

REQUEST FOR PROPOSALS

ADDENDUM # 2

ISSUED: April 4, 2013

RFP NUMBER: CSP901214
INDEX NUMBER: DAS062

The State of Ohio, through the Department of Administrative Services, Office of Procurement Services, for the Benefits Administration Services (BAS) is requesting proposals for:

**EXEMPT EMPLOYEE BASIC GROUP LIFE AND ACCIDENTAL
DEATH AND DISMEMBERMENT INSURANCE AND GROUP
VOLUNTARY SUPPLEMENTAL LIFE INSURANCE**

Reasons for Addendum: Remove language on page 25, change quantity on page 48, add additional information chart on page 64, add an additional census file on page 67 and a five-year rate history for Supplemental Life to page 67.

PROPOSAL DUE DATE: April 10, 2013

OPENING LOCATION: Department of Administrative Services
General Services Bid Desk
4200 Surface Road
Columbus, Ohio 43228-1395

If the Offeror's personnel are independent Contractors to the Offeror, the certification must also contain the following sentence:

(Insert Company name) affirms that it has obtained a written acknowledgement from its independent Contractors that they are separate and independent enterprises from the state of Ohio and the Department of Administrative Services and the Agency for all purposes including the application of the Fair Labor Standards Act, Social Security Act, Federal Unemployment Tax Act, Federal Insurance Contributions Act, the provisions of the Internal Revenue Code, Ohio tax law, worker's compensation law and unemployment insurance law.

3. Signed Contracts. The Offeror must provide two (2) originally signed, blue ink copies of the included Contract, Attachment Four. Offeror must complete, sign and date both copies of the Contract and include it with their Proposal. (Attachment Four).
4. Offeror Profile and Prior Projects. Each Proposal must include a profile of the Offeror's capability, capacity, and relevant experience working on projects similar to this Work. The profile must also include the Offeror's legal name; address; telephone number; fax number; e-mail address; home office location; date established; ownership (such as public firm, partnership, or subsidiary); firm leadership (such as corporate officers or partners); number of employees; number of employees engaged in tasks directly related to the Work; and any other background information that will help the State gauge the ability of the Offeror to fulfill the obligations of the Contract. The financial stability of the company should also be described and is considered a necessary component of this portion of the Proposal's response. This RFP includes Offeror Profile Summary Form as Attachment Five A which must be completed for the Offeror. The Offeror must use this form and fill it out completely to provide the Offeror requirement information.

The Offeror shall also provide information on the firm's background as well as evidence that it has in place the personnel, internal procedures, and any other resources required under the terms of the Contract to ensure successful performance and contract compliance. Offerors must describe current operational capacity of the organization and the Offeror's ability to absorb the additional workload resulting from this Project. Failure to recreate the form accurately to include all fields, may lead to the rejection of the Offeror's Proposal.

*The Offeror must document previous experience and expertise in providing a minimum of one (1) previous project, similar in size and complexity, in the previous five (5) years. These projects must be of similar size, scope and nature. Details of the similarities must be included. Attachment Five B must be filled out completely for each of the projects provided. The Offeror must use these forms and fill them out completely to provide the Offeror requirement information. Failure to recreate the form accurately to include all fields, may lead to the rejection of the Offeror's Proposal.

5. Offeror References. The Offeror must include a minimum of three (3) references for organizations and/or clients for whom the Offeror has successfully provided services on projects that were similar in their nature, size, and scope to the Work. These references must relate to work that was completed within the past five (5) years. This RFP includes an Offeror Reference Form as Attachment Six. Failure to recreate the form accurately may lead to the rejection of the Offeror's Proposal.

The State does not assume that since the experience requirement is provided at the top of the page that all descriptions on that page relate to that requirement. Offerors must reiterate the experience being described, including the capacity in which the experience was performed and the role of the Offeror on the Project. It is the Offeror's responsibility to customize the description to clearly substantiate the qualification. Previous experience must include the conduct, management, and coordination of projects. Incumbents must ensure specifics are addressed. Evaluations will not be based on intrinsic knowledge of evaluation committee members.

The description of the related service shows the Offeror's experience, capability, and capacity to develop this Project's deliverables and/or to achieve this Project's milestones. Details such as the size of the contracting organizations, duration of involvement, level of responsibility, significant accomplishments, as well as a thorough description of the nature of the experience will be required for appropriate evaluation by the committee.

- a. Contact Information. The contact name, title, phone number, e-mail address, company name, and mailing address must be completely filled out. If the primary contact cannot be reached, the same information must be included for an alternate contact in lieu of the primary contact. Failure to provide requested contact information may result in the State not including the reference in the evaluation process.
- b. Project Name. The name of the project where the mandatory experience was obtained and/or service was provided.
- c. Dates of Experience. Must be completed to show the length of time the Offeror performed the experience being described, not the length of time the Offeror was engaged for the reference. The Offeror must complete these dates with a beginning month and year and an ending month and year.
- d. Description of the Related Service Provided. The State does not assume that since the experience requirement is provided at the top of the page that all descriptions on that page relate to that requirement. Offerors must reiterate the experience being described, including the capacity in which the experience was performed and the role of the Offeror on the Project. It is the Offeror's responsibility to customize the description to clearly substantiate the qualification.

*Remove reference to Attachment Five C and D in item number 4, paragraph 3.

ATTACHMENT FIVE B
OFFEROR PRIOR PROJECT FORM – Reproduce if necessary for additional Projects

Customer Company Name:	Contact:	
Address:	Phone Number:	
	E-mail:	
Project Name:	Beginning Date of Project (Month/Year):	Ending Date of Project (Month/Year):
<p>*The Offeror must document previous experience and expertise in providing a minimum of one (1) previous project similar in size and complexity, in the previous five (5) years. These projects must be of similar size, over 10,000 employees, scope and nature. Details of the similarities must be included. Attachment Five B must be filled out completely for the one (1) project provided. The Offeror must use this form and fill it out completely to provide the Offeror requirement information. Failure to recreate the form accurately to include all fields, may lead to the rejection of the Offeror's Proposal.</p>		

*Change to one (1) previous project.

ATTACHMENT TWELVE
EXEMPT EMPLOYEE BASIC GROUP LIFE INSURANCE EXPERIENCE DATA

Active Employee Basic Life Experience_Analysis

INCURRED PERIOD	07/07 - 06/08	07/08 - 06/09	07/09 -06/10	07/10 - 06/11	07/11 - 06/12
Total Paid Claims	1,487,633	1,310,000	1,865,750	1,849,000	1,163,010
Paid Premiums	1,708,497	1,805,987	1,724,967	1,744,472	1,569,385
Paid Loss Ratio	87%	72.5%	108%	106%	74%

*

Basic Life Insurance	Policy Year				
	7/2007-6/30/2008	7/2008-6/30/2009	7/2009-6/30-2010	7/2010-6/30/2011	7/2011-6/30/2012
IBNR Reserve	131,487	4,234	-8,331	-4,271	-6,267
Conversion Charges	11,310	6,150	18,450	0	0

*Added additional information chart.

ATTACHMENT FIFTEEN
EXEMPT EMPLOYEE CENSUS



Exempt Employees Life RFP Census.xls



*

State of Ohio active employees with Opt life-ee-sp-child as of 04-01-2013.xls



**

Five Year Rate History -STATE OF OHIO OGL RATES.doc

* Added additional census file

**Added five year rate history