

John Gardner

From: Dustin Bishop
Sent: Wednesday, February 25, 2015 12:37 PM
To: John Gardner
Subject: RE: Can you write me a short blurb on why we are soliciting Employee Benefit and Communication Services?

This RFP will allow HCS to offer new employees one-on-one benefits counseling at the employees work location. This provides a better experience for new employees, and helps HCS maintain the privacy standards imposed by HIPPA's privacy rule. No one should be discussing health related questions in a group setting.


The RFP will also allow for improved communication during the annual October enrollment period. The selected company will schedule attendance area events for general information sessions about allowed changes and will also assist with the one-on-one meetings we currently have during this period.

Finally, the RFP will formalize the District voluntary benefit offerings. This includes short-term disability, illness specific plans, whole/universal life and long-term care (All not offered by PEBA). This will reduce the number of agent/vendors contacting Principals to request staff meetings and will provide a clear list to our employees about the offerings. As it is now, it is possible to have seven or eight vendors in a school throughout the year offering competing products to the same employees.

To offer these increased services to our employees and in lieu of increasing the HCS staff required to do so, we are following what other large counties in SC have done (Greenville, Charleston, Richland One and now Beaufort). They have all requested the services of a third party enrollee who will be listed as the exclusive agent for future voluntary benefits enrollment at no direct cost to the District. We will offer office space at the DO so they will be on-sight to perform abbreviated new-hire classes and plan for employee visits.

From: John Gardner
Sent: Wednesday, February 25, 2015 11:44 AM
To: Dustin Bishop
Subject: Can you write me a short blurb on why we are soliciting Employee Benefit and Communication Services?

John K Gardner
Chief Financial Officer
Horry County Schools
P.O. Box 260005
355 Four Mile Road
Conway, S.C. 29528
Office: 843.488.6896 Cell: 843.504.1549

 Horry County Schools	Solicitation Type:	Request for Proposals
	Solicitation Number	1415-58
	Date Issued	02/13/2015
	Procurement Officer	Darlyn B. Adams, CPPO
	Phone	(843) 488-6942
	E-Mail Address	dadams@horrycountyschools.net

DESCRIPTION: Employee Benefit Enrollment and Communication Services

USING GOVERNMENTAL: Horry County Schools

Darlyn B. Adams

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

SUBMIT OFFER BY (Opening Date/Time): 03/16/2015 at 3:30 p.m. (EST) (See "Deadline For Submission Of Offer" provision)

QUESTIONS MUST BE RECEIVED BY(Date/Time): 03/05/2015 p.m. (EST) (See "Questions From Offerors" provision)

SUBMIT QUESTIONS TO: dadams@horrycountyschools.net

NUMBER OF COPIES TO BE SUBMITTED: SEE PAGE 3

Offers must be submitted in a sealed package. Solicitation Number & Opening Date must appear on package exterior

SUBMIT YOUR SEALED OFFER TO EITHER OF THE FOLLOWING ADDRESSES BELOW:

PHYSICAL ADDRESS:

Horry County Schools
Office of Procurement Services
Attn: Denise Richardson
335 Four Mile Road Conway, South Carolina 29526

MAILING ADDRESS:

Horry County Schools
Office of Procurement Services
Attn: Denise Richardson
PO Box 260005 Conway, South Carolina 29528-6005

See "Submitting Your Offer" provision.

CONFERENCE TYPE: None-Not Applicable DATE & TIME: N/A (EST) As appropriate, see "Conferences - Pre-Bid/Proposal" & "Site Visit" provisions	LOCATION: N/A
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AWARD & AMENDMENTS	The award, this solicitation, and any amendments will be posted at the following web address: http://apps.hcs.k12.sc.us/apps/protrac/
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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 ninety (90) calendar days after the Opening Date. (See "Signing Your Offer" provisions)

NAME OF OFFEROR (Full legal name of business submitting the offer)		OFFEROR'S TYPE OF ENTITY: (Check one) <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation (tax-exempt) <input type="checkbox"/> Corporate entity (not tax-exempt) <input type="checkbox"/> Government entity (federal, state, or local) <input type="checkbox"/> Other _____ (See "Signing Your Offer" provision.)
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 SIGNED	

Instructions regarding Offeror's name: Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror 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.

