



Amendment 3

Solicitation Number: **USC-RFP-3651-CH**
 Date Issued: **August 20, 2020**
 Procurement Officer: **Caleisha Hayes**
 Phone: **803-777-4115**
 E-Mail Address: caleisha@mailbox.sc.edu
 Mailing Address: **1600 Hampton Street; Ste 606
 Columbia, SC 29208**

DESCRIPTION: Provide Employee Voluntary Benefits Program

USING GOVERNMENTAL UNIT: UNIVERSITY OF SOUTH CAROLINA

The Term "Offer" Means Your "Bid" or "Proposal". Your offer must be submitted in a sealed package. Solicitation Number & Opening Date must appear on package exterior. See "Submitting Your Paper Offer or Modification" provision.

SUBMIT YOUR SEALED OFFER TO EITHER OF THE FOLLOWING ADDRESSES:

MAILING ADDRESS:
 University of South Carolina – Purchasing Dept
 1600 Hampton Street, Suite 606, Attention: Bid Clerks
 Columbia SC 29208

PHYSICAL ADDRESS:
 University of South Carolina – Purchasing Dept
 1600 Hampton Street, Suite 606, Attention: Bid Clerks
 Columbia SC 29208

Solicitation openings and closings will be limited to teleconference only: Telephone 800-753-1965/Access code 777 7162

SUBMIT OFFER BY (Opening Date/Time): Tuesday, September 1, 2020 at 11:00 AM (local) (See "Deadline For Submission Of Offer" provision)

QUESTIONS MUST BE RECEIVED BY: August 6, 2020 at 11:00 AM (local) (See "Questions From Offerors" provision)

NUMBER OF COPIES TO BE SUBMITTED: 1 (One) Original Hard Copy;
 1 (One) USB Drive with Digital version of Technical Proposal;
 1 (One) USB Drive with Digital version of Price Proposal; and
 1 (One) USB Drive with Digital version of redacted Technical & Price proposal

CONFERENCE TYPE: Not Applicable
DATE & TIME:

(As appropriate, see "Conferences - Pre-Bid/Proposal" & "Site Visit" provisions)

LOCATION: Not Applicable

**AWARD &
 AMENDMENTS**

Award will be posted on **9/14/2020**. The award, this solicitation, any amendments, and any related notices will be posted at the following web address: <http://purchasing.sc.edu>

You must submit a signed copy of this form with Your Offer. By signing, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of forty-five (45) calendar days after the Opening Date. (See "Signing Your Offer" provision.)

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

Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror. 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.

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

DATE SIGNED

TITLE
 (business title of person signing above)

STATE or UNIVERSITY VENDOR NO.
 (Register to Obtain S.C. Vendor No. at www.procurement.sc.gov)

PRINTED NAME
 (printed name of person signing above)

STATE OF INCORPORATION
 (If you are a corporation, identify the state of incorporation.)

OFFEROR'S TYPE OF ENTITY: (Check one) (See "Signing Your Offer" provision.)

- Sole Proprietorship
 Partnership
 Other _____
 Corporate entity (not tax-exempt)
 Corporation (tax-exempt)
 Government entity (federal, state, or local)

PAGE TWO
(Return Page Two with Your Offer)

HOME OFFICE ADDRESS (Address for Offeror's home office / principal place of business)	NOTICE ADDRESS (Address to which all procurement and contract related notices should be sent.) (See "Notice" clause)
	Area Code - Number - Extension Facsimile
	E-mail Address

PAYMENT ADDRESS (Address to which payments will be sent.) (See "Payment" clause)	ORDER ADDRESS (Address to which purchase orders will be sent) (See "Purchase Orders and "Contract Documents" clauses)
____ Payment Address same as Home Office Address	____ Order Address same as Home Office Address
____ Payment Address same as Notice Address (check only one)	____ Order Address same as Notice Address (check only one)

ACKNOWLEDGMENT OF AMENDMENTS

Offerors acknowledges receipt of amendments by indicating amendment number and its date of issue. (See "Amendments to Solicitation" Provision)

Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date
1	08/13/2020	3	08/20/2020				
2	08/14/2020						

DISCOUNT FOR PROMPT PAYMENT (See "Discount for Prompt Payment" clause)	10 Calendar Days (%)	20 Calendar Days (%)	30 Calendar Days (%)	____ Calendar Days (%)
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PREFERENCES - A NOTICE TO VENDORS (SEP. 2009): On June 16, 2009, the South Carolina General Assembly rewrote the law governing preferences available to in-state vendors, vendors using in-state subcontractors, and vendors selling in-state or US end products. This law appears in Section 11-35-1524 of the South Carolina Code of Laws. A summary of the new preferences is available at www.procurement.sc.gov/preferences. **ALL THE PREFERENCES MUST BE CLAIMED AND ARE APPLIED BY LINE ITEM, REGARDLESS OF WHETHER AWARD IS MADE BY ITEM OR LOT. VENDORS ARE CAUTIONED TO CAREFULLY REVIEW THE STATUTE BEFORE CLAIMING ANY PREFERENCES. THE REQUIREMENTS TO QUALIFY HAVE CHANGED. IF YOU REQUEST A PREFERENCE, YOU ARE CERTIFYING THAT YOUR OFFER QUALIFIES FOR THE PREFERENCE YOU'VE CLAIMED. IMPROPERLY REQUESTING A PREFERENCE CAN HAVE SERIOUS CONSEQUENCES.** [11-35-1524(E)(4)&(6)]

PREFERENCES - ADDRESS AND PHONE OF IN-STATE OFFICE: Please provide the address and phone number for your in-state office in the space provided below. An in-state office is necessary to claim either the Resident Vendor Preference (11-35-1524(C)(1)(i)&(ii)) or the Resident Contractor Preference (11-35-1524(C)(1)(iii)). Accordingly, you must provide this information to qualify for the preference. An in-state office is not required, but can be beneficial, if you are claiming the Resident Subcontractor Preference (11-35-1524(D)).

____ In-State Office Address same as Home Office Address
 ____ In-State Office Address same as Notice Address **(check only one)**

PURPOSE OF AMENDMENT

The Purpose of the amendment is to provide answers to bidder questions following the closing of the question and answer period.

AMENDMENTS TO SOLICITATION (JAN 2004)

(a) The Solicitation may be amended at any time prior to opening. All actual and prospective Offerors should monitor the following web site for the issuance of Amendments: www.procurement.sc.gov(b) Offerors shall acknowledge receipt of any amendment to this solicitation (1) by signing and returning the amendment, (2) by identifying the amendment number and date in the space provided for this purpose on Page Two, (3) by letter, or (4) by submitting a bid that indicates in some way that the bidder received the amendment. (c) If this solicitation is amended, then all terms and conditions which are not modified remain unchanged. [02-2A005-1]

QUESTIONS FROM OFFERORS - AMENDMENT (JUN 2017)

The solicitation is amended as provided herein. Information or changes resulting from questions will be shown in a question-and-answer format. All questions received have been reprinted on the following pages. The “University’s response” should be read without reference to the questions. The questions are included solely to provide a cross-reference to the potential offeror that submitted the question. Questions do not form a part of the contract; the “state’s response” does. Any restatement of part or all an existing provision of the solicitation in an answer does not modify the original provision except as follows: underlined text is added to the original provision. Stricken text is deleted. [02-2A097-1]

Answers to Bidder Questions

1 Is the University specifically looking for a Worksite Short Term Disability (STD) program offering for employees or are you also interested in a Group STD program?

As we understand the trend is Worksite STD, we would like to have both options made available to decide which program would better serve our employees.

2 For those employees needing Long Term Disability (LTD), how will the STD program coordinate?

The current LTD options have either 90-day or 180-day waiting periods. Once the employee begins to receive LTD benefits, the STD will end even if the STD waiting period has not been met.

- 3 During the time of Covid-19 many businesses are shuttered in, with many people working remotely and employers focused on dealing with the virus. Given this fact, we wanted to confirm physical copies of our response are required and also ask whether we can utilize electronic signatures for the required forms.**

While electronic signatures are permissible, Offerors shall submit proposals as stated on the Header Page of the solicitation and amendments:

- 1 (One) Original Hard Copy;
- 1 (One) USB Drive with Digital version of Technical Proposal;
- 1 (One) USB Drive with Digital version of Price Proposal; and
- 1 (One) USB Drive with Digital version of redacted Technical & Price proposal

- 4 In instances where we have multiple state vendor numbers per the www.procurement.sc.gov website, please advise on which number should be utilized for the required forms.**

Please use the one, which is most current. As an alternative, if you have a UofSC Supplier number, please provide it instead (notating that it is a UofSC number).

