



**SPECIAL ADMINISTRATIVE BOARD OF THE TRANSITIONAL SCHOOL  
DISTRICT OF THE CITY OF ST. LOUIS**

**RFP TITLE: Enrollment & Eligibility Services, FSA/Section 125 Administration, COBRA  
Administration and Dependent Audit Services**

**RFP #: 028-1819**

**DATE OF ISSUANCE:** March 22, 2019

**QUESTIONS DUE:** March 29, 2019, 4:00 P.M.

**BIDDER'S CONFERENCE CALL:** April 05, 2019 at 10:00 A.M.  
Dial In Number: 1-888-861-1254 / PIN: 627049

**FINAL QUESTIONS DUE:** April 12, 2019 at 4:00 P.M.

**BID DUE DATE:** April 24, 2019 at 10:00 A.M.

**SUBMIT TO:** Procurement Office of the  
St. Louis Public Schools  
Second Floor – Cashier's Window  
801 North 11<sup>th</sup> Street  
St. Louis, Missouri 63101

Number of copies required: one (1) marked "**Original**", five (5) marked "**Copies**", and two (2) **electronic flash drives**. Each original and copy must have tabs corresponding to the required sections listed in this RFP, as appropriate. Original and copies are to be submitted in 3-ring binders or binding of some fashion.

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**Section 1. INTRODUCTION AND ANNOUNCEMENT FOR SEALED PROPOSALS**

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**INTRODUCTION:**

The Special Administrative Board of the Transitional School District of the City of St. Louis (d/b/a St. Louis Public School System) (the “District” or “SLPS”) wishes to contract with a firm to provide enrollment and eligibility services for SLPS's active employee medical, prescription drug, dental, vision, basic and supplemental life insurance, dependent life insurance, employee accidental death and dismemberment insurance, flexible spending accounts for health care reimbursement and dependent care reimbursement, COBRA continuation coverage, and ongoing dependent audit services. The contract will be for one year, January 1 – December 31, 2020, with an option to renew annually for two one-year terms.

**NOTICE TO BIDDERS:**

Copies of this RFP #028-1819 for the Enrollment & Eligibility Services, FSA/Section 125 Administration, COBRA Administration and Dependent Audit Services (this “RFP”) may be obtained from the District’s website at [www.slps.org](http://www.slps.org) under “Site Shortcuts”, “Purchasing / RFPs”, or from the Procurement Department, St. Louis Public Schools, 801 North 11<sup>th</sup> Street, St. Louis, MO 63101.

The District reserves the right to accept or reject any or all Proposals (as hereinafter defined) and to waive any irregularities. The District also reserves the right to negotiate with selected firms regarding pricing and fee structures and all other aspects of the Proposals. All information included in a Proposal may be incorporated, at the District’s sole option, into the contract for the Enrollment & Eligibility Services, FSA/Section 125 Administration, COBRA Administration and Dependent Audit Services to be entered into between the District and the successful Bidder (as hereinafter defined). Any contract awarded as a result of this RFP will be awarded without discrimination on the basis of race, color, religion, age, sex, sexual orientation or national origin.

**Section 2. TENTATIVE RFP TIMELINE**

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<b>Date of Issuance</b>	<b>March 11, 2019</b>
<b>Questions Due</b>	<b>March 29, 2019, 4:00 P.M.</b>
<b>Bidder’s Conference Call</b>	<b>April 05, 2019 at 10:00 A.M.</b> <b>Dial In Number: 1-888-861-1254 / PIN: 627049</b>
<b>Final Questions Due</b>	<b>April 12, 2019 at 4:00 P.M.</b>
<b>Proposals Due</b>	<b>April 24, 2019 at 10:00 A.M.</b>

The District reserves the right to modify the above RFP Timeline as needed by posting the change as an addendum to this RFP on the District website.

### Section 3. INSTRUCTIONS TO BIDDERS/GENERAL INFORMATION

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- 3.1 Form of Submissions.** Each person or entity submitting a response to this RFP (each “Bidder”) should prepare and submit their proposal in response to this RFP (“Proposal”) in a sealed envelope or box. **The Proposal shall include one (1) original, five (5) copies and two (2) electronic copies on flash drives.** The upper left hand corner of the package (envelope or box) shall be plainly marked as **RFP #028-1819. Enrollment & Eligibility Services, FSA/Section 125 Administration, COBRA Administration and Dependent Audit Services**, along with the firm name and the package shall be addressed to:

**The St. Louis Public Schools  
Treasury Department, 2<sup>nd</sup> floor  
801 North 11<sup>th</sup> Street  
St. Louis, MO 63101**

- 3.2 Manner of Submission** – The sealed Proposal must be received at the address listed in Section 3.1 on or before **10:00 A.M. on April 24, 2019**. Each Proposal will be date and time stamped upon receipt at Treasury Department. Proposals received after that date and time will not be considered and will remain unopened. Proposals must be filled out as requested including all required signatures and pertinent information. Failure to do so is reason for rejection of the Proposal. If Bidder is a corporate entity, the entity’s name must be correctly stated, and the Proposal must include the state of incorporation of such entity, and, if a foreign entity, proof of registration to transact business in the state of Missouri. A person with the authority to act on behalf of the entity (i.e. an authorized agent of the entity) must sign his or her name on the Proposal.
- 3.3 Format of Proposal** - Each Proposal must include the information required in Section 5- and the Vendor Questionnaire (completed and submitted in excel format). Each required response listed in Section 5 shall be included as a required document with Attachment B.
- 3.4 Questions About this RFP** - All questions regarding this RFP shall be made electronically via e-mail in writing and directed to **Robert Horton at Robert.Horton@slps.org**. The subject of the e-mail shall be “QUESTION - RFP #028-1819”.
- 3.5** Failure to provide the correct RFP number in the email will deem the question unanswerable and will not be considered as part of any addenda. Any questions submitted after the dates and times listed in Section 2 above shall not be considered or answered. Questions properly submitted **in writing** prior to the due date will be addressed at the Bidder’s Conference (as hereinafter defined) at the date and time set forth in Section 2 and will be handled pursuant to Section 4. Answers to all properly submitted **written** questions will be posted on the District’s website at [www.SLPS.org](http://www.SLPS.org) as addenda no later than three (3) business days prior to the Proposal Due Date.
- 3.6 Addenda** - The District may revise this RFP by issuing written addenda. Addenda will be posted to the District’s website at [www.SLPS.org](http://www.SLPS.org) under “Site Shortcuts”, “Purchasing / RFPs”. Interested persons or entities are encouraged to check the District’s website frequently for addenda to this RFP. Bidders are responsible for viewing and understanding information in addenda to the same extent as the RFP. The District has no obligation or duty to communicate addenda to Bidders beyond the posting of addenda on its website.

