

REQUEST FOR PROPOSAL THIRD PARTY ADMINISTRATOR FOR VOLUNTARY BENEFITS

I. PURPOSE

The School District of Newberry County, hereinafter referred to as "District", is seeking a firm to act as a Third Party Administrator (TPA) for Voluntary Benefits. The purpose of this agreement is to obtain proposals for comprehensive consultative and broker services for the District. In addition to the comprehensive benefits offered by the state, the District wishes to enter into a partnership with a firm whose demonstrated experience and professional expertise will assist the District in managing the voluntary benefit plans that the District offers now and in the future.

II. RECEIPT OF PROPOSALS

Proposals must be submitted in **sealed envelopes clearly marked "Third Party Administrator for the Voluntary Benefits Program"** with the company name and address. **Proposals must be received no later than 11:00 AM on Friday, April 15, 2011 at the following address:**

**Ms. Pamela H. Arrington, PHR
Executive Director of Human Resources
The School District of Newberry County
1539 Martin Street
Newberry, S. C. 29108**

The Proposal submitted is the document upon which the District will make its initial judgment regarding a Company's qualifications, understanding of the District's scope and objectives, methodology, and ability to complete services under the contract.

Those companies submitting Proposals do so entirely at their own expense. There is no expressed or implied obligation by the School District of Newberry County to reimburse any firm or individual for any costs incurred in preparing or submitting Proposals, preparing or submitting additional information requested by the District, or for participating in any selection interviews.

Submission of any Proposal indicates acceptance of the conditions contained in the RFP, unless clearly and specifically noted otherwise in the Proposal.

The School District of Newberry County reserves the right to reject any and all Proposals, in whole or in part, submitted in response to its RFP.

The School District of Newberry County reserves the right to waive any and all informalities and to disregard all non-conforming, non-responsive or conditional Proposals.

The School District of Newberry County may, at any time, by written notification to all vendors, change any portion of the RFP described and detailed herein.

During the evaluation of Proposals, the District may require clarification of information or may invite vendors to an oral presentation to amplify and/or validate Proposal contents.

III. TECHNICAL REQUIREMENTS/SCOPE OF WORK

1. Assist in coordinating the development, promotion and administration of the Voluntary Benefits Program for the School District of Newberry County.
2. Provide one common billing to the District that includes all volunteer benefits.
3. Assist in reconciling the bill on a monthly basis.
4. Conduct meetings with new hires and current staff at various District locations to explain all options under the voluntary Benefits Program.
5. Conduct annual visits to assist employees in annual and open enrollments; coordinate with locations and announce schedule.
6. Provide neat, consistent, and accurately completed paperwork.
7. Follow-up with employees to ensure decisions are made in a timely manner regarding different benefits offered.
8. Provide a toll-free telephone number for enrollments, claims and/or questions.
9. Provide cost/benefits analysis for employees regarding insurance policy benefits and the applicable premiums.
10. Contractor shall be responsible for providing accurate and timely information which interfaces with District software.
11. If requested by the District, periodically review, with the District and each carrier, the insurance plans being offered to the employees as part of the Voluntary Benefits Program.
12. Act as a Broker of Record for the District to determine the best voluntary products from the best companies in connection with any insurance products underwritten by private insurance companies (specifically excluding the State of South Carolina Health Insurance Program) and offered to the employees as part of the Voluntary Benefits Program.
13. Take responsibility for the supervision and direction of the work performed by contractor's employees.

IV. PROPOSAL FORMAT REQUIREMENTS

1. Limit to five (5) printed pages.
2. Provide a brief history and description of your firm. This information must include the number of staff and general areas of expertise of your firm. Please provide relevant financial information on your firm.
3. Submit experience in similar projects.
4. Submit the names of the persons who will be authorized to make representations for your firm, their titles, addresses and telephone numbers.

5. Submit the name, experience, training, and qualifications of key personnel to be assigned to the contract (with titles). This information is to include, but not limited to, brokers, sales representatives, account manager and internal staff. Do they work on commission?
6. Provide three (3) references. The District reserves the right to contact other references that may not be listed.
7. Provide a list of all current clients. Identify new clients for which you have been providing services for the past twenty-four (24) months. The client list should include the following: Company name, mailing address, contact name, telephone number, project scope, project value, and dates of service.
8. Submit a list of all school district or governmental clients. State where you have made improvements and saved dollars, if applicable.
9. List any clients lost during the last three (3) years, including any school district or government clients. State the reason for loss of business.
10. Give a description of your firm's proposed method of compensation and would your firm make documentation of the commissions (if applicable) received for this account available to the District?
11. List failed projects, suspensions, debarments, and significant litigation

V. QUALIFICATIONS

To be eligible for award of contract, a prospective Contractor must be responsible. The factors to be considered in determining whether the District standards of responsibility have been met include whether a prospective contractor has:

1. The appropriate financial, material, equipment, facility, and personnel resources and expertise available, or the ability to obtain them, necessary to indicate its capability to meet all contractual requirements.
2. A satisfactory record of performance.
3. A satisfactory record of integrity.
4. Qualified legally to contract with the District and the state of South Carolina.
5. Supplied all necessary information in connection with the inquiry concerning responsibility.

VI. EVALUATION FACTORS

Offerors 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.

1. Company background and professional qualifications.
2. Ability to offer a competitive range of product quotes.
3. Complete response to all required response items.
4. Structure of proposed compensation method.

5. Comprehensiveness of proposal in meeting the District's needs.
6. Ability to provide all services specified at no cost to the District.
7. Financial strength and capacity.
8. Industry and program experience.
9. Expertise with engagement of similar scope and complexity.
10. Innovative use of current technologies and quality results.
11. Reliability of delivery and implementation schedules.

VII. ORAL PRESENTATIONS

During the evaluation process, the District may, at its discretion, request one or all firms to make oral presentations. Such presentations will provide firms with an opportunity to answer any questions the District may have on a firm's proposal. Not all firms may be asked to make such oral proposals.