



Procurement Management Department
 2115 Second Street, 1st Floor
 Fort Myers, FL 33901
 Main Line: (239) 533-8881
 Fax Line: (239) 485-8383
www.leegov.com/procurement

Posted Date: March 1, 2024

Solicitation No.: RFP230620CJV

Solicitation Name: Employee Insurance Benefits Consultant and Actuarial Auditor

Subject: Addendum Number 2

The following represents clarification, additions, deletions, and/or modifications to the above referenced bid. This addendum shall hereafter be regarded as part of the solicitation. Items not referenced herein remain unchanged, including the response date. Words, phrases or sentences with a strikethrough represent deletions to the original solicitation. Underlined words and bolded, phrases or sentences represent additions to the original solicitation.

1. ATTACHMENT includes:

- a. Final Eligibility SPD 2022
- b. Retiree Participation in Benefit Plans
- c. Final SPD for Retirees and Health
- d. Aon Consulting, Inc. contract

2. QUESTIONS/ANSWERS

1.	Will this be for all departments of Lee County?
Answer	Yes
2.	How many total employees, full-time, part-time, retirees?
Answer	Retirees: 864 Full Time: 3669 Part Time: 39
3.	What is Lee County's eligibility for benefits?
Answer	See attached
4.	Who is the current vendor/consultant/broker?
Answer	Aon Consulting, Inc.
5.	Who is the current insurance provider for health, dental, life, disability and vision?
Answer	Aetna Life Insurance Company, Standard Insurance, VSP
6.	Who is the current stop loss carrier?
Answer	Aetna Life Insurance Company
7.	Is there a current Wellness Initiative in place?
Answer	The County has a robust wellness program sponsored by the County's health insurance carrier (Aetna) that includes one onsite Aetna Wellness Representative, as well as one Lee County staff member (Manager).
8.	Will the vendor/consultant/broker be able to advise on the retirement plan(s) as well?

Answer	The consultant may provide retirement plan information but is not ultimately responsible for retirement plan management as Lee County is a Florida Retirement System employer.
9.	Will the vendor/consultant be able to outsource the Actuarial Auditor and/or use the providing carrier to do so?
Answer	It is the County's intent to award to a single Vendor to provide all the full scope of services detailed in the solicitation document.
10.	Our firm is uniquely capable from an actuarial consulting and support perspective; however, we do not provide support around other post-employment benefit (OPEB) obligations. Would the County be willing to carve OPEB requirements out of this scope?
Answer	No.
11.	What are the top benefit-related challenges that the County is focusing on over the next three years?
Answer	Prescription drug costs including new to market, maintaining a high value health plan that complies with recent legislative changes, providing robust wellness opportunities to employees, controlling claims costs.
12.	What is the current consultant earning in total revenue? Publicly available information suggests that the current consultant is earning \$175,000. Is that information accurate?
Answer	Confirmed.
13.	What type of compensation arrangement does the County prefer (e.g. fee, commissions, fee plus commissions)?
Answer	Fee with no commission.
14.	In addition to standard benefit communication collaterals (i.e. Benefit guide, flyers, post-cards, etc.), would the County be interested in a scalable digital employee communications portal?
Answer	New strategies to enhance employee communications are welcome.
15.	Is the Negligence or Breach of Contract form required? We do not provide information of this type. As is common with other professional services firms, brokers and advisers, we are subject, in the ordinary course of business, to various actual and potential claims, lawsuits, investigations and other proceedings, whether or not it is at fault. These are not, however, expected to have a material adverse effect on the financial condition, results of operations or liquidity of our firm or any adverse effect on our ability to provide the services proposed.
Answer	A completed Form 4 is required with each firm's proposal. The information your firm chooses to provide on the form is up to your firm's discretion. If the form is not included in your submission, your firm may be found non-responsive.
16.	Please state the number of full-time, benefit eligible employees as well as the number of retirees enrolled in the county sponsored medical plan.
Answer	Retirees: 864 Full Time: 3669 Part Time: 39
17.	Please provide a copy of the current consultant agreement to include scope of work and compensation (whether flat fee or commission % by line of coverage).
Answer	See attached

18.	Which actuarial firm is the county currently utilizing to perform the County's RDS work, OPEB and 112.08 related services? Is it the county's intent for the selected broker/actuary to perform all of these services within their proposed fee. What is the fee currently being paid for these services (as applicable)?
Answer	Aon is the Consultant of Record. It is the County's intent to award this contract to a single Vendor for the entirety of the scope of services detailed in the solicitation document. The current annual contract value is \$175,000.
19.	How is open enrollment, eligibility administration and qualifying events currently handled? Does the county have an online enrollment/administration solution? If so, Please state the name of the system, who pays for the system (county, carrier or broker)?
Answer	The County is not currently using a separate enrollment system. All enrollment and qualifying event transactions are processed in HRIS system – PDS Vista.
20.	Please state the name of the county's current payroll system.
Answer	The County utilizes KRONOS for timekeeping and PDS Vista for payroll processing.
21.	Please confirm the renewal dates for all lines of employee benefits coverage is January 1st.
Answer	Confirmed.
22.	Please confirm if the current Aetna dedicated representative is onsite at the County.
Answer	Confirmed.
23.	Please clarify what is meant on page 19 of the RFP, #2.2.10 "Vendor shall assist with coordination of pre and post implementation audits."
Answer	Vendor shall assist the County with coordinating and completing pre and post implementation audits for all lines of coverage. This could include, but is not limited to, confirming plan design setup and claims processing.
24.	How does the County currently complete its ACA measurement & filing requirements? Which system is used?
Answer	The County uses standard measurement periods (30 days of employment, 90 days of employment, one year of employment, annually in October). PDS Vista is the system utilized.

BIDDER/PROPOSER IS ADVISED, YOU ARE REQUIRED TO ACKNOWLEDGE RECEIPT OF THIS ADDENDUM WHEN SUBMITTING A BID/PROPOSAL. FAILURE TO COMPLY WITH THIS REQUIREMENT MAY RESULT IN THE BIDDER/PROPOSER BEING CONSIDERED NON-RESPONSIVE.

ALL OTHER TERMS AND CONDITIONS OF THE SOLICITATION DOCUMENTS ARE AND SHALL REMAIN THE SAME.

[Christy VanAllen](#)

Christy VanAllen, Procurement Analyst

Direct Line: 239-533-8839

Lee County Procurement Management