



REQUEST FOR PROPOSAL
RFP 2008-012

ADDENDUM NO. 3

To: Prospective Bidders

From: Llew F. Perry 
Cooperative Educational Services

Date: May 5, 2008

CES has received the following question regarding RFP 2008-012 by e-mail. Please accept the following as responses to the questions submitted.

Submitted by: Dan Foley
dan@foleyinsuranceagency.com
Received May 2, 2008

Question 1:

Can you apply to provide only one of the services under the categories listed? My example would be if you only wanted to provide the Supplemental Life would you be allowed to submit a response for that one product?

Background:

RFP 2008-012, Section I: Instruction to Offerors, Item G: Listing of General Terms and Conditions, page 15.

Awarding of Contract – CES reserves the right to make multiple awards, to award the entire contract to one responsible Offeror, or to reject one or all proposals. A response to the RFP is an offer to contract with CES based upon the terms, conditions, scope of work and specifications contained in this Request for Proposal. An RFP does not become a contract unless, and until, CES signs the Acceptance of Offer and Contract Award document, eliminating the need for a formal signing of a separate contract.

RFP 2008-012, Section I: Instruction to Offerors, Item G: Listing of General Terms and Conditions, page 15.

Provider's Representative – Dealers or agents of employee benefit products and services, who, if permitted by the Scope of the Work, submit an offer as a provider's representative, must be able to submit with its' response a letter from the provider certifying that the Offeror is a bona fide dealer/agent for the specific products and services presented, that the contractor is authorized to submit an offer on such products/services, and which guarantees that should the dealer/agent fail to satisfactorily fulfill any obligations established as a result of the award of contract, the provider will either assume and discharge such obligations or provide for their competent assumption by one or more bona fide dealers/agents for the balance of the contract period.

RFP 2008-012, Section II; Scope of Work and Specifications, Item E: Listing of Categories, Page 29.

Based on its member's needs and requirements, CES has broken down this solicitation into two (2) categories: 1) to provide supplemental employee benefit products and services Relating to Section 125, 403(b), 401(b), 457(b), 3121, Life, Auto, Home Owners and Other Related Insurances; and 2) Qualified Provider of Professional Consulting Services Relating to Employee Retirement Benefit Programs and Employer's Verification, Audit and Compliance with Federal, State and Retirement Plan Rules, Regulations and Requirements. The Offeror may prepare and submit a response to either category, but not both.

Addendum #2, General Comments and Clarifications, CES Response:

In response to the proposed question stated above and to clarify the statement "The Offeror may prepare and submit a response to either category, but not both": presented in Section II: Scope of Work and Specifications, Item E: Listing of Categories, Page 29. CES is making the following modifications to RFP 2008-012.

Change Section II: Scope of Work and Specifications, Item E: Listing of Categories, Page 29 From:

"Based on its member's needs and requirements, CES has broken down this solicitation into two (2) categories: 1) to provide supplemental employee benefit products and services Relating to Section 125, 403(b), 401(b), 457(b), 3121, Life, Auto, Home Owners and Other Related Insurances; and 2) Qualified Provider of Professional Consulting Services Relating to Employee Retirement Benefit Programs and Employer's Verification, Audit and Compliance with Federal, State and Retirement Plan Rules, Regulations and Requirements. The Offeror may prepare and submit a response to either category, but not both."

Change To:

"Based on its member's needs and requirements, CES has broken down this solicitation into two (2) categories: 1) to provide supplemental employee benefit products and services Relating to Section 123, 403(b), 401(b), 457(b), 3121, Life, Auto, Home Owners and Other Related Insurances; and 2) Qualified Provider of Professional Consulting Services Relating to Employee Retirement Benefit Programs and Employer's Verification, Audit and Compliance with Federal, State and Retirement Plan Rules, Regulations and Requirements. If the Offeror is a single firm

and does not intend to act as a project manager/prime contractor who has obtained independent subcontractors (product and service providers) who will provide the products and services required under category 1 and different subcontractors who will provide products as requested under category 2, or is not in a group of firms submitting a joint proposal they may prepare and submit a response to either category, but not both.”

To clarify the change noted above please refer to the General Comments and Clarifications presented as part of this Addendum #2 to RFP 2008-012

As noted in the change depending on who is making the response and how the products and services requested by the individual categories are being delivered will determine the type and level of response submitted.

RFP 2008-012, Section II: Scope of Work and Specifications, Item E: Listing of Categories, Category 1, Category Scope of Work, page 29.

CES and its members are seeking a single contractor to provide the products and services requested. Most CES members now subscribe to one of the many Section 125 and voluntary, supplementary deferred compensation plans provided through its existing contractor and other non-CES vendors; however, a single provider can provide these and other services in a more efficient, cost effective manner, resulting in higher yields for program participants. CES is seeking a single company to administer, market and service CES members’ employees with a dedicated service approach.

The kinds and levels of professional services offered under this RFP must be broad enough to allow the CES members and their employees to obtain the necessary supplemental benefit products and services to meet their insurance and retirement needs. The Offeror must be able to design, develop, propose and, if awarded a contract, implement and conduct an employee’s supplemental benefit program in accordance with this RFP.

This is an indefinite delivery contract. No warranties or guarantees are made as to the extent of or level of services to be acquired/provided under this contract. During the last four years, 58 CES members with more than 6,000 employees are participating in the program. The Offeror should also take note that the final scope of work will be determined and based on the Offeror’s response to this solicitation, the negotiation of the awarded contract and shall include, but is not limited to, the following areas:

- Area 1 IRS Section 125
- Area 2 Retirement and Alternative Deferred Income Plans
- Area 3 Other Voluntary Benefits
- Area 4 Related Services

CES Response:

CES has interpreted the question to be in regards to Category 1, Products and Services. As noted in the Categorical Scope of Work and Specifications, “CES and its members are seeking a single contractor to provide the products and services requested”. Yes, CES is seeking a contractor(s) who possess the ability and capacity to provide products and services in all four (4) areas:

Area 1 - IRS Section 125, Area 2 - Retirement and Alternative Deferred Income Plans, Area 3 - Other Voluntary Benefits, Area 4 - Related Services.

CES is asking the offeror as part of their response to indicate for Category 1, for each area (Areas 1, 2, 3 and 4), the product provider(s) and product options that will be offered under each. In response to your “my example would be if you only wanted to provide the Supplemental Life would you be allowed to submit a response for that one product,” because this offering provides for Area 3 only and products for Areas 1, 2 and 4 would not be offered, this response would not meet the minimum category requirements and therefore would be non-responsive.

If you have any questions regarding this Addendum, please contact my office.

By dating, signing, and returning this page, the Offeror acknowledges receipt of Addendum No.3 (Please place behind Tab 1 of your response).

Date: _____ Company Name (Print): _____

Printed Name: _____ Signature: _____