



## AMENDMENT TO SOLICITATION

### Amendment No. 4

**DATE:** October 15, 2018  
**TO:** ALL VENDORS  
**FROM:** Leann DeLoach, Procurement Specialist  
**SOLICITATION:** USC-RFP-3361-LD  
**DESCRIPTION:** Provide Promotion and Support for Employee Voluntary Benefits

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Amendment No. 4 modifies this Request for Proposals only in the manner and to the extent as stated herein.

### Question & Answers

1. Will the selected vendor be allowed to conduct group meetings and meet with each employee face-to-face?  
**Yes, because it is voluntary meetings will not be mandatory**
2. Is there a third party/consultant who will be assisting the University with vetting the proposals and selecting the products?  
**No**
3. Please provide a census file that includes the run date as well as the following key information: Gender, Zip Code, Date of Birth, and Salary. We realize that Amendment 1 was issued indicating a census wasn't need. While rates can be provide for Critical Illness, a census will help us to provide rates that are appropriate for the demographics of the group. Without a census, our book of business assumptions on gender, age, and salary for your industry will be used. A census can help us provide a better plan design and rates for the entire group. However, a census must be provided to quote the WSTD=due to the limitations around the salary cap % applied at the employee level.  
**Because we are in the implementation stage of a new software we are not able to issue a report.**
4. There are alternatives to the Whole Life offering. Traditionally, Whole Life is used for blue collar employees, which differs from the University's current employee base. Would you be acceptable to offering GVUL or GUL as an alternative to Whole Life?  
**Yes, keep in mind these products are voluntary without the university's contribution.**
5. Please provide details on any plan design requirements for the requested Legal plan. In addition, is the University looking for the carrier to include ID theft services?  
**No specific requirement and if they offer ID theft you can provide pricing.**
6. In Section IV. Information For Offerors To Submit – Proposal Contents – Business Proposal, page 13 of the RFP, it was mentioned that the contractor, carrier, would be paid \$0.00 for their services, but that our Business Proposal should also a breakdown of

your firm's commission rates and/or fees and charges for services, which shall include all travel and expenses, if applicable. Please confirm if this RFP is net of commissions.

Please refer to the revised/modified "Cost" Item Below (Items Corrected #1)

7. Our interpretation of the University's RFP is that any clarification or requested change to the University's terms and conditions would be included as a part of our final proposal. Please confirm this is the appropriate time to include any changes or clarifications to the University's terms and conditions.

Please refer to the revised/modified version of the "Legal Agreements Included with Proposals must be clearly labelled "SAMPLE" clause below (Items Corrected #2)

8. Please clarify if the University will be utilizing payroll deduction for these benefits

Yes

9. Can carriers bring in a TPE to enroll, bill and provide the services requested?

Yes

10. Will employees have to make an election/decision?

No

11. Can text, Web or call centers be used to educate/enroll employees?

Web and Call Center

12. Will there be ongoing platform support?

Yes

13. Please provide details on how the University will administer the requested benefits.

We hope to have provider to offer a platform that can integrate with Peoplesoft

14. What channels does the University typically use to communicate benefits information with employees (email, portal, print, etc.)? Are there any communications or benefit education challenges you would like to address?

Email and fliers and mailing, in person meetings- Challenge is always communicating to such a large number of people.

15. How does the University intend to handle enrollment – online? telephonic? paper? Will employees have the opportunity to enroll in these benefits at the same time and on the same platform as Medical? Will enrollment be a mandatory and active process – will employees be required to actively elect or decline benefits in order to have benefits the following year?

Online. No it will be a separate platform and for year one it will be separate from the annual Open Enrollment-Special Enrollment. Enrollment is passive.

16. How many onsite events does the University typically hold throughout the year and during annual enrollment? How many employees are expected to attend from the eight campuses?

Currently no events but will have special events for voluntary products. Each location will vary.

17. Would the University be agreeable to us coordinating a standalone, focused enrollment and communication campaign for these voluntary benefits?

Yes

18. Would the University be agreeable to the carrier providing ongoing communication to employees experiencing life events (newly hired, newly eligible, retirement, newly married, new parent, etc.

Yes

19. Within the RFP; Section IV. Information For Offerors to Submit, General (MAR 2015), page 12, it states that the vendor should submit a summary of all insurance policies we have or plan to acquire to comply with the insurance requirements stated herein. In order for us to provide evidence of insurance, we would need to better understand the University's actual insurance requirements. Please provide a description of the specific insurance requirements the University is requesting as this was not included in the RFP.

Please refer to the revised/modified version of the Information For Offerors To Submit – General clause in Section IV. Information For Offerors to Submit listed below (Items Corrected #3).

#### ITEMS CORRECTED:

1. Business Proposal Item of Proposal Contents clause in Section IV. Information for Offerors to Submit of the Solicitation has been revised/modified and now reads as follows:  
Business Proposals – Offeror is to provide a thorough and detailed presentation of all costs to be incurred by the University for it to perform all Brokerage Services essential to employees purchasing Voluntary Employee Benefits insurance during the term of the contract. Please note that the University prefers to pay \$0.00 to the contractor for performing all brokerage services essential to employees purchasing Voluntary Employee Benefits insurance during the term of the contract.
2. The “Legal Agreements Included with Proposals Must Be Approved” clause heading in Section II-B (Instructions to Offerors-Special Instruction) was incorrect. The correct title of the clause now reads: LEGAL AGREEMENTS INCLUDED WITH PROPOSALS MUST BE CLEARLY LABELLED ‘SAMPLE’ The clause has now been revised/modified and reads as follows: LEGAL AGREEMENTS INCLUDED WITH PROPOSALS MUST BE CLEARLY LABELLED SAMPLE  
Every page of legal agreement(s) that Offeror expects the University to sign in order to do business with Offeror, Offeror's terms and conditions, and/or similar type legal documents pursuant to potential contract award that Offeror chooses to include with its proposal must be clearly labelled “SAMPLE”. If Offeror's proposal is the highest ranked offer from the evaluation process for the solicitation, then the University will consider the legal documents pursuant to potential contract award that the Offeror included with its proposal and clearly labelled “SAMPLE”.
3. The Information For Offerors To Submit – General clause in Section IV. Information For Offerors to Submit of the solicitation has been revised/modified and now reads as follows:  
**INFORMATION FOR OFFERORS TO SUBMIT – GENERAL:** You shall submit a signed Cover Page and Page Two. Your offer should include 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 Part IX. Attachments to Solicitations.

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Bidder shall acknowledge receipt of Amendment No. 4 in the space provided below and return it with their bid response. Failure to do so may delay award of contract.

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Authorized Signature

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Name of Offeror

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Date