STATE OF INCORPORATION	TAXPAYER IDENTIFICATION NO.
(If Offeror is a corporation, identify the state of Incorporation.)	(See "Taxpayer Identification Number" provision)

COVER PAGE HCS (JAN 2014)

The District is currently governed by a board of trustees, the Horry County Board of Education, consisting of members elected in single-member Districts with the Board Chairman elected countywide. The Horry County Board of Education members have decision-making authority, the power to designate management, the ability to significantly influence operations, and have primary accountability for fiscal matters.

PURPOSE:

It is the intent of Horry County Schools to contract with an offeror to assist the District's Benefits Office with the administration of Benefits Enrollment and Communication Services for its employees. The successful offeror will, with limited direction of the District's Benefits Administrator, conduct all open enrollment programs for the District, meet with and enroll new employees of the District, and review individually benefits of employees at their worksite. The successful offeror will be expected to work closely with the District's Benefits Administrator who will coordinate and support the work of the successful offeror to administer the District's benefit program that will include all State and District approved benefits. The successful offeror will not be permitted to offer any district employee benefits which have not been approved by the District.

Offeror must be able to provide and support the Automated Employee Benefit Enroll Service program that includes: software programs that interface with the State Employee Insurance Program (EIP) and the district's PeopleSoft payroll operating system, customer services, and enrollment counselors that can educate and enroll 5,500 benefit eligible district employees annually and approximately 300 new hires annually.

Enrollment services must include all benefits offered by the District including state, district, and voluntary plans and retirement, annuities and deferred compensation. The District is seeking proposers that can maintain the existing automated benefit enrollment services.

The district has one centralized payroll unit and all employees are paid on the same semi-monthly schedule.

It is expected that there will be no cost to the district for the services proposed. The contract will be awarded in conjunction with offering district-approved voluntary products. The current district approved voluntary products include universal life, short term disability, and cancer/critical illness. The awarded firm will be considered the agent of record for all district supplemental, voluntary products. Employees currently purchasing voluntary benefit coverage through payroll deduction will be allowed to keep their existing policies and payroll deductions. All new enrollments will be processed through the District's agent of record.

A proposal shall consist of details for the provision and management of the services detailed in the specifications noted in the solicitation, in accordance with the requirements described in the Request for Proposals. The district is particularly interested in any suggestions offered in a proposal that may enable the district to improve its current process.

SCOPE OF WORK:

It is the intent of the Horry County Schools Office of Procurement to solicit offers from qualified vendors to provide benefit and communication services for the district in accordance with all requirements stated herein. These specifications cover professional services to furnish all supervision, labor, materials, training, technical support, supplies and equipment necessary to provide the services requested.

Specifically, the district is requesting assistance with benefits enrollment and presentations and individual meetings with employees to communicate available benefits services to employees including, but not limited to, the following:

Voluntary Products

1. Provide annual review of all district supplemental products and make insurance coverage and carrier recommendations to maintain a competitive employee benefits program
2. State whether or not the offeror has access to products of multiple insurance carriers
3. Promote all aspects of the benefits program with equal emphasis on products and programs offered without preferential treatment and/or emphasis on programs and/or services approved by the district which may be offered by the offeror

4. Respond to all inquiries from insurance vendors that contact the District about voluntary products or services
5. Process voluntary payroll deductions to the correct vendor on a semi-monthly basis
6. Maintain, District approved, errors and omissions insurance

Enrollment – New Employees – On-going

1. Provide, at minimum one (1) full time counselor on a year round basis.
2. Provide additional counselors as needed during peak enrollment times for the July and August new-hire season and the October annual enrollment period.
3. Provide bi-lingual (English/Spanish) customer service call center for toll free telephone inquiries to include enrollment questions, claim filing assistance or general questions.

