



R-19/20-10

SECTION 125 PLAN ADMINISTRATION (HEALTH CARE, DEPENDENT CARE, PREMIUM PRE-TAX, LIMITED) AND HEALTH REIMBURSEMENT ARRANGEMENT SERVICES

Issue Date: 5/6/2020

Questions Deadline: 5/27/2020 12:00 PM (CT)

Response Deadline: 7/1/2020 03:00 PM (CT)

Contact Information

Contact: Heather Falls

Address: Purchasing

702 SE 291 Highway

Lee's Summit, MO 64063-4306

Event Information

Number: R-19/20-10
Title: SECTION 125 PLAN ADMINISTRATION (HEALTH CARE, DEPENDENT CARE, PREMIUM PRE-TAX, LIMITED) AND HEALTH REIMBURSEMENT ARRANGEMENT SERVICES
Type: Request for Proposal
Issue Date: 5/6/2020
Question Deadline: 5/27/2020 12:00 PM (CT)
Response Deadline: 7/1/2020 03:00 PM (CT)
Notes: The Lee's Summit R-7 School District is soliciting proposals for providing plan administration services for its Section 125 and Health Reimbursement Arrangement plans. This contract will include but is not limited to: Section 125 and health reimbursement arrangement plan administration services for eligible employees, their dependents, retirees, their dependents and former enrollees who are continuing coverage under COBRA. "Value added" services that assist the District in measuring the quality and cost of care provided to participants, plan analysis and other administrative services are expected to be included in the pricing. Lee's Summit R-7 School District (or the "District") is requiring proposers to submit their proposals electronically. Lee's Summit R-7 School District will not accept proposals that are submitted via email or fax machine. The District reserves the right to accept or reject any and all proposals and to waive any formalities or technicalities if deemed in the best interest of the District. It is the responsibility of all responders to review the entire proposal, seek clarification of any item or requirement that may not be clear, and check all responses for accuracy before submitting a response.

If you are having difficulty submitting electronically, please contact Heather Falls at heather.falls@lsr7.net for instructions.

It is the responsibility of interested firms to check <https://lsr7ebid.ionwave.net> for any addendums or notices of information prior to the opening date and time of this RFP.

Billing Information

Address: 301 NE Tudor Rd
Lee's Summit, MO 64086-5702
Phone: (816) 986 x1000

Bid Attachments

General Terms & Conditions for RFPs, RFQs and Bids.pdf

General Terms & Conditions

[Download](#)

1_- _Sample_Insurance_Certificate.pdf

Certificate of Insurance

[View Online](#)

3_- _E-Verify-LSR7_(1) (1).pdf

E-Verify

[View Online](#)

4 - MO Tax Exemption Certificate.pdf

[View Online](#)

Missouri Tax Exemption Certificate

FORM NO. 1 CONTRACTS TERMINATED FOR DEFAULT (WITHIN LAST 5 YEARS).docx

[Download](#)

FORM NO. 1 CONTRACTS TERMINATED FOR DEFAULT (WITHIN LAST 5 YEARS)

FORM NO. 2 QUESTIONNAIRE FOR SECTION 125 (FSA) SERVICES.docx

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FORM NO. 2 QUESTIONNAIRE FOR SECTION 125 (FSA) SERVICES

FORM NO. 3 QUESTIONNAIRE FOR HEALTH REIMBURSEMENT ARRANGEMENT (HRA) SRVS.docx

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FORM NO. 3 QUESTIONNAIRE FOR HEALTH REIMBURSEMENT ARRANGEMENT (HRA) SRVS

FORM NO. 4 ADDITIONAL QUESTIONS FOR PLAN ADMINISTRATION SERVICES.docx

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FORM NO. 4 ADDITIONAL QUESTIONS FOR PLAN ADMINISTRATION SERVICES

Bid Attributes

1 Introduction

The Lee's Summit R-7 School District is soliciting proposals for providing plan administration services for its Section 125 and Health Reimbursement Arrangement plans. This contract will include but is not limited to: Section 125 and health reimbursement arrangement plan administration services for eligible employees, their dependents, retirees, their dependents and former enrollees who are continuing coverage under COBRA. "Value added" services that assist the District in measuring the quality and cost of care provided to participants, plan analysis and other administrative services are expected to be included in the pricing. Lee's Summit R-7 School District (or the "District") is requiring proposers to submit their proposals electronically. Lee's Summit R-7 School District will not accept proposals that are submitted via email or fax machine. The District reserves the right to accept or reject any and all proposals and to waive any formalities or technicalities if deemed in the best interest of the District. It is the responsibility of all responders to review the entire proposal, seek clarification of any item or requirement that may not be clear, and check all responses for accuracy before submitting a response.