- 5 Would you like us to work off of previous quotes in regard to plan design? If not, please provide details about any desired plan design features.**

Offerors shall be evaluated strictly on the Evaluation Factors stated on Page 22 (Section 6) of the original solicitation. Please limit your proposals to the information requested on Pages 16-18 (Section 4) of the original solicitation (Information for Offerors to Submit).

Also, Offerors may consider the following:

We expect the vendor to present a plan based on current industry standards with the options to modify the program. However, the plan design should include the length of time range from 90 to 180 days which should coordinate with the current LTD program waiting periods. There should be a “return to work” provision that employees cannot continue to receive benefits if they refuse a temporary or transitional assignment. The wage replacement should be less than 70 percent of salary to two-thirds to be concurrent with workers’ compensation.

Nothing else will be considered for evaluation or following award of a contract.

- 6 What commissions, if any, are being requested?**

This is the first time that we are offering these services. The University will not be requesting commissions, nor will we be paying any fees. The resulting agreements shall be between the Contractor and individual employees.

- 7 Census – Please provide a benefit eligible census with the following information.**

This information is provided online:

<http://purchasing.sc.edu/solicitations/USC-RFP-3651-CH-Addendum.pdf>

8 Do employees have a sick bank and/or do they accrue PTO? If so, what is the accrual basis?

Employees accrue annual and sick leave. See the charts below.

- **Sick Leave** - Full-time employees in FTE positions will earn sick leave at the rate of one and one-fourth working days per month of service. b. Part-time employees in FTE positions will earn sick leave on a pro-rata basis.
- **Annual Leave** - Rate of Earnings (Based on five-day workweek schedule of 37.5 or 40 hours per week).

<u>Years of Service</u>	<u>Days Per Year</u>	<u>Hours Per Month</u>
1 - 10	15.00	9.38
11	16.25	10.16
12	17.50	10.94
13	18.75	11.72
14	20.00	12.50
15	21.25	13.28
16	22.50	14.06
17	23.75	14.84
18	25.00	15.62
19	26.25	16.41
20	27.50	17.19
21	28.75	17.97
22 and over	30.00	18.75

<u>Years of Service</u>	<u>Days Per Year</u>	<u>Hours Per Month</u>
1 – 10	15.00	10.00
11	16.25	10.83
12	17.50	11.67
13	18.75	12.50
14	20.00	13.33
15	21.25	14.17
16	22.50	15.00
17	23.75	15.83
18	25.00	16.67
19	26.25	17.50
20	27.50	18.33
21	28.75	19.17
22 and over	30.00	20.00

9 What is the average “bank” of time an employee has? If the group currently does have a sick bank or other sick pay type leave program in place, how does the group expect the sick bank to be integrated with the STD plan?

- Will employees be required to use the entire sick bank before STD begins?
- Will the sick bank payment offset the STD benefit?
- Is the STD benefit paid on top of the sick bank payment? If yes, is the total paid between STD and the sick bank capped at 100%?

Please find the answers in bold and underlined as follows:

What is the average “bank” of time an employee has? **510.68** If the group currently does have a sick bank or other sick pay type leave program in place, how does the group expect the sick bank to be integrated with the STD plan? **The employee is expected to use sick leave.**

- Will employees be required to use the entire sick bank before STD begins? **No.**
- Will the sick bank payment offset the STD benefit? **No**
- Is the STD benefit paid on top of the sick bank payment? If yes, is the total paid between STD and the sick bank capped at 100%? **The University will entertain options based upon industry standards.**

10 In terms of plan offering Whole Life Insurance, Long-Term Care, Short-Term Disability, Employee Discount Programs, Critical Illness, and Legal Assistance were the top choices based on the referenced employee survey. Is the intention to introduce all plans listed for Open Enrollment? Or is USC looking to vendors for guidance on the plan offerings and multiyear strategy?

We are looking to offerors for guidance on the plan offering and multiyear strategy.

11 In the Scope of Services “one common billing to the university that includes all voluntary benefits” is listed. Please confirm USC is referring to consolidated billing/premium accounting.

We would like a single bill itemized by employee and deduction type.

- End of Amendment 3 -