- 3.7 Awards** – All Proposal selections must be approved by the Special Administrative Board prior to an award being final. Awards will be made to the lowest responsible bidder complying with the terms of these specifications, except that the right is reserved by the District to make such selection, as in its judgment, is best suited for the purpose intended. Notwithstanding anything contained herein to the contrary, a contract shall not exist between the District and the selected Bidder until: A) such agreement has been duly authorized and approved by the Special Administrative Board; and B) the agreement has been documented in accordance with Missouri Revised Statutes Section 432.070. After approval by the Special Administrative Board, all awards will be posted on the District website. A contract awarded pursuant to this RFP may not be assigned to any other entity without the express written authorization of an authorized agent of the District.
- 3.8 Rejection of Proposals** – The District reserves the right to accept or reject any Proposal or any part of any Proposal.
- 3.9 Submitted Proposals Considered Final** – All Proposals shall be deemed final, conclusive and irrevocable, and no Proposal shall be subject to correction or amendment for any error or miscalculation.
- 3.10 Form of Contract** – Each successful Bidder shall be required to enter a contract in the form prescribed by the District. Templates of certain form contracts may be examined at the Department of Procurement, 801 North 11<sup>th</sup> Street, St. Louis, MO 63101 or may be found on the District’s website at [www.SLPS.org](http://www.SLPS.org) under “Site Shortcuts”, “Purchasing / RFPs”, “Contract Templates”. See Attachment I for the contract template to be used with the successful vendor. The District reserves the right to revise such templates or present a contract not contained within the template forms on the District’s website, in its sole and absolute discretion, to fit the unique situation presented by this RFP.
- 3.11 Preference for Missouri Products** – The District prefers to purchase those materials, products and supplies, which are produced, manufactured, compounded, made or grown, within the State of Missouri. When they are found in marketable quantities in the State of Missouri, and are of a quality suited to the purpose intended, and can be secured without additional cost over out-of-state products. Quality and fitness of articles will be considered in making purchases or letting contracts.
- 3.12 Prevailing Wage (if applicable)** - Bidder and their subcontractors shall be required to submit weekly payroll sheets with their monthly invoices, compliance to the Prevailing Wage Standard, as well as an Affidavit of Compliance with Prevailing Wage Law at the conclusion of the project, prior to final payment
- 3.13 Taxes** – Bidders shall NOT INCLUDE FEDERAL EXCISE TAX, TRANSPORTATION TAX, and/or STATE RETAIL TAX in the Proposal, as these taxes do not apply to the District.
- 3.14 War Clause** – In the event that during the existence of a state of war, the United States Government takes over the plant of any manufacturer with whom the contractor has thereto fore contracted to furnish the articles required under his contract with the District, or any essential element thereof, and because of such action of the government, the contractor may furnish and deliver the articles required under the contract.

- 3.15 Purchasing Card (“P Card”) – NOT APPLICABLE:** ~~The St. Louis Public School District is now processing vendor payments through a Purchasing Card (“P Card”) Program with MasterCard. The “P Card” Program is a more simplified, efficient and cost effective method of remitting payments for approved expenditures. This payment program provides a faster payment to the vendor without the cost of check processing. For purchases of goods and materials, the “P Card” is the SLPS preferred method of payment and the District reserves the right to make usage of the “P Card” a requirement. Acceptance of the “P Card” is one of the evaluation criteria that may be used in the review of vendor responses to this RFP (See Section 6.2).~~
- 3.16 Compensation** – Bidders are cautioned that items and/or services must be furnished at the price submitted. No increase in price will be permitted during the term of the contract.
- 3.17 Grievances** - Any complaints or grievances concerning or arising out of this RFP shall be submitted in writing to Procurement Office of the St. Louis Public Schools, 801 North 11<sup>th</sup> Street, St. Louis, MO, 63101, with a copy to Office of the General Counsel, c/o the Superintendent of Schools, 801 North 11<sup>th</sup> Street, St. Louis, MO 63101.

#### **Section 4. BIDDER’S CONFERENCE**

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- 4.1** Interested persons or entities may attend in person or by conference call an optional pre-submittal bidder’s conference (the “Bidder’s Conference”). Attendance is not mandatory for responding to this RFP. At the Bidder’s Conference, a representative from the District will be available to answer **questions properly submitted in writing** pursuant to the process set forth in Sections 3.4 and 3.5 above. Meeting minutes will be taken during the question and answer portion of the Bidder’s Conference and posted on the website as an addendum to the RFP pursuant to Section 3.5.
- 4.2** Please RSVP via email to **Robert Horton at Robert.Horton@slps.org** on or before **April 4, 2019**, if you plan to attend the bidder’s conference for this RFP. The subject of the e-mail shall be “**BIDDER’S CONFERENCE RSVP - RFP #028-1819**”. To participate in the conference call, use the following number: **Dial In Number: 1-888-861-1254 / PIN: 627049**.
- 4.3** No communication shall be made with any District employee, other than Robert Horton (Procurement Department), regarding this RFP. Violation of this provision may result in the rejection of Proposal.

