

Lunenburg County Board of Education

School Board Office
(434) 676-2467



Fax
(434) 676-1000

Office of the Superintendent
Post Office Box 710
Kenbridge, Virginia 23944

TO: Prospective Vendors
DATE: December 20, 2016
SUBJECT: Request for Proposals for Insurance Consulting Services

You are invited to submit a negotiable proposal to provide Consulting Services for Life and Health Insurance for the Lunenburg County Public Schools. THIS IS NOT A REQUEST FOR INSURANCE COVERAGE. Within this RFP Lunenburg County Public Schools will also be referred to as LCPS.

To obtain a copy of this RFP please download it from our website: www.lunenburgcountyschools.org

The written requirements contained in this Request for Proposal shall not be changed or superseded except by written addendum from Lunenburg County Public Schools. Failure to comply with the written requirements for this RFP may result in disqualification of the submittal by Lunenburg County Public Schools

Submittals are to be sealed, marked with the submitting firm's name and address and labeled: **"Life and Health Insurance Consulting Services"** and delivered to:

LUNENBURG COUNTY PUBLIC SCHOOLS
Attention: James Abernathy
1009 Main Street
Post Office Box 710
Kenbridge, Virginia 23944

not later than Tuesday, January 31, 2017 at 11:00 A.M. **local time.**

Lunenburg County Public Schools reserves the right to reject any and all submittals, to waive any technicalities or irregularities and to award contracts based on the best interest of Lunenburg County Public Schools.

SECTION I – REQUEST FOR PROPOSALS OVERVIEW

A. PURPOSE

The purpose of this Request for Proposals (RFP) is to seek a qualified Consultant to assist the Lunenburg County Public Schools with strategically planning, designing, negotiating and implementing the best coverage and cost for Employee Life and Health Insurance Programs. THIS IS NOT A REQUEST FOR INSURANCE COVERAGE.

B. INFORMATION TO OFFERORS

1. RFP TIMETABLE

The anticipated schedule for the RFP is as follows:

RFP Available	December 20, 2016
Submittal deadline	Tuesday, January 31, 2017 11:00 A.M., local time

2. BID SUBMISSION:

One (1) original and three (3) copies of the complete signed submittal must be received Tuesday, January 31, 2017 by 11:00 A.M. **local time prevailing**. Proposals must be submitted in a sealed envelope stating on the outside, the submitting firm name, address and title “**Life and Health Insurance Consulting Services**” to:

LUNENBURG COUNTY PUBLIC SCHOOLS
Attention: James Abernathy
1009 Main Street
Post Office Box 710
Kenbridge, Virginia 23944

Hand delivered copies may be delivered to the above address **ONLY** between the hours of 8:30 a.m. and 4:00 p.m. ET, Monday through Friday, excluding holidays observed by the Lunenburg County Public Schools.

Submitting firms are responsible for informing any commercial delivery service, if used, of all delivery requirements and for ensuring that the required address information appears on the outer wrapper or envelope used by such services.

The Submittal must be signed by a company officer who is legally authorized to enter into a contractual relationship in the name of the submitting firm.

3. ADDITIONAL INFORMATION/ADDENDA

Lunenburg County Public Schools will issue any corrections or amendments it deems necessary in written addenda posted on the website prior to the due date. Submitting firms should not rely on any representations, statements or explanations other than those made in this RFP or in any addendum to this RFP. Where there appears to be a conflict between the RFP and any addenda issued, the last addendum issued will prevail.

4. LATE SUBMITTAL, LATE MODIFICATIONS AND LATE WITHDRAWALS

Submittals received after the due date and time will not be considered. Modifications received after the due date will not be considered. Lunenburg County Public Schools assumes no responsibility for the premature opening of a proposal not properly addressed and identified, and/or delivered to the proper destination.

5. REJECTION OF PROPOSALS

Lunenburg County Public Schools may reject any and all proposals and reserves the right to waive any irregularities or informalities in any proposal or in the submittal procedure.

Submittals received after said time or at any place other than the time and place as stated in the notice will not be considered.

6. MIMINUM RFP ACCEPTANCE PERIOD

Proposals shall be valid and may not be withdrawn for a period of 90 days from the date specified for receipt of proposals.

7. NONCOLLUSION AFFIDAVIT

By submitting a Proposal, the offeror represents and warrants that such proposal is genuine and not a sham or collusive or made in the interest or in behalf of any person not therein named and that the offeror has not directly or indirectly induced or solicited any other offeror to put in a sham proposal, or any other person, firm or corporation to refrain from submitting and that the offeror has not in any manner sought by collusion to secure to that offeror any advantage over any other offeror.

By submitting a proposal, the offeror represents and warrants that no official or employee of Lunenburg County Public Schools has, in any manner, an interest, directly or indirectly in the proposal or in the contract which may be made under it, or in any expected profits to arise there from.

8. COST INCURRED BY OFFERORS

All expenses involved with the preparation and submission of the RFP to the Lunenburg County Public Schools, or any work performed in connection therewith is the responsibility of the offeror(s).

9. RFP OPENING

Submitted proposals will not be opened or read aloud publicly.