Enrollment/Training:

1. Conduct benefit orientation sessions and group meetings for all eligible new hires.
2. Meet individually with eligible, newly hired employees throughout the year to explain the state, district, supplemental State Retirement System, and supplemental retirement benefits.
3. Receive notification and account for eligible new hires who attend orientation and document completion of enrollment process.
4. Assist employees with completion of an automated, electronic enrollment process within thirty-one (31) days of hire. Included in process will be a combination of EIPs, EBS system, vendor system and district's self-service system. Exceptions may require regular forms.
5. Provide initial COBRA notification for new employees at enrollment time.
6. Provide district staff with all required employee enrollment documentation to establish the employee's benefit file (i.e. EBS confirmation statement and other enrollment forms).
7. Conduct supplemental employee benefit professional development throughout the year by meeting with employees individually at their worksite to discuss their current enrolled benefits and to instruct them on how to use the state's web based tool, "My Benefits".
8. Support the district's Benefits Department and help with individual employee benefit issues as needed (status changes, dependent certification issues, retirees, etc.).
9. Provide ad hoc services as required by the district.

Calendar Year Open/Annual Enrollment (October of each year)

1. Develop a schedule at each school/location for mandatory employee meetings.
2. Meet individually with all benefit eligible employees at their work location to:
3. Explain state benefit program changes and what coverage can be added or dropped during the enrollment period.
4. Educate, demonstrate and train the employee on the use of the state, "My Benefits", web based enrollment tool.
5. Initiate all state benefit changes through "My Benefits".
6. Provide employee with a confirmed Summary of change form created through the use of the "My Benefits".
7. If "My Benefits" is not accessible, the successful offeror must have a back-up, enrollment tool that complies with the state Employee Insurance Program (EIP) rules and guidelines. The tool must be able to produce a state enrollment form titled Notice of Election (NOE) form for employee signature.
8. Securely synch all enrollment data collected through vendor's enrollment system nightly to a secure server.
9. Communicate district policies, procedures, or programs as requested by district administration.
10. Track the following information for employees seen:
11. Date, time, duration of meeting, whether or not the employee made any changes, how change was made ("My Benefits" or vendor system). Changes in the vendor system will be documented as to why the change was required.
12. Voluntary, supplemental benefit changes.
13. Implement any and all Wage Works changes for medical/dependent spending and health savings accounts through the vendor's enrollment system to include a confirmation document for the employee's records. The enrollment system must provide a compliant enrollment form and enforce all eligibility/contribution rules.
14. Provide the district with any Wage Works forms on a weekly basis for the Benefits Administrator (BA) to sign and forward to Wage Works.
15. Provide the district with original NOEs produced on a weekly basis for the BA to sign and forward to EIP.
16. Use a survey tool to give each employee the opportunity to complete an anonymous, online survey evaluating his/her enrollment experience.

17. Provide the district with a summary of enrollment activity and survey results.
18. Create initial COBRA notice for all changes and deliver original notices and copies to the district's central office for distribution to employees.

IV. INFORMATION FOR OFFERORS TO SUBMIT

INFORMATION FOR OFFERORS TO SUBMIT – GENERAL: Offeror shall submit a signed Cover Page and Amendments (if applicable). Offeror should submit all other information and documents requested in this part and in parts II.B. Special Instructions; III. Scope of Work; V. Qualifications; VIII. Bidding Schedule/Price Proposal; and any appropriate attachments addressed in section IX. Attachments to Solicitations.

Offeror's Technical Proposals are to be prepared in a manner designed to provide the district with a straightforward presentation of the Offeror's capability to satisfy the requirements of the Request for Proposals. Each Section should begin a new page in the following sequence.