#### **Section 5. THE PROPOSAL**

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- 5.1** The Scope of Services for this RFP is set forth in Attachment A.
- 5.2 Part I – Qualifications/Certifications/Resume and Operations Plan**  
The following information must be provided in Part I of the Proposal. The documents should be clearly marked: “Part I – Qualifications”
- 5.2.1 Bidders should provide detailed information addressing each of the following areas:

- 5.2.1.1 Licensing and certification in the field of the requested services;
- 5.2.1.2 Any citation or discipline action taken against the respondent by a licensing board or association related to the field of the requested services which is pending or has been resolved within the past 12 months;
- 5.2.1.3 Information regarding law suits relevant to the requested services that are pending or have been resolved within the past 12 months.
- 5.2.1.4 Failure to be forthright in disclosure shall be grounds for disqualification of a vendor. This section shall not be interpreted to require the disclosure of information shielded from disclosure by State or Federal Statutes and/or court order.

5.2.2 Please respond briefly, but completely, to the following:

- 5.2.2.1 Person/Entity Name
- 5.2.2.2 Address
- 5.2.2.3 Name and Title of Authorized Representative
- 5.2.2.4 Telephone Number
- 5.2.2.5 Fax Number
- 5.2.2.6 Email Address
- 5.2.2.7 Include the above information for each person/entity that is part of the project team for this Proposal

5.2.3 Bid Response Elements

- 5.2.3.1 Entity Qualifications
- 5.2.3.2 References (other school districts where possible)
- 5.2.3.3 Brief description of entity's experience with providing the requested services
- 5.2.3.4 Copies of Licenses and Certifications (including, but not limited to, license to conduct business in the City of St. Louis, Missouri)
- 5.2.3.5 Provide a brief summary of the primary role(s) and resumes describing the background and qualifications of each member of the project team for this Proposal.

### **5.3 Part II – Cost/Pricing Proposal**

The following information must be provided in Part II of the Proposal. The Proposal should be clearly marked: "Part II – Cost/Pricing Proposal"

- 5.3.1 Attachment B – Cost/Pricing Proposal must be used as the first page for this Part II.
- 5.3.2 Outline specifically the cost/pricing proposal for the fees and reimbursable expenses proposed. This proposal should include the method of pricing as well as the proposed fees/costs.
- 5.3.3 The Cost/Pricing proposal should be specific, and the detail of the cost/pricing should give the District a clear picture of overall costs as well as pricing criteria.

#### 5.4 Part III – Required Documents

The following information must be provided in Part III of the Proposal. The Proposal should be clearly marked: “Part III – Required Documents”

- 5.4.1 Attachment C - Federal Work Authorization Program Addendum and Affidavit
- 5.4.2 Attachment D - Bidder Affirmation Form
- 5.4.3 Attachment E - Bidder Checklist
- 5.4.4 Attachment F – Non-Submittal Form – **Submit only if declining to respond to RFP**
- 5.4.5 Attachment I - Contract Template - Each bidder is required to include, as part of the documents submitted with its Proposal, the actual contract the bidder is proposing to enter into with SLPS that sets forth, in detail, the scope, terms, conditions, specifications, pricing and performance standards and guarantees contained in the bidder’s Proposal. Attached to this RFP is the SLPS contract form (See Attachment I) that must be used by each bidder. Each bidder must mark-up the SLPS contract form to include the scope, terms, conditions, specifications, pricing and performance standards and guarantees contained in its proposal. The bidder must submit in Microsoft Word documents, both clean and marked copies of its proposed revised SLPS contract form. The marked copy must show all changes the bidder proposes to make to the SLPS contract form. All information included in a Proposal may be incorporated, at the SLPS’s sole option, into the contract to be entered into between SLPS and the successful bidder.



**Section 6. EVALUATION CRITERIA, PROCESS AND CONTRACT AWARD**

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**6.1 Evaluation Criteria** - The following criteria will be used with the weighted values below to evaluate each Proposal received. The District reserves the right to request clarification to the Proposal in order to evaluate all proposals.

<b>Evaluation Criteria</b>	<b>Points</b>
Total Price and Cost Effectiveness of Proposal	25
Systems Capabilities	25
Demonstrated Record Keeping Capabilities	20
Experience in providing on-line, FSA, and COBRA services	15
Experience with School Districts	10
M/WBE Participation	5
<b>Total Points Possible</b>	<b>100</b>

**6.2 Bid Opening** – All Proposals received on or before the Proposal Due Date and Time shall be assembled and opened publicly promptly at that time in the District Offices located at 801 North 11<sup>th</sup> Street, St. Louis, MO 63101 in a conference room to be designated. All interested parties are welcome to attend.

**6.3 Evaluation** – The District will assemble a review committee to assist in evaluating all Proposals (the “Evaluation Team”). From this evaluation, the District may select a Bidder solely on the basis of submittals, or may additionally identify a short list of Bidders for possible interviews. The District may contact any or all respondents to clarify submitted information.

The Evaluation Team will consist of the following individuals:

<b>Title</b>
<b>Chief Human Resources Officer</b>
<b>Benefits Specialist</b>
<b>Benefits Consultant</b>
<b>Procurement Representative</b>
TBD

**6.4 Contracting** – Upon selection of a Bidder, the District will negotiate a scope of services and other terms and conditions of an agreement with the selected Bidder. If such negotiations are not successful, the District reserves the right to begin negotiations with other respondents.