2 Instructions to Respondents (IMPORTANT)

1. All questions regarding this RFP shall be submitted online via the "Questions" tab of this bid opportunity. The District reserves the right to reject any and all proposals, to waive technical defects in proposals, and to select the proposal(s) deemed most advantageous to the District.
2. It is the responsibility of each respondent before submitting a proposal to examine the documents thoroughly and request written interpretation or clarifications soon after discovering any conflicts, ambiguities, errors, or omissions in the proposal documents.
3. Requests for clarification must be submitted online via the "Questions" tab. Changes to the specifications will not be allowed except by written addendum issued by the District through this online procurement system. Oral explanations or instructions given prior to award will not be binding.
4. Respondent shall quote net costs of all goods and services requested and all quotes shall include all transportation to destination and inside delivery.
5. There will be no public opening of the proposals.
6. Acceptance of this proposal or any part thereof, in writing, within ninety (90) days after the closing date, by the District shall constitute a legal and binding agreement; wherein, the vendor shall furnish the services in accordance with the specifications and offeror's proposal on the written order of the District.
7. The District reserves the right to award this contract in its entirety or to split the contract among bidders, whichever is in the best interest of the District. The District may accept any item or group of items of the bid unless qualified by specific limitation of the bidder.
8. To be considered, a firm must have experience providing Section 125 and Health Reimbursement Arrangement plan administration services. The firm should be able to demonstrate successfully implemented and maintained similar services in at least three employers of comparable size and scope.

Submit the correct number of signed copies of the proposal and bind them in 3-ring binders or plastic binding combs that can be easily removed. DO NOT use wire or metal binding. The proposal must be organized using the

following format:

- a. Title Page
- b. Letter of Transmittal for Request for Proposal
- c. Addenda – (if applicable)
- d. Provider Profile –Lead Firm(s) – Joint Venture Partners
- e. Firm Personnel Profile
- f. Experience and References.
- g. Form 1: Contract Terminated for Default (Can be found in Attachments tab)
- h. Form 2: Questionnaire for Section 125 (FSA) Services (Can be found in Attachments tab)
- i. Form 3: Questionnaire for Health Reimbursement Arrangement (HRA) Services (Can be found in Attachments tab)
- j. Form 4: Additional Questions for Plan Administration Services (Can be found in Attachments tab)
- k. Summary/Cost (Can be found in Line Items tab)

Proposals must be completed as instructed. **A total of four (4) signed proposals must be submitted along with an equal number of each signed addenda (if applicable). Proposals received that do not include all required documents and signatures may be considered non-responsive.**

Proposals shall be sent to:
ATTN: Heather Falls
702 SE 291 Hwy
Lee's Summit, MO 64063-4306

CONFLICT OF INTEREST

The successful respondent shall not have conflicts of interest as to revenues derived from the results of tests or recommendations made on behalf of the firm.

I have read and understand.
(Required: Check if applicable)

3 SELECTION PROCESS

The proposals will be evaluated by a District Selection Committee (DSC) comprised of selected District personnel. The overall process may consist of two steps: the first being a review and evaluation of all responsive proposals and the second being the interview phase for the short list of respondents selected for interview, if applicable.

Step One: Evaluation of Proposals

Members of the DSC will review and rate each responsive proposal based on the following criteria:

- a. The firm's experience in providing similar services to employers of similar size during the past five (5) years.
- b. Key personnel assigned to the District's project, and their experience with similar projects.
- c. Applicable resources offering quality assurances/quality control procedures; as well as adequacy of team/resources to complete the services.
- d. Project approach including implementation schedule/plan, detailed approach to provide services requested, technology and other resources available to participants, identification of unique issues related to the services requested, and the process proposed for communications with District staff and Board of Education.
- e. Cost

The Proposal Ranking Sheet for the evaluation of the proposals is included as Enclosure 1 to this section. The DSC may request additional submittals.

Step Two: Interviews

Members of the DSC may conduct interviews for the short list or respondents selected, if they feel that it is warranted.

Negotiation

Upon selection of the top rated company, the District will negotiate the specific terms of the contract including final over unit cost and delivery schedule.

RESPONDENT COST TO DEVELOP PROPOSAL

All costs for preparing and submitting proposals in response to this RFP are to be the responsibility of the respondent and will not be chargeable in any manner to the District.

