



PIMA COUNTY PROCUREMENT DEPARTMENT
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Mary Jo Furphy
Procurement Director

October 5, 2016

ADDENDUM NO. 1

SOLICITATION NO. 228829 Supplemental Benefits

Be advised of the following clarifications to the above-referenced Solicitation as stated in the following Addendum.

SOLICITATION DUE DATE:

DUE IN AND OPEN REMAINS: OCTOBER 20, 2016 AT OR BEFORE 2:00 P.M. LOCAL ARIZONA TIME (MST)

CHANGES:

Replace the original *INSTRUCTIONS TO OFFERORS*, 6. SUBMISSION OF OFFERS, C. Exhibit 2: Criteria Questionnaire found on Page 4 of 5 with Exhibit 2: Criteria Questionnaire below. Original omitted "e. Key Personnel".

- C. Exhibit 2: Criteria Questionnaire**, fully completed as requested, including all requested documentation divided in the following sections:
- a. Cost (Exhibit 2-1: Supplemental Benefit Pricing Workbook) Option A and Option B
 - b. Rate Guarantees
 - c. Company Experience
 - d. Plan Benefits to include Exhibit 2-2: Supplemental Plan Design Workbook with plan brochures and policies.
 - e. Key Personnel
 - f. References (Exhibit 2-3: Reference Form) - This form is to be provided by offeror to their current clients, and the clients shall complete the form and return it to you. References must be submitted with proposal. Offeror must provide forms from at least 3 current clients. Failure to meet this requirement may cause submittal to be deemed non-responsive
 - g. Sustainability

CLARIFICATIONS:

The following clarifications are a result of questions that arose during the Pre-Proposal Conference held on October 4, 2016:

~ Annual Enrollment occurs each spring with approximately twelve fairs and typically a three-week duration. To encourage participation, just prior to Annual Enrollment, Human Resources as well as other departments within the County may host employee sessions whereby the vendor may present all supplemental benefits products and complete the enrollment process. Electronic or phone enrollments are permissible, but the vendor must provide Human Resources payroll deduction authorization forms from each employee to support information submitted on the bi-weekly enrollment/change/termination file. Human Resources will communicate vendor contact information to employees so that interested employees who do not attend a presentation or fair may contact vendor to enroll.

~ Current deductions for the supplemental benefit products will end in June of 2017. Employees have the option of maintaining coverage independently through Aflac. In addition, there are approximately 200 employees that have been grandfathered to remain with Professional Insurance Company. Those deductions will remain in place.

Supplemental benefits are deducted pre-tax with the exception of Short Term Disability and Critical Care which are deducted on a post-tax basis.

~ Pima County will assume no costs associated with file formatting or data transmission. Vendor must format enrollment and change file to these ADP specifications.

File Type: CSV (Comma Delimited)

DETAIL RECORD - ALFAC NON-MANAGED BENEFIT FILE				
Field #	Column	Description	Data Type	Comments
1	A	EmployeeID	Alpha	0000123456
2	B	First	Alpha	
3	C	Last	Alpha	
4	D	Benefit Plan	Alpha	Valid Plans NONMACCIDENT NONMCANCER NONMHOSPITAL NONMLTC NONMVISION NONMSTD-POST NONMSTD-PRE NONMAFCRIT
5	E	EffectiveStartDate	Alpha	Format: MM/DD/YYYY
6	F	EffectiveEndDate	Alpha	Format: MM/DD/YYYY pass as blank unless coverage is ending
7	G	EmployeePayPeriodCost	Alpha	Format: 00.00 If coverage is ending, send current value, do not zero out cost

Example

EmployeeID	First	Last	Benefit Plan	EffectiveStartDate	EffectiveEndDate	EmployeePayPeriodCost
Coverage Terming						
0000100001	JOHN	SMITH	NONMSTD-POST	07/01/2011	02/03/2016	18.00
0000120002	JANE	BROWN	NONMACCIDENT	07/01/2013	02/03/2016	14.10
0000127009	MARK	JONES	NONMSTD-POST	07/01/2013	02/03/2016	18.00
0000127009	MARK	JONES	NONMACCIDENT	07/01/2013	02/03/2016	21.00
New Coverage						
0000140162	MARY	DAVIS	NONMSTD-POST	02/01/2016		13.50
0000140162	MARY	DAVIS	NONMHOSPITAL	02/01/2016		19.02
0000129013	VALERIE	BERTINELLI	NONMSTD-POST	07/01/2012		17.16

~ CBIZ typically receives on average between 25,000 - \$27,000 per year based on the number of employees enrolled in Pima County's supplemental benefits plan. It is Pima County's expectation that CBIZ will continue to receive the same or similar compensation from the winning bidder. Commissions should be calculated and paid on a levelized basis. If commissions are not typically built into your quoted rates, then this should be clearly identified in your proposal and rates with and without commissions should be provided.

All other requirements and terms of the Solicitation remain unchanged. Failure to include acknowledgment of all addenda may be cause for rejection.

This Addendum is a total of 3 pages.

If any questions, please contact me via e-mail at denise.waldo@pima.gov.

/s/ Denise D Waldo

Denise D Waldo, CPPB, Commodity/Contracts Officer