## Section 7. MINORITY PARTICIPATION

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**7.1** It is the policy of the District to pursue the goal of at least 25% Minority Business Enterprise (MBE) and 5% Women's Business Enterprise (WBE) utilization in the provision of goods and services to the District while at the same time maintaining the quality of goods and services provided to the District through the competitive bidding process. It is the purpose of this policy to allow minority and women's business enterprises to expand their opportunities and capacities by participating in all District operated programs. The District has developed a plan for participation in projects by minority business. This plan includes the following elements:

- 7.1.1 **Outreach** – A commitment to make every effort to inform contractors of pending contract opportunities through advertisements, workshops, brochures, and availability of plans.
- 7.1.2 **Good Faith Effort** – A commitment to verify contractor solicitations to ensure that sufficient time and information are available to make a responsible reply.
- 7.1.3 **Identification and Recruitment** – A commitment to coordinate efforts with the City of St. Louis, Contract Office, in the development of potential minority contractor interest.
- 7.1.4 **Monitoring and Reporting** – A commitment to measure and report anticipated and actual MBE/WBE participation.

### **7.2 Discrimination In Employment By the Special Administrative Board**

7.2.1 During the performance of the contract, the SELECTED BIDDER agrees as follows:

- 7.2.1.1 The SELECTED BIDDER will not discriminate against any employees or applicants because of race, age, handicap, religion, gender, sexual orientation, national origin or ethnicity. The SELECTED BIDDER will take affirmative action to ensure that all qualified applicants will receive consideration for employment without regard to race age, handicap, religion, gender, sexual orientation, national origin or ethnicity.
- 7.2.1.2 The SELECTED BIDDER will, in all solicitations or advertisements for employees placed by or on behalf of the SELECTED BIDDER; state that all qualified applications will receive consideration for employment without regard to race age, handicap, religion, gender, sexual orientation, national origin or ethnicity.
- 7.2.1.3 The SELECTED BIDDER will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice advising that labor unions or workers representative of the Bidder's commitment under contracts with the District.
- 7.2.1.4 The SELECTED BIDDER will maintain and, upon request make available to the District all records and data necessary or useful to the review and monitoring of compliance with the non-discrimination clauses of this contract. In the event the SELECTED BIDDER fails or refuses to make such records available, this contract may be cancelled, terminated, or suspended in whole or

in part by the District, and the SELECTED BIDDER may be declared ineligible for further District contracts or subject to such other sanctions as the District deems appropriate.

7.2.1.5 The SELECTED BIDDER's non-compliance with the non-discrimination clauses of this contract, the contract may be cancelled, terminated, or suspended in whole or in part by the District, and the SELECTED BIDDER may be declared ineligible for further District contracts or subject to such other sanctions as the District deems appropriate.

### **7.3 Minority and Women Owned Business Enterprise Policies**

7.3.1 It is the policy of the District that minority and women-owned businesses shall have the maximum opportunity to participate in the performance of contracts utilizing District funds. MBE/WBE firms included in the respondent's submittal, either as prime consultants or subcontractors, must be certified by one or more of the following agencies on or before the date of the submission of qualifications:

#### **Missouri Division of Purchasing and Material Management**

Online: For MBE's: <http://www.oa.mo.gov/>

For WBE's: <http://www.oa.mo.gov/>

Phone: (573) 715-8130

#### **City of St. Louis: Disadvantaged Business Enterprise Program**

Online: <http://www.mwdbe.org/>

Phone: (314) 551-5000

#### **St. Louis Minority Business Council**

Online: <http://www.slmbc.org/>

Phone: (314) 241-1143

## **Section 8. RESERVATIONS / STIPULATIONS**

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**8.1** The District reserves the right, at its sole discretion, to A) reject any or all submittals when, in its opinion, it is determined to be in the public interest to do so; B) waive minor informalities of a submittal; C) cancel, revise, or extend this solicitation; D) request additional information deemed necessary; and E) extract, combine, and delete elements of individual proposals and to negotiate jointly or separately with individual respondents with respect to any or all elements of the proposal.

**8.2** This RFP does not obligate the District to pay any costs incurred by any respondent in the submission of a proposal or in making necessary studies or design for the preparation thereof, or for procuring or contracting for the services to be furnished under this RFP prior to the issuance of a valid contract under Missouri law. Such exemption from liability applies whether such costs are incurred directly by the Bidder or indirectly through the Bidder's agent, employees, assigns or others, whether related or not to the Bidder.

**8.3** The District will give preference to firms based in the bi-state St. Louis metropolitan area when other considerations are equal.

**8.4** Careful consideration should be given before confidential information is submitted to the District as part of this RFP Proposal. Review should include whether it is critical for evaluating a bid, and whether general, non-confidential information, may be adequate for review purposes. Any and all documents submitted by the respondent may become public if and when they are submitted to any advisory or legislative public body, or pursuant to the Missouri Sunshine Law. The Missouri Sunshine Law provides for public access to information the District possesses. Information submitted to the District that Bidders wish to have treated as proprietary and confidential trade secret information should be identified and labeled “Confidential” or “Proprietary” on each page at the time of disclosure. This information should include a written request to exempt it from disclosure, including a written statement of the reasons why the information should not be disclosed.

**8.5** Bidders acknowledge and agree, by submitting a Proposal, that:

8.5.1 Once a Bidder is selected for the engagement, all electronic, written and printed materials developed by such Bidder as a result of this engagement shall become the property of the District, and the District shall be entitled to use any and all such materials in any way desired by the District, in its sole and unfettered discretion.

8.5.2 The qualifications of each member of the respondent team are important criteria in the selection process. The selected Bidder will not be allowed to substitute any member of the team listed in the Proposal without prior written approval by the District. The District, in its sole and absolute discretion, reserves the right to accept or reject proposed changes to the team and personnel associated with the team and/or to negotiate the composition of the team.