4 Responding to Attributes

There are attributes, including this one, associated with this proposal. Some are notes and require no response, but most have a required response. **Please select each page from the bottom right-hand side of this list of attributes in order to view the next page of Bid Attributes.**

5 Attachments Required

Be sure to upload all required documents and forms to the "Response Attachments" Tab.

6 Purchase Agreements

Purchase Agreements shall be awarded in accordance with regulations adopted by the Lee's Summit R7 Board of Education and adhere to all applicable purchasing policies. Purchase Agreements will be negotiated with the lowest responsible bidder who meets the qualifications for quality, price, terms of bid, lead time, and determined to be in the best interest of the District. The bid award will be at the sole discretion of the District. The District reserves the right to reject any and all bids in part or in whole, and to accept the bid that is in the best interest of the District.

I have read and understand.

(Required: Check if applicable)

7 Terms of This Bid

The terms of this bid shall remain in effect for at least one year from date of award. The District may make additional purchases at the itemized price listed in the bid packet for a period of one (1) year. The District may, at its option, renew the Contract for up to two (2) additional one-year contract periods by giving written notice to the supplier. All prices MUST remain firm. Services will begin on January 1, 2021.

I have read and understand.

(Required: Check if applicable)

8 Bid Pricing

Prices shall be fixed with minimum adjustments allowed. If the bidder is awarded an agreement under this bid solicitation, the prices proposed by the bidder shall remain fixed for a period of one hundred eighty (180) days after the issuance of an initial purchase order or District Mastercard P-Card purchase, regardless of market conditions. After this period, the vendor may submit a price adjustments to the District based on a Manufacturer's Revised Published Price List. The request MUST contain a written notification from the manufacturer to the supplier or vendor of price increases. The Revised Published Price List or manufacturer's notification shall be submitted to the District at least thirty (30) calendar days prior to the effective date of the new price to be charged to the District. It shall be understood that such price adjustments shall not exceed the amount passed onto the supplier or vendor by the manufacturer. It shall be further understood that the District reserves the right to reject any price adjustments submitted by the bidder and/or to terminate the contract with the bidder based on such price adjustments.

The successful bidder(s) must agree to accept the District's Purchase Order or the District's Mastercard P-card for the work order. These purchases are tax exempt.

The Lee's Summit R7 School District will review all bid submissions with regards to pricing, product performance, equipment features, references and experience. The District plans to award the bid within 60 days after the bid opening.

I have read and understand.

(Required: Check if applicable)

9 Communications Statement

Communications: Contact between vendors and Lee's Summit R7 personnel during the proposal process or evaluation process is prohibited. Any attempt by vendors during the proposal process to contact Lee's Summit R7 personnel may result in disqualification. All communication shall go through the Procurement and Contracts Department during this competitive process. All questions received and the corresponding answers will be distributed to all bidders. No verbal responses will be provided. The deadline for questions about this proposal is stated in the Bid Activities and the district will not respond to questions after this time and date. Response to questions will be posted in the form of an addendum to this proposal. The vendors will be responsible for checking the website for any posted addenda.

I have read and understand.

(Required: Check if applicable)

10 General Terms and Conditions

I have downloaded and read the General Terms and Conditions from the ATTACHMENTS tab. By selecting this box, I agree to the terms and conditions.

I have read and agreed to the T&C

(Required: Check if applicable)

PROPOSAL REQUIREMENTS

The District is seeking Section 125 and health reimbursement arrangement plan administration services for eligible employees, their dependents, retirees, their dependents and former enrollees who are continuing coverage under COBRA. "Value added" services that assist the District in measuring the quality and cost of care provided to participants, plan analysis and other administrative services are expected to be included in the pricing. The District has approximately 2,700 full time employees, and approximately 300 retirees who are eligible to participate in its group programs. Historically, less than one percent of retirees participated in the Section 125 plan after retirement.

Current census data is as follows: Health Reimbursement Arrangement: 232 participants with an annual contribution by the District of approximately \$361,000; Medical FSA: 102 participants with an annual election of approximately \$127,300; Dependent Care FSA: 69 participants with an annual election of approximately \$253,800 and Limited FSA: 29 participants with an annual election of approximately \$29,200.

