

WALTON COUNTY SCHOOL BOARD

RFP 2122-04 – VOLUNTARY VISION INSURANCE

May 27, 2022

REQUEST FOR PROPOSAL
FOR VOLUNTARY VISION INSURANCE

SUBMISSIONS DUE

9:00 A.M. CST, Wednesday, June 22, 2022

VOLUNTARY VISION INSURANCE

Although every effort was made to ensure such, Walton County School Board does not vouch for the accuracy of the information provided by existing insurance companies.

INFORMATION AND REQUIREMENTS

The Walton County School Board (WCSB) is seeking proposals for the following coverages/services as further described in this Request for Proposal (RFP). All interested insurance companies licensed in the State of Florida are invited to submit proposals for providing a voluntary vision insurance plan to eligible employees and retirees.

BACKGROUND

The WCSB insures approximately 1500 employees and retirees.

SUBMISSION DUE DATE

One (1) original and eight (8) copies of proposal responses shall be submitted in a sealed package clearly marked **RFP 2122-04 – VOLUNTARY VISION INSURANCE** and delivered in person or by mail to Stephanie Hofheinz, Chief Financial Officer, 145 Park Street, Bldg. 3, DeFuniak Springs, FL 32435 by 9:00 a.m., CST, June 22, 2022.

All proposals must be date and time stamped by designated WCSB staff. Proposals will be opened in the Board Room immediately following the deadline for receipt of proposals. Any proposal received after the deadline indicated above will be date and time stamped and will not be opened. It is the proposer's responsibility to ensure that the proposal is properly received at the correct location prior to the deadline. Alterations written on the outside of a bid or proposal will not be accepted. RFPs will be publicly opened and evaluated by the Insurance Committee. The Insurance Committee will review the proposals and determine the proposal which meets specifications suitable to District needs with consideration given to terms of service and past performance of the vendor. All RFP's submitted shall become public record upon an announcement of a recommended award or thirty (30) days after the opening date, whichever occurs first.

ADDITIONAL INFORMATION

Requests for additional information must be submitted via email to Stephanie Hofheinz, Chief Financial Officer, at hofheinzs@walton.k12.fl.us.

WAIVER/REJECTION OF SUBMISSIONS

WCSB reserves the right to waive formalities or informalities in the proposals, to reject any or all submissions, to accept any submissions deemed to be in the best interests of WCSB and to negotiate or not negotiate with and/or interview or not interview any or all submitting carriers. WCSB may reject any or all proposals. WCSB does not discriminate on the basis of race, color, National origin, sex, religion, age, handicap/disability or marital status in employment or provision of service.

EX PARTE COMMUNICATION

Please note that to assure proper and fair evaluation of proposals, after proposals are received WCSB prohibits ex parte communication initiated by the proposer to any WCSB official or employee prior to the time a decision has been made.

Communication between a proposer and WCSB will be initiated by the appropriate WCSB personnel in order to obtain Information or clarification needed to develop a proper and accurate evaluation of the proposal. Ex parte communication may be grounds for disqualifying the offending submitter from consideration or award of the proposal then in evaluation or any future proposal.

PUBLIC ENTITY CRIMES

A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal on a contract to provide services to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.17 for Category Two for a period of 36 months from the date of being placed on the convicted vendor list.

ACCESS TO RECORDS AND RECORDS RETENTION

The Proposer agrees that the Board, the Federal Grantor Agency, the Comptroller General of the United States of America, and the Auditor General of the State of Florida or their duly authorized representatives shall have access to any books, documents, papers, and records of the Proposer, Contractor or subcontractor which are directly pertinent to this specific contract for the purpose of making audit, examination, excerpts, and transcriptions. All Contractors and subcontractors must retain all records pertaining to this contract for three years after the Board makes final payments and all other pending matters are closed.