8.5.3 Adherence to the schedule for the work is of critical importance to the District as time is of the essence, and agrees to dedicate the personnel listed in the Proposal to completing the work in accordance with the schedule outlined in this RFP. Bidders further acknowledge that the contract for the engagement may include significant liquidated damages for failure to perform in accordance with such schedule.

8.5.4 To having read this RFP in its entirety and agreeing to all terms and conditions set out in this RFP. Bidders also accept the responsibility to review and understand all applicable policies of the District, which may be found on the District’s website [www.slps.org](http://www.slps.org) under “Shortcuts”, “Board Policies”.

8.5.5 The District, and any consultants retained by the District, have the right to make any additional inquiry or investigation they deem appropriate to substantiate or supplement information contained in respondent’s submission, and authorize the release to the District and/or the District consultants of any and all information sought in such inquiry or investigation.

8.5.6 Under penalty of perjury, that to the best of his/her belief: A) the prices in the Proposal were arrived at independently and without collusion, consultation, communication, or agreement for the purpose of restricting competition as to any matter or agreement for the purpose of restriction competition as to any matter relating to such prices with any other Bidder, or any other competitor; B) unless otherwise required by law, the prices in this Proposal have not been knowingly disclosed by the Bidder, and will not be knowingly disclosed by the Bidder, prior to opening, directly or indirectly, to any other Bidder or competitor; and C) no attempt has been made or will be made by the Bidder to induce any other person, partnership, corporation, or entity to submit or not to submit a proposal in response to this RFP for the purpose of restriction competition.

- 8.5.7 It is not delinquent in any real estate, personal property, or earning taxes assessed against it or which it is obligated to pay to St. Louis, Missouri.
- 8.5.8 No fictitious name of any entity or person has been used in this Proposal, and no unidentified third-party will have an interest in any resulting contract or in the performance of any work under this Proposal.
- 8.5.9 It does not do business as or operate under any fictitious name.
- 8.5.10 It has only presented one Proposal in response to this RFP.
- 8.5.11 The Proposal is made in good faith.
- 8.5.12 It, its affiliates and subsidiaries, all their respective officers, directors, employees, and all team members listed in the Proposal have not been convicted of a felony within the last five (5) years, which felony is related in any way to providing the services and/or items referenced in this RFP, or to the competency of the service provider to perform under any resulting contract.
- 8.5.13 It, its affiliates and subsidiaries, all their respective officers, directors, employees, and all team members listed in the Proposal are not currently under investigation by any governmental agency and have not in the past four (4) years been convicted or found liable for any act prohibited by state or federal law in any jurisdiction, including conspiracy or collusion with respect to responding to any public contract.
- 8.5.14 It, its affiliates and subsidiaries, all their respective officers, directors, employees, and all team members listed in the Proposal have not been excluded from any procurement or non-procurement programs with the government as identified by the U.S. General Service Administration Office of Acquisition Policy.
- 8.6** Any misrepresentations or false statements contained in a response to this RFP or to any request for additional information related to this RFP, whether intentional or unintentional, shall be sufficient grounds for the District to remove respondents from competition for selection at any time.
- 8.7** Bidders shall ensure that no improper, unethical, or illegal relationships or conflicts of interest exist between the Bidder, any employee, officer, director, or principal of the Bidder or District and any other party. The District reserves the right to determine the materiality of such relationships, when discovered or disclosed, whether intended or not. The District also reserves the right to decide in its sole and absolute discretion whether disqualification of the Bidder and/or cancellation of the award shall result. Such disqualification or cancellation shall be without fault or liability to the District. In the event that the District disqualifies a Bidder based on such an improper communication or relationship, and that Bidder's Proposal would have otherwise been considered the lowest responsible bid complying with the terms of these specifications, the District reserves the right to select as the winning Proposal the next most qualified responsible bidder complying with the terms of these specifications.
- 8.8** Bidders agree that they will comply with all applicable federal, state, and local laws, regulations, ordinances, and other requirements that apply to the scope of work in this RFP, including, but not limited to, all reporting and registration requirements. Bidders further agree that this RFP and any contract awarded pursuant to it will be governed under the laws of the State of Missouri.

**Section 9. FEDERAL WORK AUTHORIZATION PROGRAM (“E-VERIFY”)**

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Pursuant to Missouri Revised Statute 285.530, all Bidders awarded any contract in excess of five thousand dollars (\$5,000) with a Missouri public school district must, as a condition to the award of any such contract, be enrolled and participate in a federal work authorization program with respect to the employees working in connection with the contracted services being provided, or to be provided, to the District (to the extent allowed by E-Verify). In addition, the Bidder must affirm the same through sworn affidavit and provisions of documentation, and sign an affidavit that it does not knowingly employ any person who is an unauthorized alien in connection with the services being provided, or to be provided, to the District. Such agreement and affidavit is included as Attachment C to this RFP.

## ATTACHMENT A

### RFP #028-1819 Enrollment & Eligibility Services, FSA/Section 125 Administration, COBRA Administration and Dependent Audit Services

## Scope of Services

The Scope of Services includes the below enumerated general areas for SLPS's active employee medical, prescription drug, dental, vision, basic and supplemental life insurance, dependent life insurance, employee accidental death & dismemberment insurance, flexible spending accounts for health care reimbursement and dependent care reimbursement, COBRA continuation coverage, and ongoing dependent audit services. Submitted proposals must include the scope of services for all such plans.

The final scope of services and related schedules will be contained in a Benefits Administration Manual to be prepared by the selected vendor, approved by SLPS, and made a part of the executed contract.