The District does not allow an annual rollover amount for the FSA and a participant's HRA balance cannot exceed \$4,999. The District does allow a participant who elects a Health Savings Account or a non-High Deductible Health plan to convert their HRA to a Limited HRA the following plan year. Participants with a Limited HRA may request reimbursements until the balance is exhausted or the last day of the calendar year in which employment ends, whichever is earlier. Moreover, if a participant with a Limited HRA later elects to cease contributions to a Health Savings Account or enrolls in a District High Deductible Health plan, the participant may reconvert their Limited HRA into a regular HRA.

The contract will have an annual termination clause with an annual renewal option, at the District's discretion for a period of up to two (2) additional one (1) year periods, not to exceed a total of three (3) years for the entire contract period. Services will begin on January 1, 2021.

I have read and understand.
(Required: Check if applicable)

1
3

Services

Nature of Services: The services required include, but are not limited to administration of the District's Section 125 Plan services for employee health expenses, dependent care expenses, limited dental/vision expenses and health reimbursement arrangement. Additional details will be obtained from the information provided in Forms 5 and 6.

Independent Vendor: The relationship of the service provider to the District shall be that of an independent vendor. Neither the service provider nor any of its employees shall be held or deemed in any way to be an agent, employee or official of the District.

Assignment and Subcontracting: The service provider shall not assign or subcontract the work, or any part thereof.

Termination:

The District, upon written notice, may terminate this contract, or any part thereof, as a result of the service provider's failure to render to the satisfaction of the District, the material, work and/or services required of it, including progress of the work and such abandonment or termination shall not be deemed a breach by the District. The District shall be the sole determinant in all termination for cause issues. The service provider shall not be entitled, nor shall the District give any consideration to claims for this contract, or any part hereof, by the District for cause. Such termination may come about for the sole convenience of the District. Upon receipt of written notification from the District that this contract or any part hereof, is to be terminated, the service provider shall immediately cease operation of the work stipulated. The service provider and District's evaluation shall be entitled to just and equitable payment in accordance with this contract for any uncompensated work satisfactorily performed prior to such notice.

If written notice of termination is provided due to issues unrelated to breach, or service issues previously reported in writing to Service Provider, Service Provider reserves the right to meet with the District to review terms and conditions of agreement, determine the nature of the issue(s) causing the written notice of termination, and attempt to resolve outstanding issues in an effort to continue the agreement. In the event that resolution of outstanding issues cannot be achieved within five (5) working days, the written notice of termination will remain in effect, and the contract will be terminated at the completion of thirty (30) days.

(Optional: Maximum 4000 characters allowed)

SPECIFIC REQUIREMENTS OF RFP:

1. The district reserves the right to negotiate this contract for two (2) additional one-year renewal periods.
2. If the selected service provider requests an increase in compensation for any renewal period, the service provider shall notify the District no less than thirty (30) days prior to the end of the contract period and shall provide evidence to the satisfaction of the District of increased costs incurred by the service provider for any element of the RFP for which an increase is requested.
3. The District shall notify the service provider in writing of the intent to exercise the renewal option. However, failure to notify the vendor does not waive the District's right to exercise the renewal option.
4. Evaluation: This contract may or may not be awarded to more than one service provider based on all relevant considerations including, but not necessarily limited to: experience and qualifications, experience providing similar services, services available, reporting capabilities, technology-related capability, customer service experience, financial stability, ability to perform services required and any other evaluative aspect which may impact this contract. The successful provider's first and major concern shall be compliance with applicable requirements, administration of the various plans and customer service to District staff. An example of the evaluation score sheet is attached to this RFP for your reference.
5. Work Authorization Affidavit: As a condition for the award of any contract in excess of five thousand dollars (\$5,000), the vendor or business entity, as defined in § 285.530, RSMo, shall, by sworn affidavit affirming that it does not knowingly employ any person who is an unauthorized alien and provision of documentation, affirm its enrollment and participation in a federal work authorization program with respect to the employees working in connection with this contract. The required documentation must be from the federal work authorization program provider.
6. The Department of Homeland Security, U.S. Citizenship and Immigration Services, (USCIS) in partnership with the Social Security Administration (SSA) operate an FREE internet-based program called E-Verify that allows employers to verify the employment eligibility of their employees, regardless of citizenship. Based on information provided by employees on their Form I-9, E-Verify checks the information electronically against records contained in DHS and Social Security Administration databases. There are penalties for employing an unauthorized alien, including suspension of the vendor's business license, termination of the contract, and debarment from work for a period of three years or permanently, and withholding 25% of the total amount due the contractor.
7. Purchase Agreements shall be awarded in accordance with regulations adopted by the Lee's Summit R7 Board of Education and adhere to all applicable purchasing policies. Purchase Agreements will be negotiated with the lowest responsible bidder who meets the qualifications for quality, price, terms of bid, and service, and determined to be in the best interest of the District. The RFP award will be at the sole discretion of the District. The District reserves the right to reject any and all bids in part or in whole, and to accept the proposal that is in the best interest of the District.
8. Respondents are expected to bid on the equipment item as listed on the Equipment Specifications List. If there are any deviations from the specifications listed, the respondent is expected to make note on the bid form. The District reserves the right to determine the successful respondent and will make that decision based on the best interest of the District. (not needed for service)
9. Prices shall be fixed with minimum adjustments allowed. If the respondent is awarded an agreement under this RFP solicitation, the prices proposed by the respondent shall remain fixed for a period of one hundred eighty (180) days after the issuance of an initial purchase order or District Visa P-Card purchase, regardless of market conditions. After this period, the vendor may submit a price adjustments to the District based on a Manufacturer's Revised Published Price List. The request MUST contain a written notification from the manufacturer to the supplier or vendor of price increases. The Revised Published Price List or manufacturer's notification shall be submitted to the District at least thirty (30) calendar days prior to the effective date of the new price to be charged to the District. It shall be understood that such price adjustments shall not exceed the amount passed onto the supplier or vendor by the manufacturer. It shall be further understood that the District reserves the right to reject any price adjustments submitted by the respondent and/or to terminate the contract with the respondent based on such price adjustments.
10. The successful respondent(s) must agree to accept the District's Purchase Order or the District's Mastercard P-card for the order. These purchases are tax exempt.

1
5 **Schedule of RFP Process**

Timeline for RFP Process:

The timeline listed below is the District’s estimation of time required to complete the RFP process. All efforts shall be made to abide by this schedule; however, it is subject to change.

RFP Notification	May 6, 2020
Deadline for Questions	May 27, 2020 @ 12:00 PM
Receive Proposals	July 1, 2020 @ 3:00 PM
Meet to review	Week of July 13, 2020
Interviews (if needed)	July 23, 2020
School Board	August 20, 2020 (date to be confirmed @ May 21, 2020 Board meeting)
Notice to Proceed	August 21, 2020 (date to be confirmed after May 21, 2020 Board meeting)
Implementation Period	August – December, 2020
Services Begin to Participants	January 1, 2021

Timeline of New Policies:

The District desires contract to commence January 1, 2021

1
6 **No Deviations or Exceptions**

Bidders are expected to bid on the items as listed on the Equipment Specifications List, or Scope of Work. If there are any deviations from the specifications or scope of work listed, the bidder is expected to make note, along with a brief description in the next below. The District reserves the right to determine the successful bidder and will make that decision based on the best interest of the District.

I have read and agree.
(Required: Check if applicable)

1
7 **Deviations and Exceptions**

If your company intends to deviate from the Specifications listed in the attached documents, all such deviations and exceptions must be listed here, with complete and detailed conditions and information included. The District will consider any deviations or exceptions in its bid award decisions. The District reserves the right to accept or reject any proposals based upon any deviations indicated below.

If none, please enter N/A (Not Applicable).

(Required: Maximum 4000 characters allowed)

**1
8** Cooperative Procurement with Other Jurisdictions

This section is optional; it will not affect the agreement.

1) Sales will be made in accordance with the prices, terms, and conditions of the Request for Proposals and any subsequent term agreement.

2) There shall, however, be no obligation under the cooperative procurement agreement for any organization represented by MACPP or MARC to utilize the proposal or agreement unless they are specifically named in the Request or Proposals as a joint respondent.

3) All sales to other jurisdictions will be made on purchase orders issued by that jurisdiction. All receiving, inspection, payments and other agreement administration will be the responsibility of the ordering jurisdiction.

4) Each jurisdiction that is a party to the joint proposal has authority to act as Administrative Contracting Officer with responsibility to issue purchase orders, inspect and receive goods, make payments and handle disputes involving shipment to the jurisdiction.

If the District awarded you the proposed agreement, would you sell under the prices and terms of this agreement to any public school district or any other non-profit organization having membership in the Mid-America Council of Public Purchasing (MACPP) or Mid-America Regional Council (MARC) and located within the greater Kansas City metropolitan trade area? (All deliveries shall be F.O.B. Destination and there shall be no obligations on the part of any member of said Council to utilize this agreement).

Yes No

(Optional: Check only one)

**1
9** Consultant Profile

CONSULTANT PROFILE

**2
0** Lead Consultant Name

Enter the Lead Consultant Firm(s) (or Joint Venture) name.

(Required: Maximum 1000 characters allowed)

**2
1** Lead Consultant Address

Enter the Lead Consultant Firm(s) (or Joint Venture) address.

street
city, state zip

(Required: Maximum 4000 characters allowed)

2
2 **Lead Consultant Provider**
Please designate the service area provided by the lead consultant.
 Local Regional National
(Required: Check only one)

2
3 **Year Provider Firm Established**
Please enter the year the provider's firm was established.

(Required: Numbers only)

2
4 **Years of Experience**
Please enter the number of years of experience providing this service.

(Required: Numbers only)

2
5 **Licensed in Missouri**
Are you licensed to do business in the State of Missouri?
 Yes No
(Required: Check only one)

2
6 **Principal Contact**
Please provide name, title, telephone number and email address of Principal contact

(Required: Maximum 4000 characters allowed)

2
7 **Address of Office to Perform Work**
Please provide address of office to perform work if different than Lead Consultant Firm address.

(Optional: Maximum 4000 characters allowed)

2
8 **Number of Persons Committed to District's Project**
Please list the number of persons by discipline that your Firm/Joint Venture will commit to the District's project

(Required: Numbers only)

29 **Joint Venture Areas of Responsibility**
If submittal is by Joint Venture or utilizes subcontractors, list participating firms/providers and outline specific areas of responsibility (including administrative and technical) for each firm.

(Optional: Maximum 4000 characters allowed)

30 **Has This Joint Venture Previously Worked Together?**
Has This Joint Venture Previously Worked Together?
 Yes No
(Optional: Check only one)

31 **Key Outside Consultants**

Key Outside Consultants

(Optional: Maximum 1000 characters allowed)

32 **Subcontractor #1 Name**
Please provide name of Subcontractor.

(Optional: Maximum 1000 characters allowed)

33 **Subcontractor #1 Address**
Please provide address of Subcontractor.

(Optional: Maximum 1000 characters allowed)

34 **Specialty/Role with this Project**
Provide Subcontractors Specialty/Role with this Project.

(Optional: Maximum 1000 characters allowed)

35 **Worked with Lead Firm Before?**
Worked with Lead Firm Before?
 Yes No
(Optional: Check only one)

36 **Year Firm Established**
Year Firm Established

(Optional: Numbers only)

37 **Years of Experience**
Please provide number of years experience providing this service.

(Optional: Numbers only)

38 **Subcontractor #2 Name**
Please provide name of subcontractor #2.

(Optional: Maximum 1000 characters allowed)

39 **Subcontractor #2 Address**
Please provide address of subcontractor #2

(Optional: Maximum 1000 characters allowed)

40 **Specialty/Role with this Project**
Please provide subcontractors specialty/role with this project

(Optional: Maximum 1000 characters allowed)

41 **Worked with Lead Firm Before?**
Has this Subcontractor worked with the lead firm before?
 Yes No
(Optional: Check only one)

42 **Year Firm Established**
Please provide year Subcontractors firm was established.

(Optional: Numbers only)

43 **Years of Experience**
Please provide subcontractors number of years of experience.

(Optional: Numbers only)

4 4	Resume of Key Personnel <p style="text-align: center;">Resume of Key Personnel</p> <hr/> <hr/> <hr/> <p><i>(Optional: Maximum 1000 characters allowed)</i></p>
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4 5	Name of Key Personnel Provide name of key persons, specialists, or certified staff that shall be assigned to the District's project. <hr/> <hr/> <hr/> <p><i>(Optional: Maximum 1000 characters allowed)</i></p>
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4 6	Title of Key Personnel Provide job title of key personnel assigned to District's project. <hr/> <hr/> <hr/> <p><i>(Optional: Maximum 1000 characters allowed)</i></p>
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4 7	Assignment Experience of Key Personnel: Provide previous or current assignment of key personnel related to this service. <hr/> <hr/> <hr/> <hr/> <hr/> <p><i>(Optional: Maximum 4000 characters allowed)</i></p>
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4 8	Name of Firm with which Associated Experience of Key Personnel: Provide name of firm which assignment was/is associated with. <hr/> <hr/> <hr/> <hr/> <hr/> <p><i>(Optional: Maximum 4000 characters allowed)</i></p>
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4 9	Years of Experience with this Firm Please provide assigned key personnel's experience with this firm. <input type="text"/> <p><i>(Optional: Numbers only)</i></p>
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50 **Years of Experience with Other Firms**
Please provide assigned key personnel's experience with other firms.

(Optional: Numbers only)

51 **Education**
Degree(s) or Certification(s)/Year/Specialization

(Optional: Maximum 4000 characters allowed)

52 **Current Registration(s)**
Please provide current registration(s)

(Optional: Maximum 4000 characters allowed)

53 **Other Experience & Qualifications**
Please provide other Experience & Qualifications relevant to the proposed project

(Optional: Maximum 4000 characters allowed)

54 **PROPOSAL SCORING CRITERIA**
PROPOSAL SCORING CRITERIA

55 **Evidence of Experience & References with Similar Accounts (Ref & Exp) Evaluation Criteria**
Evidence of Experience & References with Similar Accounts (Ref & Exp)
Consider experience and references listed by the firm/provider. Is the firm/provider experienced in providing services similar to that requested in this RFP?
- Familiarity and experience with similar projects.
- Consider the number of years of experience the firm/provider has.
- Consider the number of years the firm has been in business.
- Consider the references given by the firm/provider.

5 **Applicable Resources (Personnel Qualifications)**

6 **Evaluation Criteria**

Applicable Resources (Personnel Qualifications)

Evaluate the extent of applicable resources available to the provider to execute the contract.

- Adequacy of proposed number of staff for the district's need.
- Consider experience of person(s) assigned to service the district's contract.
- Consider the qualifications of the staff proposed.

5 **Approach and Understanding of Scope**

7 **Evaluation Criteria**

Approach and Understanding of Scope

Evaluate the provider's approach to and understanding of the scope of services required in the RFP as evidenced by the vendor's proposal:

- Detailed approach is reasonable /responsive to District's needs.
- Identify/recognize critical or unique issues specific to the project.
- Unique approaches that have been successful elsewhere.

5 **Cost**

8 **Evaluation Criteria**

Cost

Determination of cost and pricing data:

- The District will review and evaluate any/all proposals for the cost to the District.

59 Project Narrative

Include a two paragraph executive summary of rationale describing why your firm should be selected by the District.

(Optional: Maximum 4000 characters allowed)

60 Experience/References

EXPERIENCE/REFERENCES

(Optional: Maximum 1000 characters allowed)

61 How many years has your company been in business?

(Required: Numbers only)

62 References

List multiple references and prior experience; preferably with other school districts or governmental agencies, in the last 3 – 5 year period; work or services in the same type and size to the project being proposed. Please list the following information for each school district:

63 Reference 1

Reference 1

64 Reference #1 Contact Person's Name and Title

(Required: Maximum 1000 characters allowed)

65 Reference #1 - Contact Person's School District/Business

(Required: Maximum 1000 characters allowed)

66 Reference #1 Address

Enter Street address, city, state, zip code

(Required: Maximum 1000 characters allowed)

67 Reference #1 Phone Number
 (____) ____ - ____ ext:
(Required)

68 Reference #1 Email

(Required: Email address)

69 Reference #1: Contract Length
Contract Length.

(Required: Maximum 4000 characters allowed)

70 Reference #1: Number of Participants (excluding dependents)
Number of Participants (excluding dependents)

(Optional: Numbers only)

71 Reference 2
Reference 2

72 Reference #2 - Contact Person's Name and Title

(Required: Maximum 1000 characters allowed)

73 Reference #2 - Contact Person's School District/Business

(Required: Maximum 1000 characters allowed)

74 Reference #2 Address: Street, City, State, Zip Code

(Required: Maximum 1000 characters allowed)

75 Reference #2 Phone Number
 (____) ____ - ____ ext:
(Required)

**7
6** **Reference #2 Email**

(Required: Email address)

**7
7** **Reference #2: Contract Length**
Contract length.

(Required: Maximum 4000 characters allowed)

**7
8** **Reference #2: Number of Participants (excluding dependents)**
Number of Participants (excluding dependents)

(Optional: Numbers only)

**7
9** **Reference #3**
Reference #3

**8
0** **Reference #3 Contact Person's Name and Title**

(Required: Maximum 1000 characters allowed)

**8
1** **Reference #3 - Contact Person's School District/Business**

(Required: Maximum 1000 characters allowed)

**8
2** **Reference #3 Address: Street, City, State, Zip Code**

(Required: Maximum 1000 characters allowed)

**8
3** **Reference #3 Phone Number**
 (____) ____ - ____ ext:
(Required)

**8
4** **Reference #3 Email**

(Required: Email address)

