in supplemental benefits?
   Response: Participation various by products but the estimated average is 3500 employees.

4. Will the current plans be taken off payroll deduction allowing employees to maintain coverage on an individual basis?
   Response: There is no discussion to remove current plans from payroll deduction. Employees have the option of canceling coverage or self-pay.

5. Is it your expectation that the selected TPA track sick leave as it is used?
   Response: No, we do not want the selected TPA to track sick leave; however, we welcome best practices suggestions.

6. Is the District looking to enroll core and worksite benefits in the same system?
   Response: Yes, Richland One seeks to enroll core and worksite benefits in the current ERP software system, MUNIS 2018.

7. Is the District looking for COBRA services for all benefits including medical through PEBA?
   Response: Yes, The District seeks assistance with all COBRA services (initial and continuance).

8. What, if any, incentive programs are currently in place?
   Response: At this time the District does not have any incentive programs in place but welcome suggestions.

9. What, if any, retirement awareness programs are currently in place?
   Response: Richland One Human Resources discusses during New Hire Orientation, and provide workshops during months of May & June.

10. What improvements in your employee exit strategy are you looking for?
    Response: From Benefits perspective, Improvements include but not limited to ensuring all employees are aware of coverage termination date and available resources prior to termination of coverage.
11. Please clarify your expectations regarding monitoring payroll deductions for PEBA.
   **Response:** The District expects the TPA to assist with an effective method of capturing deductions and provide monthly auditing through the MUNIS system to ensure employees deduction and coverage are terminated and set-up properly.

12. Please clarify your expectations regarding on-site training for District Staff and Best Practice seminars for the effective administration of benefits programs.
   **Response:** For Benefits perspective, the District welcomes any training that may ensure employees are aware and knowledgeable of the state benefits to include upcoming trends, resources, better communication avenues, or offering a information session for current employees, i.e. or question/answer sessions.

13. Regarding the Cost Proposal: Can you provide current costs of services?
   **Response:** There is not a direct cost to the District. TPA will be compensated from voluntary coverage enrollment per employee.

14. Are there any improvements over your current services that you would like to have?
   **Response:** Yes, Richland One seeks a provide to give the best services that can monitor and effectively advise and recommend the best services; the District seeks a TPA that can offer electronic means of services when and as needed.

15. Can you provide a list of the benefits that are currently offered to employees that you would like respondents to analyze and make recommendations on? If possible, please provide the name of the carrier(s) and the approximate participant count by policy type.
   **Response:** In response to this request, the awarded vendor will view employees current voluntary benefit enrollment and determine if employee has used available resources or maybe “insurance rich.”

16. If plan changes are recommended, how would the district support any existing payroll deductions for coverage that will no longer be offered?
   **Response:** There is no discussions to change employees’ voluntary benefits enrollment. As with any vendor, the employee should have the option of continuing the coverage. Existing payroll deductions will be handled on a case-by-case basis.

17. Can you please provide clarity on the exact types of interfaces you are requesting in Question 11 in Section E (Other service requirements)?
   **Response:** The District is seeking a software solution that can capture payroll deductions for core benefits, which may require programming to upload premiums from PEBA’s Subscriber Data File to import payroll deductions into MUNIS 2018 system. The District is seeking a solution that can import core insurance premiums weekly and will include our one-month advance premium deduction.

18. Will the District provide on-site facilities for new hire enrollments throughout the year?
   **Response:** Currently, the District does not have a designated office but seeking a TPA to have a dedicated representative to meet with employees during the District’s weekly new hire orientations. The District will make the necessary arrangements in the District facilities if space permits; The District desires the TPE to have a dedicated meeting location, off-site, that can accommodate new hires enrollment throughout the year.
19. Page 13 Section III: Can you elaborate on the sentence “The District desires a vendor that shall establish a partnership with the District in offering all proposed services at no cost and serve in an advisory capacity to the District throughout the term of the contract.” How does the District propose that the vendor get paid for services?  
**Response:** The District is not providing monetary value for this service. Vendor compensation will be through employees’ enrollment for their offered product.

20. Can you provide what current voluntary products and carriers the District utilizes?  
**Response:** Vendors offer different products. But most of the vendors offers life, short term disability, and accidental coverage. Vendors included but not limited to: AFLAC, Ward Services, Washington National, and Colonial Life. Awarded vendor cannot offer coverage that will conflict with the S. C. Public Employee Benefit Authority (PEBA) and must be knowledgeable of PEBA’s TPE guidelines.

21. Can you elaborate on the District’s expectation that the vendor integrate with PEBA in regards to benefit elections and payroll deductions? What exactly does the District mean by “integrate”? Sending a change file? Or EDI file to PEBA?  
**Response:** PEBA has a New Enrollment upload file that can upload new hires for processing coverage and a Subscriber Data file that can be used to import deductions into the District MUNIS 2018.

22. When was the last time an RFP was issued for these services?  
**Response:** The last RFP issued for these services was December 18, 2015.