1. Eligibility Calculations and Maintenance, including administration of SLPS and vendor eligibility rules, interfacing with SLPS payroll system, interfacing with SLPS vendors, making current and required changes to the eligibility files, providing premium reports, providing eligibility information reports and updates, and related reporting.
2. Member Call Center Services for members, SLPS representatives, and vendors, including enrollment support and assistance, coverage verification, answer questions, resolve problems, and related reporting and documentation. The member call center acts as a resource for members with benefit related inquiries, such as enrollment, coverage eligibility, premium cost, who to contact at the specific benefit vendor, etc.
3. Administer web-based enrollment and changes, including all open enrollment activities, eligibility elections, dependent information, family status changes, personalized electronic and mail confirmations to employees, daily interface with SLPS and vendor systems, maintain on-line forms, maintain on-line inquiries, and related reporting and documentation. An on-line inquiry function is to be maintained to allow members, SLPS representatives, and vendors to submit inquiries and obtain responses on-line.
4. Administer annual open enrollment period and benefit effective date. Administer periodic, special or off-cycle open enrollment periods and benefit effective dates. The current annual open enrollment period is completed with 2 open enrollment periods during October and November, after the 1<sup>st</sup> open period a confirmation statement is sent to each individual and then a 2<sup>nd</sup> enrollment period is made available for changes. The current benefit effective date is January 1st.
5. Produce and distribute personalized enrollment book/worksheets to employees for open enrollment, new hires, employment status, benefit coverage change events, and related reporting and documentation.
6. Produce and distribute employee and COBRA participant billing statements and collect payments from employee and COBRA participants. (Employee billing would occur in situations such as FMLA leave, where the employee is not receiving a paycheck from SLPS.)
7. Transmit related reporting and payments to SLPS, its designees, and its vendors.
8. Participate in required SLPS meetings and conference calls.
9. COBRA and HIPAA administration services

10. Flexible Spending Account administration services for health care and dependent care accounts and other benefits selections.
11. Verify dependent eligibility and accuracy for new hires and change in status.

## SLPS Plan Overview

### Client Address

801 North 11<sup>th</sup> Street  
St. Louis, MO 63101

**Proposed Effective Date:** Assume January 1, 2020, to be determined based on responses to RFP and mutually agreed upon timeline with finalist(s).

**Benefit Period:** January 1 – December 31

**Benefit Eligibility Waiting Period:** First of the month following date of hire. Employees are automatically enrolled in base medical, dental, vision, and basic Life/AD&D even if an enrollment form is not completed.

### Approximate Number of Employees enrolled in Medical by election tier as of January 2019:

EE Only – 2,867  
Employee + Spouse – 49  
Employee + Children – 384  
Family - 113

**Approximate Number of Enrolled Dependents as of January 2019:** 1,120

**Pay Periods Per Year:** The majority of active employees are non 12-month EE's with some 12-month EEs, with 20 voluntary deductions for the non 12-month employees and 24 voluntary deductions for the 12-month employees during the calendar year. There are some employees at are 10.5-month and 11-month employees with 20 voluntary deductions during the calendar year.

### SLPS Human Resource Information System:

The SAP System, version ECC 6.0 for Finance, Human Resource and Payroll  
The District is moving to

### Data File Exchange between SLPS and the Current Benefit Administration Vendor

Currently, SLPS exchanges benefits data files through a secure FTP site hosted by the benefits administration vendor.

- Outgoing :

- Employee eligibility file

- Frequency : Weekly
- Only Active Employees are passed on the file. Once an employee is passed as “retiree status” the first time they are no longer passed on the file as active.



- File contains employee benefit eligibility status, employee status (active/retired/terminated), status date, name, address, DOB, SSN, and DOH. Salary information is passed. It also includes info for employees on personal leave if they are still benefit eligible.

Flexible Spend deduction file

- Frequency : Biweekly (on pay day)
- File contains employee number, flexible account type (health or dependent care), amount deducted and date

- Incoming: Payroll update file:

- This file is used to update employee benefit information in SAP based on enrollment changes provided by the benefits administration vendor (adds/updates/deletes)
- Frequency: Bi-weekly
- File contains the following information:
  1. Employee ID
  2. Deduction code (MED/DTL/VIS/LIF/SUP/HCA/DCA)
  3. Deduction option (corresponds to carrier code)
  4. Deduction level (employee only; employee + family etc.)
  5. Deduction amount
  6. Coverage effective date
  7. Transaction type (change/add/stop)
- This same file format is used yearly during open enrollment. The bi-weekly file is a change only file. The open enrollment file is a full file.

### SLPS Payroll System Overview

The following is an overview of SLPS' Payroll System.

- SLPS performs the payroll function in-house utilizing SAP.
- In 2013 SLPS issued approximately 5300 W-2s.
- All employees are part of PERSONNEL AREA 'PA01'
  - Employees are further divided into the following four subgroups:
    1. PSO1      10 month employees
    2. PSO2      10.5 month employees
    3. PSO3      11 month employees
    4. PSO4      12 month employees
  - For PAYROLL processing purposes, employees are divided into three 'PAYROLL AREAS':
    1. S2          10.5 month employees
    2. S3          10 and 11 month employees
    3. S4          12 month employees
  - Within each of the three areas employees are further defined by an EMPLOYEE GROUP identifier:
    1. A          Exempt Permanent
    2. B          Non-Exempt Permanent
    3. S          Substitutes
    4. T          Temporary Employees
    5. L          Long Term

- Various EMPLOYEE SUB-GROUPS further define the type of employee.
- All employees are paid bi-weekly on Fridays. Payday is one week after the close of the two week pay period. (The 'pay-week' is defined as Saturday thru Friday). The payroll system is 'locked' for processing at 12:00 p.m. on payweek Monday to Wednesday at noon of payweek. (pay-period END date).

Ex: Pay period begins on Saturday, November 17, 2012 Pay period ends on Friday, November 30, 2012 Payroll is 'locked for processing' on Monday, December 3, 2012. Pay date is Friday, December 7, 2012.

- Each type of individual payment or deduction is managed in the format of a WAGE TYPE. Each WAGE TYPE is a 4-digit code, and has the ability to hold a value for a Number, Rate and Amount.
- Employees who are in the S2 and S3 PAYROLL AREAS have their voluntary deductions taken over 20 pay periods. For 12 month employees, the S4 PAYROLL AREA has deductions taken from their pay over 24 pay periods (in months that three paydays occur - which is twice a year - the third payday is a non-deduction pay period).

Ex: If the total annual deduction is \$300, the pay period deduction for and S2 or S3 employee would be \$15.00 - for an S4 employee the amount would be \$12.50.

- Employee deductions are entered into SAP with beginning and ending dates. The beginning date should be the first day of the first pay-period the deduction should be taken, and the ending date the last day of the final pay-period the deduction should be taken. These dates are able to be modified.

### **Commissions**

USI Insurance Services LLC has a consulting agreement in place with St. Louis Public Schools, PLEASE QUOTE ALL SERVICES NET OF COMMISSIONS. Due to the consulting agreement between USI Insurance Services LLC and the St. Louis Public Schools, USI Insurance Services LLC is barred from receiving compensation from third parties including but not limited to insurance commissions, referral or finder fees, administrative fees, management fees, bonuses or other amounts or reductions in fees owed to any third party by reason of its services to the St. Louis Public Schools.

### **Data Provided –**

- **2019 Enrollment Book including CIS Matrix**

# Qualifications of Bidders

1. The company must have experience in the benefit administration services described.
2. The company must have the appropriate licensure or authority to do business in the State of Missouri.
3. By submitting a Proposal, the company certifies that it is not currently debarred from submitting proposals for contracts with any political subdivision or agency of the State of Missouri, and it is not an agent or a person or entity that is currently debarred from submitting proposals for contracts issued by a political subdivision or agent of the State of Missouri.
4. The company must, in advance of the selection date, have the manpower and equipment necessary to render the program fully operational on January 1, 2020. The company's submitted proposal must provide a detailed plan describing the manpower, equipment, systems, and other resources available to render the program fully operational.
5. Company **MUST** provide an implementation timeline clearly outlining all items necessary for a smooth implementation.
6. The company must be financially stable and solvent satisfactory to SLPS. The company must supply two years of audited financial statements to SLPS upon request.
7. The company must permit SLPS's representatives access to visit its operation and local service offices prior to contract award, if so desired by SLPS.
8. The company must maintain a local and/or toll-free call center phone number available for use by SLPS employees and dependents participants for questions, inquiries, and enrollment activities.
9. The company must be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA).
10. Consideration will be given to those companies that provide a multi-year rate guarantee.
11. The company must be an equal opportunity employer.
12. The company must have web-based enrollment capability.

**ATTACHMENT B**

**RFP #028-1819 ENROLLMENT & ELIGIBILITY SERVICES, FSA/SECTION 125 ADMINISTRATION,  
COBRA ADMINISTRATION AND DEPENDENT AUDIT SERVICES**

**COST / PRICING PROPOSAL**

- 
1. The following describes our cost/pricing proposal to provide services specified in Attachment A – Scope of Services of the RFP #028-1819. Enrollment & Eligibility Services, FSA/Section 125 Administration, COBRA Administration and Dependent Audit Services , dated March 22, 2019.

Elements of Cost / Pricing	Cost
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
<b>Total</b>	\$ _____

2. Brief Explanation of the Services to be provided under the above cost/pricing proposal.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Optional Proposal

Elements of Cost / Pricing	Cost
_____	\$ _____
_____	\$ _____
_____	\$ _____
<b>Total</b>	\$ _____

4. ANNUAL INCREASES IF RENEWED:

(2021 - 2022) \_\_\_\_\_ %  
(2022 - 2023) \_\_\_\_\_ %

5. Please attach the detail addressing Sections 5.3.2 and 5.3.3 as Attachment B, Exhibit 1.

\_\_\_\_\_  
Signature of Authorized Official

\_\_\_\_\_  
Date

\_\_\_\_\_  
Company Name

**ATTACHMENT C**

**E-VERIFY AGREEMENT**

**[Name of Vendor]:**

a) Agrees to have an authorized person execute the “Federal Work Authorization Program Affidavit” attached hereto and deliver the same to The Special Administrative Board of the Transitional School District of the City of St. Louis (d/b/a St. Louis Public School System) (“District”) prior to or contemporaneously with the execution of a contract with the District;

b) Affirms it is enrolled in the “E-Verify” (formerly known as “Basic Pilot”) work authorization program of the United States, and are participating in E-Verify with respect to your employees working in connection with the services being provided (to the extent allowed by E-Verify), or to be provided, by your company to the District;

c) Affirms that it is not knowingly employing any person who is an unauthorized alien in connection with the services being provided, or to be provided, by your company to the District;

d) Affirms you will notify the District if you cease participation in E-Verify, or if there is any action, claim or complaint made against you alleging any violation of Missouri Revised Statute 285.530, or any regulations issued thereto;

e) Agrees to provide documentation of your participation in E-Verify to the District prior to or contemporaneously with the execution of its contract with the District (or at any time thereafter upon request by the District), by providing to the District an E-Verify screen print-out (or equivalent documentation) confirming your participation in E-Verify;

f) Agrees to comply with any state or federal regulations or rules that may be issued subsequent to this addendum that relate to Missouri Revised Statute 285.530; and

g) Agrees that any failure by your company to abide by the requirements a) through f) above will be considered a material breach of your contract with the District.

By: \_\_\_\_\_  
(Signature)

Printed Name and Title: \_\_\_\_\_

For and on behalf of: \_\_\_\_\_  
(Company Name)

**FEDERAL WORK AUTHORIZATION PROGRAM AFFIDAVIT**

I, \_\_\_\_\_, being of legal age and having been duly sworn upon my oath, state the following facts are true:

1. I am more than twenty-one years of age; and have first-hand knowledge of the matters set forth herein.

2. I am employed by \_\_\_\_\_ (hereinafter "Company") and have authority to issue this affidavit on its behalf.

3. Company is enrolled in and participating in the United States E-Verify (formerly known as "Basic Pilot") federal work authorization program with respect to Company's employees working in connection with the services Company is providing to, or will provide to, the District, to the extent allowed by E-Verify.