85 Reference #3: Contract Length
Contract Length.

(Required: Maximum 4000 characters allowed)

86 Reference #3: Number of Participants (excluding dependents)
Number of Participants (excluding dependents)

(Optional: Numbers only)

87 Reference 4
Reference 4

88 Reference #4 Contact Person's Name and Title

(Required: Maximum 1000 characters allowed)

89 Reference #4 - Contact Person's School District/Business

(Required: Maximum 1000 characters allowed)

90 Reference #4 Address
Enter Street address, city, state, zip code

(Required: Maximum 1000 characters allowed)

91 Reference #4 Phone Number
 (____) _____ - _____ ext:
(Required)

92 Reference #4 Email

(Required: Email address)

93 Reference #4: Contract Length
Contract Length.

(Required: Maximum 4000 characters allowed)

94 Reference #4: Number of Participants (excluding dependents)
Number of Participants (excluding dependents)

(Optional: Numbers only)

95 Reference 5
Reference 5

96 Reference #5 - Contact Person's Name and Title

(Required: Maximum 1000 characters allowed)

97 Reference #5 - Contact Person's School District/Business

(Required: Maximum 1000 characters allowed)

98 Reference #5 Address: Street, City, State, Zip Code

(Required: Maximum 1000 characters allowed)

99 Reference #5 Phone Number
 (____) _____ - _____ ext:
(Required)

100 Reference #5 Email

(Required: Email address)

1 0 1	Reference #5: Contract Length Contract Length. <hr/> <hr/> <hr/> <hr/> <hr/> <p><i>(Required: Maximum 4000 characters allowed)</i></p>
-------------	---

1 0 2	Reference #5: Number of Participants (excluding dependents) Number of Participants (excluding dependents) <input style="width: 100px; height: 20px;" type="text"/> <p><i>(Optional: Numbers only)</i></p>
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1 0 3	Additional References Additional References <p>Additional reference information can be submitted as document. The document can be uploaded to the "Response Attachments" tab within the bid event.</p> <p>Be sure to include the following information:</p> <ul style="list-style-type: none"> Reference Contact Name Reference contact's school district/business Reference address (street, city, state, zip) Reference phone number Reference email address Description of services performed and completion date
-------------	--

Bid Lines

1	Initial Set-Up Fee <div style="text-align: right; margin-top: 10px;"> Price: \$ <input style="width: 100px;" type="text"/> Total: \$ <input style="width: 100px;" type="text"/> </div> <p>Supplier Notes: _____ _____</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <input type="checkbox"/> No bid <input type="checkbox"/> Additional notes <i>(Attach separate sheet)</i> </div>
---	--

2	Annual Renewal Fee <div style="text-align: right; margin-top: 10px;"> Price: \$ <input style="width: 100px;" type="text"/> Total: \$ <input style="width: 100px;" type="text"/> </div> <p>Supplier Notes: _____ _____</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <input type="checkbox"/> No bid <input type="checkbox"/> Additional notes <i>(Attach separate sheet)</i> </div>
---	--

3 Monthly Admin Fee

Price: \$ Total: \$

Supplier Notes: _____

No bid
 Additional notes
(Attach separate sheet)

4 Debit Card Fee

Price: \$ Total: \$

Supplier Notes: _____

No bid
 Additional notes
(Attach separate sheet)

5 Employer Cost

Price: \$ Total: \$

Supplier Notes: _____

No bid
 Additional notes
(Attach separate sheet)

6 Employee Cost

Price: \$ Total: \$

Supplier Notes: _____

No bid
 Additional notes
(Attach separate sheet)

7 Additional charges (if applicable).

Price: \$ Total: \$

Item Notes: Additional charges (if applicable) for other services (e.g., Premium Pre-Tax, SPD/plan doc preparation/printing, communications support, Form 5500 Filing, customized materials/reporting, etc.). Please list all applicable fees. Fees not listed will not be the responsibility of the District.

Supplier Notes: _____

No bid
 Additional notes
(Attach separate sheet)

8 Number of Years above fees are guaranteed.
(Line excluded from response total)

Quantity: 1 UOM: EA Price: \$ Total: \$

Item Notes: Number of Years above fees are guaranteed.

Supplier Notes: _____

No bid
 Additional notes
(Attach separate sheet)

Supplier Information

Company Name: _____

Contact Name: _____

Address: _____

Phone: _____

Fax: _____

Email: _____

Supplier Notes

By submitting your response, you certify that you are authorized to represent and bind your company.

Print Name

Signature