23. What is the overall goal and what does the District hope to accomplish by issuing this RFP?  
**Response:** The overall goal is to use a TPE that will provide customer services to Richland One employees through enrollment and ensuring employees are knowledgeable of their benefits: insurance, retirement, and other services offered by the District. Additionally, the District desires to work with the TPE for “best practices” that will improve enrollment of benefits to include but not limited to updating PEBA and updating MUNIS 2018 with insurance and retirement deductions.

24. Does the District desire to have one on one enrollment sessions with Benefit Counselors, group meetings and/or employee self-service?  
**Response:** The awarded offeror will be expected to conduct one-on-meetings, group meetings and employee self-service as requested by the District.

25. Page 13 section A #3 you reference analyzing experience trends and providing timely updates to the district. By “experience trends” do you mean utilization and claims experience on PEBA health insurance? If this is the case, will the district give the awarded offeror access to this information in order to provide the needed analysis?  
**Response:** Both PEBA and information from other sources such as the Kaiser Family Foundation. PEBA information/requirements are outlined at the following website: [www.peba.sc.gov](http://www.peba.sc.gov).
26. Page 15 #11 and 12 you reference an “electronic solution” that integrates with district system MUNIS as well as the PEBA system. Our understanding is these are unique to the district and not typical in the private sector. That being said, does the district determine which benefit management systems can integrate with district systems? If so, will the awarded party’s proposed cost-neutral benefit management system be given appropriate access to integrate with district systems upon award of contract?

**Response:** Yes the District will determine with software solution will integrate. The District reserves the right to test the proposed online solution for compatibility, then make a final determination to accept software solution. The District currently uses MUNIS V2018.1 and Frontline.

27. On Page 21, under “Fixed Pricing Required”, it says “Any pricing provided by contractor shall include all costs for performing the work associated with that price”. On pg 22, Payment schedules are referenced for services rendered. It says “Any payment for services will be made on a schedule mutually agreed upon by the Contractor and the District. All payments shall be net thirty (30) from the date of acceptance by the District. RCSD1 requires invoicing at the successful completion of each task. All invoices must be submitted in itemized detail as described in the RFP. RCSD1 reserves the right to return all invoices if not properly itemized.

However, On pg13, it states “The District desires a vendor that shall establish a partnership with the District in offering all of the proposed services at no cost and serve in an advisory capacity to the District throughout the term of the contract.” Based on information from pg. 13, and the districts’ desire for advisory services to be cost-neutral, all the itemized invoices and payments referenced on pg21 and 22 would be invoices for insurance products purchased by employees, not consulting fees charged to the district, correct?

**Response:** Language outlined on Page 21 and Page 22 is standard term clauses. There will be no cost be billed or directly linked to the District. The TPE vendor compensation is based on employees’ enrollment from the offered products.

28. Pg. 14 under “Renewal Process” #8, The offeror is instructed to provide quotes and proposals and negotiate rates. Is this request only for supplemental insurance product quotes outside the scope of PEBA health benefits, or a request for quotes on a competitive health insurance plan for consideration to replace the district’s use of PEBA health benefits in addition to supplemental insurance quotes?

**Response:** By PEBA’s rule, the TPE cannot offer a product or service that will be in conflict with PEBA’s products; therefore, the TPE must be knowledgeable of PEBA’s contract for TPE. There is no cost to the District, so no quote or negotiated rates are required.

29. Does the 60 page limit referenced on page 17 include our response to Volume II (Cost Proposal)? Would exhibits included in our response be included in the 60 page limit?

**Response:** No. No.

30. For the financial statements requested on page 18, would the District be able to sign a Non-disclosure agreement allowing our firm to provide full financial statements?

**Response:** In response to your inquiry regarding Financial Statements, offeror shall refer to Page 9 of Solicitation No. 2020-028, Submitting Confidential Information applicable to the financial statements.

31. Is the District requiring a redacted copy of our response?

**Response:** Yes, Refer to page 18, Submitting Redacted copy.
OFFEROR MUST ACKNOWLEDGE RECEIPT OF THIS AMENDMENT PRIOR TO DATE AND TIME SPECIFIED IN THE SOLICITATION, OR AS AMENDED, BY ONE OR THE FOLLOWING METHODS: (A) BY SIGNING AND RETURNING ONE COPY OF THIS AMENDMENT WITH YOUR BID; (B) BY ACKNOWLEDGING RECEIPT OF THIS AMENDMENT ON EACH COPY OF THE OFFER SUBMITTED; OR (C) BY SEPARATE LETTER OR TELEGRAM WHICH INCLUDES A REFERENCE TO THE SOLICITATION AND AMENDMENT NUMBER(S). FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE ISSUING OFFICE PRIOR TO DATE AND TIME SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. IF, BY VIRTUE OF THIS AMENDMENT YOU DESIRE TO CHANGE AN OFFER ALREADY SUBMITTED, SUCH CHANGE MAY BE MADE BY LETTER OR TELEGRAM, PROVIDED SUCH LETTER OR TELEGRAM MAKES REFERENCE TO THE SOLICITATION AND THIS AMENDMENT AND IS RECEIVED PRIOR TO DATE AND TIME SPECIFIED.

ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.