4. Company does not knowingly employ any person who is an unauthorized alien in connection with the services Company is providing to, or will provide to, the District.

**FURTHER AFFIANT SAYETH NOT.**

By: \_\_\_\_\_ (individual signature)

For \_\_\_\_\_ (company name)

Title: \_\_\_\_\_

STATE OF MISSOURI)

) ss.

COUNTY OF \_\_\_\_\_ )

On this \_\_\_ day of \_\_\_\_\_, 20\_\_\_, before me, \_\_\_\_\_, a Notary Public in and for such County and State, personally appeared \_\_\_\_\_ of \_\_\_\_\_, known to me to be the person who executed the affidavit on behalf of said \_\_\_\_\_ and acknowledged to me that he or she executed the same for the purposes therein stated. Subscribed and affirmed before me this \_\_\_ day of \_\_\_\_\_, 20\_\_\_.

\_\_\_\_\_  
Notary Public  
My commission expires on: \_\_\_\_\_

**ATTACHMENT D  
BIDDER AFFIRMATION FORM**

**RFP TITLE: Enrollment & Eligibility Services, FSA/Section 125 Administration, COBRA Administration and Dependent Audit Services**

**RFP #: 028-1819**

NAME OF BIDDER: \_\_\_\_\_

After careful consideration of the solicitation document in its entirety, Request for Proposal for RFP #028-1819, Enrollment & Eligibility Services, FSA/Section 125 Administration, COBRA Administration and Dependent Audit Services, and any addendum(s) issued, the undersigned proposes to satisfy all requirements in accordance with said documents.

The Bidder's Checklist in Attachment E of the RFP has been complied with, is completed, and is enclosed with this Proposal.

For consideration of this proposal, the undersigned hereby affirms that (1) he/she is a duly authorized official of the company, (2) that the offer is being submitted on behalf of the bidder in accordance with any terms and conditions set forth in this document and (3) that the company will accept any awards made to it as a result of the offer submitted herein for a minimum of one year following the date of submission.

If notified in writing by mail or delivery of the acceptance of these documents, the undersigned agrees to furnish and deliver to the District within three (3) days, proof of liability insurance.

The District shall provide the Bidder with a contract agreement, which will set forth the terms of this agreement. The contract shall be interpreted, construed and given effect in all respects according to the laws of the State of Missouri.

**Nondiscrimination in Employment:** We the supplier of goods, materials, equipment or services covered by this proposal or contract have not discriminated in the employment, in any way, against any person or persons, or refused to continue the employment of any person or persons on account of their race, creed, color, or national origin.

Respectfully submitted, Authorized Official: Title \_\_\_\_\_

\_\_\_\_\_  
Print Name Signature Date

\_\_\_\_\_  
Address

(\_\_\_\_) \_\_\_\_\_ (\_\_\_\_) \_\_\_\_\_ \_\_\_\_\_  
Business Telephone Number Facsimile E-Mail Address

The full names and addresses of persons and organizations interested in the foregoing Request For Proposal as principals of the company are as follows:  
\_\_\_\_\_

**ATTACHMENT E  
BIDDER CHECKLIST**

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**RFP TITLE: Enrollment & Eligibility Services, FSA/Section 125 Administration, COBRA Administration and Dependent Audit Services**

**RFP #: 028-1819**

- ( ) Submitted all information as requested.
- ( ) Received \_\_\_\_\_ number of addendum(s).
- ( ) Submitted one (1) original, (5) copies and (2) Electronic Proposals on flash drives.
- ( ) Signed Federal Work Authorization Program Agreement.
- ( ) Signed and notarized Federal Work Authorization Program agreement and affidavit
- ( ) Signed Bidder Affirmation Form (by an authorized official of the company where appropriate).
- ( ) Signed and dated Cost / Pricing Proposal.
- ( ) Clean and marked copies of the SLPS contract form
- ( ) No conditions or restrictions have been placed by the company on this Proposal that would declare it non-responsive.
- ( ) Prepared to provide the insurance required.
- ( ) Submitted a copy all certificates and license including, but not limited to, the license (to conduct business in the City of St. Louis, Missouri).
- ( ) Submitted state tax identification number. \_\_\_\_\_

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**Signature of Authorized Official**

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**Date**

---

**Company Name**



**ATTACHMENT F**  
**NON-SUBMITTAL RESPONSE FORM**

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**RFP TITLE: Enrollment & Eligibility Services, FSA/Section 125 Administration, COBRA Administration and Dependent Audit Services**

**RFP #: 028-1819**

**NOTE TO BIDDER:**

If your company's response is a "non-submittal", the District is very interested in the reason for such response since the District desires to ensure that the procurement process is fair, non-restrictive and attracts maximum participation from interested companies. We, therefore, appreciate your response to this non-submittal response form.

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Please indicate your reason for responding with a "non-submittal":

- Unable to meet the requirements for this project.
- Unable to meet the time frame established for start and/or completion of the project.
- Received too late to reply. Received on \_\_\_\_\_ .
- Please remove our company's name from receiving similar type solicitations.
- Other: \_\_\_\_\_

---

Your response will be given careful consideration, and included in the contract file. Your input will assist the District in determining changes necessary to increase participation and competition.

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<b>Authorized Signature</b>	<b>Title</b>	<b>Date</b>
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**Name of Company / Consultant**

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**Company Address**

( ) _____	( ) _____
<b>Business Telephone Number</b>	<b>Facsimile</b>

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**E-Mail Address**