1. Official Proposal Form. – Page One and Two of the RFP. RFPs submitted without the completed cover pages One and Two will automatically result in the RFP being Non-Responsive.
2. Executive Summary – A business or executive summary of the Offeror's firm to include historical information. Section is limited to three pages.
3. Offeror Experience and Capabilities. – Comprehensive description of the firm's experience in providing the services as listed in the Scope of Work and required by this solicitation preferably in a school district environment.
4. Explain the firm's approach to providing objective enrollment conduct with employees and related implementation of enrollment services. Explain the firm's method of securing personal employee data; encryption of files, counselor's laptops, etc.
5. Three references should be provided using the form provided in this RFP. Reference should be for similar projects should include the name of the organization, title, telephone number, and email address of the person the district can contact that will have a working knowledge of the contract. Provide the type of service provided, dates of the service and general details regarding the services provided. Two of the references are preferred to be school districts within South Carolina.
6. Offeror Financial Capabilities. – Offeror must provide proof of D&B rating or AM Best rating. Firm must be rated A- or better.
7. Offeror Project Manager and Project Personnel. – Resumes or business experience summary of project manager, project staff, and other parties who will provide services to the district.
8. Other Information – Statement of additional services or optional services which are not requested in the RFP that are offered for the benefit of the district.

SUBMITTING REDACTED OFFERS (MODIFIED): You are required to mark the original copy of your offer to identify any information that is exempt from public disclosure. You must do so in accordance with the clause entitled "Submitting Confidential Information." In addition, you must also submit one complete copy of your offer from which you have removed any information that you marked as exempt, i.e., a redacted copy. The information redacted should mirror in every detail the information marked as exempt from public disclosure. The redacted copy should (i) reflect the same pagination as the original, (ii) show the empty space from which information was redacted, and (iii) be submitted on a CDThumb/Flash Drive. Except for the redacted information, the CD Thumb/Flash Drive must be identical to the original hard copy. Portable Document Format (.pdf) is preferred. Redacted copy must be readily accessible to copy or print by HSC.

Redacted copy must be accessible for reproduction and distribution by HCS upon request under the Freedom of Information Act. If your offer does not contain "Confidential Information", no redacted copy is required.

OFFSHORE CONTRACTING: Work that will be performed offshore by the Offeror and/or its subcontractors must be identified in the Offeror's response. For the purpose of this solicitation, offshore is defined as outside the 50 States and US territories. Offeror is to include an explanation for the following:

- (a) What type of work is being contracted offshore? _____
- (b) What percentage (%) of the total work is being contracted offshore? _____
- (c) What percentage (%) of the total value of the contract is being contracted offshore? _____
- (d) Provide a Service Level Agreement (SLA) demonstrating the arrangement between the off-shore contractor and the Offeror. Attach Service Level Agreement to this document or paste here. Data provided by the Offeror in regards to this clause is for information only and will not be used in the evaluation and determination of an award.

V. QUALIFICATIONS

QUALIFICATION OF OFFEROR: To be eligible for award of a contract, a prospective contractor must be responsible. In evaluating an Offeror's responsibility, the State Standards of Responsibility and information from any other source may be considered. An Offeror must, upon request of HCS, furnish satisfactory evidence of its ability to meet all contractual requirements. Unreasonable failure to supply information promptly in connection with a responsibility inquiry may be grounds for determining that you are ineligible to receive an award.

QUALIFICATIONS – REQUIRED INFORMATION: In order to evaluate your responsibility, offeror shall submit the following information or documentation for the offeror and any subcontractor, if the value of subcontractor's portion of the work exceeds 10% of your price (if in doubt, provide the information):

- (a) Offeror must have a minimum of five (5) years of experience in providing the services included in the Scope of Work.
- (b) Offeror must have a satisfactory record of performance from at least three (3) school districts with preferably two (2) South Carolina public school districts during the past five years. Contracts must be similar in size and scope.

The district may make such investigation as deemed necessary to determine the capability of the offeror to perform such work and reserves the right to reject any proposal if evidence indicates the offeror is not qualified to perform the contract.

SUBCONTRACTOR – IDENTIFICATION: If you intend to subcontract with another business for any portion of the work and that portion exceeds 10% of your price, your offer must identify that business and the portion of work which they are to perform. Identify potential subcontractors by providing the business' name, address, phone, taxpayer identification number, and point of contact. In determining your responsibility, the state may evaluate your proposed subcontractor(s).

VI. AWARD CRITERIA

AWARD CRITERIA – PROPOSALS (RFP): Award will be made to the highest ranked, responsive and responsible offeror whose offer is determined to be the most advantageous to the State.

COMPETITION FROM PUBLIC ENTITIES: If a South Carolina governmental entity submits an offer, the Procurement Officer will, when determining the lowest offer, add to the price provided in any offers submitted by non-governmental entities a percentage equivalent to any applicable sales or use tax. S.C. Code Ann. Regs 117-304.1 (Supp. 2004)

EVALUATION CRITERIA: All offers will be reviewed for purposes of determining responsiveness and responsibility. Any proposal which does not meet the essential requirements of the district's solicitation will be subject to disqualification. For purposes of responsibility, all information given by the offeror concerning its availability to perform fully the contract

requirements and the integrity and reliability of the proposer will be reviewed. The submission of a proposal for review does not necessarily qualify the proposer or proposal as being responsive or responsible. Failure to provide information, as requested, for use in the evaluation will cause the proposal to be disregarded.

EVALUATION FACTORS – PROPOSALS: Offers will be evaluated using only the factors stated below. Once evaluation is complete, all responsive Offerors will be ranked from most advantageous to least advantageous:

- 20% - Offeror's ability to provide services defined in the solicitation under Scope of Work
- 20% - Offeror's comprehensive approach to meeting the scope of the contract for similar sized school districts, including:
 - enrolling multiple employee benefit plan offerings
 - providing evaluation services and competitive quotes
 - presenting new-hire information to employees
- 15% - Offeror's ability to process voluntary payroll deductions to District approved vendors
- 15% - Offeror's financial capabilities to include D&B rating or AM Best rating of A- or better
- 10% - Offeror's experience and professional qualifications
- 10% - Offeror's ability to increase resources during peak enrollment times
- 10% - References

NEGOTIATIONS (RFP): The Procurement Officer may elect to make an award without conducting negotiations. However, after the offers have been ranked, the Procurement Officer may elect to negotiate price or the general scope of work with the highest ranked offeror. If a satisfactory agreement cannot be reached, negotiations may be conducted with the second, and then the third, and so on, ranked offerors to such level of ranking as determined by the Procurement Officer.

VII. TERMS AND CONDITIONS – A. GENERAL

ASSIGNMENT: No contract or its provisions may be assigned, sublet, or transferred without the written consent of the Procurement Officer.

AFFIRMATIVE ACTION: During the term of the contract, contractors will take affirmative action in complying with all federal and state requirements concerning fair employment and employment of the handicapped, and concerning the treatment of all employees, without regard or discrimination by reason of race, color, religion, sex, national origin or physical handicap. The following are incorporated herein by reference: 41 C.F.R. 60-1.4, 60-250.4 and 60-741.4.

BANKRUPTCY: (a) Notice. In the event the Contractor enters into proceedings relating to bankruptcy, whether voluntary or involuntary, the Contractor agrees to furnish written notification of the bankruptcy to Horry County Schools. This notification shall be furnished within five (5) days of the initiation of the proceedings relating to the bankruptcy filing. This notification shall include the date on which the bankruptcy petition was filed, the identity of the court in which the bankruptcy petition was filed, and a listing of all HCS contracts against which final payment has not been made. This obligation remains in effect until final payment under this Contract. (b) Termination. This contract is cancellable and subject to immediate termination by HCS upon the contractor's insolvency, including the filing of proceedings in bankruptcy.

CHOICE-OF-LAW : The Agreement, any dispute, claim, or controversy relating to the Agreement, and all the rights and obligations of the parties shall, in all respects, be interpreted, construed, enforced and governed by and under the laws of the State of South Carolina, except its choice of law rules. As used in this paragraph, the term "Agreement" means any transaction or agreement arising out of, relating to, or contemplated by the solicitation.

CONTRACT DOCUMENTS & ORDER OF PRECEDENCE: (a) Any contract resulting from this solicitation shall consist of the following documents: (1) a Record of Negotiations, if any, executed by you and the Procurement Officer, (2) documentation regarding the clarification of an offer, if applicable, (3) the solicitation, as amended, (4) modifications, if any, to your offer, if accepted by the Procurement Officer, (5) your offer, (6) any statement reflecting HCS' final acceptance (a/k/a "award"), and