C. GENERAL PROCUREMENT INSTRUCTIONS

1. Lunenburg County Public Schools must receive all proposals not later than the date and time listed on the cover sheet of this proposal. Proposals must be sealed with “**Life and Health Insurance Consulting Services**” clearly marked on the outside of the envelope. **Four (4) copies of the proposal must be received from each offeror (1 original, 3 copies).** Each proposal must be signed and dated by an official authorized to bind the firm. Late proposals will not be considered for award. Electronic proposals (fax, email, etc.) will not be considered.
2. Proposals will be evaluated according to completeness, content, experience with similar projects, ability of the Consultant and its staff. The award of a contract to one consultant does not mean that the other proposals lacked merit, but that, all factors considered, the selected proposal was deemed to provide the best value to the LCPS.
3. Consultants are cautioned that this is a request for offers, not a request to contract and the LCPS reserves the unqualified right to reject any and all offers when such rejection is deemed to be in the best interest of the LCPS.
4. Elaborate proposals in the form of brochures or other presentations beyond that necessary to present a complete and effective proposal are not desired.

5. Any costs incurred by consultant in preparing or submitting offers are the consultant's sole responsibility.
6. Proposals must be submitted in accordance with the requirements of the RFP. Failure to include any required information may cause rejection of the proposal.
7. All respondents must provide references in their proposal. Failure to provide references will automatically disqualify a respondent.

SECTION II – GENERAL CONDITIONS

A. Purpose:

The purpose of this Request for Proposals (RFP) is to seek a qualified consultant to assist Lunenburg County Public School with strategically planning, designing and negotiating the best coverage and cost for employee Life and Health insurance programs. LCPS insures approximately 350 full-time employees. Lunenburg County Public Schools is constantly competing to recruit and retain the best employees possible. Our leadership is looking to ensure we have a financially competitive and affordable Life and Health Insurance Program to offer our employees.

B. Contract Period:

Any contract resulting from this proposal shall be effective beginning, July 1, 2017. Lunenburg County Public Schools reserves the right to renew the contract to continue services for four additional one-year terms should it remain in the best interest of the LCPS and its employees to retain said services.

C. Respondent Qualifications:

The firm must have not less than **5** years experience in providing consulting services to employees with at least **250** employees. Experience in consulting services to public sector employers is preferred but not required.

D. Scope of Work:

1. Please describe your firm's process for clients that are similar to the Lunenburg County Public Schools. Please include a detail description of the services and work provided throughout the year.

E. Vendor Proposal Requirements:

The proposal response must clearly demonstrate the required qualifications, expertise, competence and capability of the vendor. Please provide a concise description of the services your firm will provide. Costs incurred by firms responding to this RFP are solely their responsibility. Additionally, please include the answer to the following questions (Address each by number):

1. Briefly describe your company's organization, philosophy, and management. Also, please provide a brief company history.
2. Describe your contractual relationships, if any, with organizations or entities necessary to your proposal's implementation (i.e. actuarial services, data information services, etc.)
3. How long has your organization been providing consulting services?

4. What is your firm's method of communication and customer service interaction with clients?
5. What makes your organization unique from other organizations that may submit proposals for the Lunenburg County Public Schools' consideration?

F. Criteria for Evaluation:

All proposals will be evaluated according to, but not necessarily limited to, the following:

- Your firm's ability to provide a level of service sufficient to meet the LCPS needs
- Extent and success of previous work your firm has provided to organizations similar in nature and size to Lunenburg County Public Schools, as determined by Lunenburg County Public Schools' contact with listed references.
- Qualifications/experiences of key personnel to be assigned to the project.
- Adherence to RFP requirements.

G. Pricing

Please clearly outline your firm's charges to provide the annual services described in your proposal. This information is to be delivered in a separate, sealed envelope marked: **PRICING, (Life and Health Insurance Consulting Services)** and delivered to:

LUNENBURG COUNTY PUBLIC SCHOOLS
Attention: James Abernathy
1009 Main Street
Post Office Box 710
Kenbridge, Virginia 23944

With your proposal by Tuesday, January 31, 2017, by 11:00 A.M.

H. Oral Presentations:

During the evaluation process, Lunenburg County Public Schools may at its discretion, request oral presentations from any or all respondents for the purpose of clarification or amplifying the materials presented. However, respondents are cautioned that the LCPS is not required to request clarification; therefore, all proposals should be complete.

I. Final Selection:

Following review of all qualified proposals, negotiation and selection of a suitable vendor shall be made and a recommendation will be made to the Lunenburg County Public School Board. Following approval, the LCPS will complete contract negotiations. The selection consultant should be prepared to commence working immediately following the approval of the Board, assuming the responsibilities of preparing and installing the upcoming July 1 renewal. The annual consulting contract will run from July 1 through June 30.

Note: Lunenburg County Public Schools reserves the right to accept the response that is determined to be in the best interest of the LCPS and its employees. Lunenburg County Public Schools reserve the right to reject any and/or all proposals.

NONDISCRIMINATION OF CONTRACTORS

A bidder, proposer or contractor shall not be discriminated against in the solicitations or award of this contract because of race, religion, color, gender, national origin, age or disability or against faith-based organizations. If the award of this contract is made to a faith-based organization and an individual who applies for or receives goods, services or disbursements provided pursuant to this contract objects to the religious character of the faith-based organization from which the individual receives or would receive the goods, services or disbursement, The Lunenburg County Public Schools shall offer the individual, within a reasonable period of time after the date his objection, access to equivalent goods, service or disbursements from an alternative provider.

DRUG FREE WORKPLACE

During the performance of this contract, the vendor agrees to (1) provide a drug-free workplace for the contractor's employees; (2) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (3) state in all specifications or advertisements for employees placed by or on behalf of the contractor that the contractor maintains a drug-free workplace; and (4) include the provisions of the foregoing clauses in every subcontract or purchase order of \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

For the purposes of this section, "Drug-Free Workplace" means a site of the performance or work done in connection with a specific contract awarded to a contractor in accordance with this chapter, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract.