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DATE: 08/25/2020

BID/ RFP NUMBER: 21-015 RA

BID/RFP TITLE: Actuarial & Benefits Consulting Services

ADDENDUM NUMBER: 1

The following are clarifications, changes, and/or questions and responses to Bid/RFP.

1. Question regarding Scope of Services # 20. What types of communications is APS seeking its consultant to prepare (posters, post cards, emails, benefit guides, etc)?

Response: Albuquerque Public Schools (APS) has an in-house Communications Department, Web Team and Graphics Department. Assistance needed will generally be limited to the consultant sharing best practices, ideas that have worked for other clients, and possible review of items developed by APS. Assistance will also be required to ascertain that all required notices are up-to-date, and that any new required notices are included in APS communications. If there is a need for more extensive development of communications materials by the consultant, those will be discussed in advance to determine whether they fall under the agreed upon Scope of Services.

If you would like to submit samples of employee communications pieces that you have done for other clients, you are welcome to do so.

2. Please provide clarification around Scope of Services #21. We are unsure what is expected around this item as listed in the Proposal Format.

Response: The intent of item #21 is to insure that the consultant is available to review any required notices for compliance with federal and/or state regulations.

3. Please provide clarification around Scope of Services #23. Is APS requesting the consultant to create, design, and/or administer various employee surveys? OR, is APS only requesting the consultant to "advise and assist" APS in their creation, design, and/or administration of applicable surveys?

Response: APS is requesting that the consultant be available to advise and assist the APS Benefits Department/internal team in our creation, design and/or administration of any applicable surveys. If there is a need for extensive development or administration of

employee surveys by the consultant, those will be discussed in advance to determine whether they fall under the agreed upon Scope of Services.

4. The Proposal Format indicates Item 21 should be included in the Exhibits. This item is specified as one that requires a “Confirm” response, so our assumption is that this was intended to reference Item 20 (sample communication strategies). Is this accurate, or is something else required for Item 21 in the Exhibits?

Response:

Thank you for pointing out this discrepancy in the Proposal Format. Please note the correction below:

1. Proposal Format

Proposals shall not exceed 60 pages total for all of the sections listed below. Each sheet face that is printed with text or graphics counts as one page. Letter of Transmittal and Required Forms do not count towards page count.

Letter of Transmittal

Scope of Services responses

General Questionnaire responses

Cost proposal

Exhibits

- Item 17

- **Item 20**

- ~~Item 21~~

- References

- Required Forms and Attachments

5. What circumstances prompted this RFP?

Response: APS is required to go out to bid every four years under State of New Mexico Procurement rules.

6. What are current and/or expected future challenges and priorities for APS related to its benefit programs?

Response: APS will not provide this information as part of the RFP; it will be discussed with our selected vendor.

7. Other than those details in the RFP, are there any known plans, major initiatives and/or strategies expected to be deployed in 2021 or beyond that might have an impact on the delivery of this requested scope of service?

Response: No

8. Which consulting/brokerage firm presently provides both actuarial and benefits consulting services to APS and where is their primary service delivery office located?

Response: The Segal Company is our current consulting firm, providing both actuarial and benefits consulting services. Their delivery office is in Phoenix, Arizona.

9. How long has the incumbent consulting/brokerage firm worked with APS?

Response: The start date of the contract with The Segal Company was October 6, 2016.

10. Please provide a copy of the proposed/template Master Services Agreement.

<https://www.aps.edu/procurement/procuring-professional-development/professional-services-agreement>

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11. The RFP scope of services includes data warehousing services. If APS is currently partnered with a data warehouse vendor, who is that vendor and are they separately contracted with APS?

Response: The Segal Company provides data warehousing services for APS. Their actuarial and benefits consulting services contract includes data warehousing services. (The data is owned by APS, and will be available to the selected consultant.)

12. Does APS purchase any services through group purchasing coalitions such as pharmacy?

Response: APS is part of the Interagency Benefits Advisory Committee (IBAC), an organization made up of four State of New Mexico agencies. The IBAC is required to go out to bid every four years under State of New Mexico Procurement rules. The medical, dental, vision, pharmacy benefit manager, life insurance and long-term disability insurance RFP's are all handled by IBAC. As noted in item #29 in the Scope of Services, IBAC RFP's for two or more of the IBAC agencies are not included in the Scope of Services for this RFP #21-015 RA.

13. Please confirm that there is no stop loss insurance coverage in place for the self-funded medical plans.

Response: APS currently has stop loss coverage. The intent of question #30 is that the consultant assist APS in the annual renewal/marketing of the stop loss coverage.

14. The RFP scope requests IBNR services for all self-insured plans. Outside of the medical, dental, and vision plans detailed in the RFP, are there other self-funded plans that will require IBNR calculations?

Response: The APS dental plan, vision plan and medical plan (which includes pharmacy benefits), are self-funded. There are no other self-funded plans that would require IBNR calculations.

15. How frequently does APS conduct market evaluations of its vendor/carrier partners? To the degree there is a standard procurement schedule, please provide details.

Response: As indicated above, APS is part of the Interagency Benefits Advisory Committee (IBAC). The IBAC is required to go out to bid for each line of coverage every four years under State of New Mexico Procurement rules. As noted in item #29 in the Scope of Services, IBAC RFP's for two or more of the IBAC agencies are not included in the Scope of Services for this RFP #21-015 RA.

16. Does APS hold a position for or against the use of commissions as a form of compensation to the consultant/broker for these services?

Response: The consultant will be paid as outlined in the RFP. No commissions will be paid on any line of service.

17. If not opposed, are commissions used today as a form of compensation for any aspect of this scope of work, and if so, approximately how much of the consulting firm's compensation is derived from commission revenue (%)?

Response: Not applicable

18. The boxes for necessary commentary (where applicable) are small. May the format of the scope of service portion of the document be changed to allow for appropriate commentary when required under DESCRIBE?

Response: The responding vendor should provide a detailed narrative. That narrative should not be placed in the box marked "Describe" but on a separate page. Please indicate the item number from the Scope of Services, and ideally also copy and paste the text from the Scope of Services item, and then provide your response. Responding vendor may re-format the Scope of Services if that is their preference.

19. When the question asks to CONFIRM, does APS expect/desire other commentary besides the word CONFIRMED?

Response: No, as indicated in the instructions on page 14, the responding vendor should indicate the ability to provide this service with the word CONFIRM (in all caps). If there is an item your firm cannot provide, then indicate "Unable to Provide" in the box.

ACKNOWLEDGE ADDENDUM WITH SUBMITTED PROPOSAL:

Addenda not signed and returned may consider the RFP non-responsive and may be rejected.

COMPANY/FIRM NAME

SIGNATURE

DATE