CONFIDENTIAL, PROPRIETARY OR TRADE SECRET MATERIAL

The Board takes its public records responsibilities, as provided under Chapter 199, F.S. and Article I, Section 24 of the Florida Constitution, very seriously. If Respondent considers any portion of the documents, data or records submitted in response to this solicitation to be confidential, trade secret or otherwise not subject to disclosure pursuant to Chapter 199, F.S., the Florida Constitution or other authority, Respondent must also simultaneously provide the Board with a separate redacted copy of its response. This redacted copy shall contain the Board's solicitation name, number, and the name of the respondent on the cover, and shall be clearly marked "redacted copy". The redacted copy shall be provided to the Board at the same time Respondent submits its response to the solicitation and must only exclude or obliterate those exact portions which are claimed confidential, proprietary, or trade secret. Respondent shall be responsible for defending its determination that the redacted portions of its response are confidential, trade secret or otherwise not subject to disclosure. Further, Respondent shall protect, defend, and indemnify the Board for any and all claims arising from or relating to Respondent's determination that the redacted portions of its response are confidential, proprietary, trade secret or otherwise not subject to disclosure. If Respondent fails to submit a redacted copy with its response, the Board is authorized to produce the entire documents, data or records submitted by Respondent in answer to a public records request for these records.

LAWS AND REGULATIONS

Proposers will comply with all applicable Federal, State and Local laws, statutes and ordinances including, but not limited to the rules, regulations and standards of the Occupational Safety and Health Act of 1970, the Federal Contract Work Hours and Safety Standards Act, and the rules and regulations promulgated under these Acts. Proposers agree not to discriminate against any employee or applicant for employment because of race, sex, religion, color, age or national origin. All agreements as a result of

an award hereto and all extensions and modifications thereto and all questions relating to its validity, interpretation, performance or enforcement shall be governed and construed in conformance to the laws of the State of Florida.

CONFLICT OF INTEREST

Any award under this RFP is subject to the provisions of Chapter 112, F.S. All Proposers must disclose with their proposal the name of any officer, director, or agent who is also an employee of the School Board. Further, all Proposers must disclose the name of any School Board employee who owns, directly or indirectly, an interest of five percent (5%) or more in the Proposer's firm or any of its branches.

LICENSES AND PERMITS

The Proposer shall obtain and pay for all necessary licenses, permits, and related documents required to comply with the RFP specifications. The Proposer shall save and hold harmless the Board as a result of any infraction of the aforementioned.

E-VERIFY

- A. Pursuant to Fla. Stat. § 448.095, Contractor shall use the U.S. Department of Homeland Security's E-Verify system, <https://e-verify.uscis.gov/emp>, to verify the employment eligibility of all employees hired on or after January 1, 2021 during the term of this Agreement.
- B. Subcontractors
 - i. Contractor shall also require all subcontractors performing work under this Agreement to use the E-Verify system for any employees they may hire during the term of this Agreement.
 - ii. Subcontractors shall provide Contractor with an affidavit stating the subcontractor does not employ, contract with, or subcontract with an unauthorized alien, as defined by Fla. Stat. § 448.095.
 - iii. Contractor shall provide a copy of such affidavit to the School Board upon receipt and shall maintain a copy for the duration of the Agreement.
- C. Contractor must provide evidence of compliance with Fla. Stat. § 448.095. Evidence may consist of, but is not limited to, providing notice of Contractor's E-Verify number.
- D. Failure to comply with this provision is a material breach of the Agreement, and School Board may choose to terminate the Agreement at its sole discretion. Contractor may be liable for all costs associated with School Board securing the same services, inclusive, but not limited to, higher costs for the same services and rebidding costs (if necessary).

PROPOSAL PREPARATION COSTS

Neither the School Board nor its representatives shall be liable for any expenses incurred in connection with the preparation of a response to this RFP.

RFP SUBMISSION REVIEW

Review of responses to this RFP will be conducted by WCSB on June 22, 2022 immediately following the 9:00 a.m. CST submission deadline in the School Board Meeting Room at 145 Park Street, DeFuniak Springs, FL 32435.

TERMS OF AGREEMENT

All subsequent agreements as a result of an award hereunder, shall incorporate all terms, conditions and specifications contained herein, and in response hereto, unless mutually amended in writing.

NARRATIVE: VOLUNTARY VISION INSURANCE

WCSB is accepting proposals from companies that are capable of providing competitive pricing, administrative services, superior quality of care management and overall exceptional value.

The current WCSB voluntary vision insurance plan is through Avesis. Employees and retirees have the option to choose either the Base Plan or Buy-Up Plan. Both plans offer four (4) benefit tier options: Employee Only, Employee + Spouse, Employee + Child(ren) and Employee + Family.

Benefit Summaries are attached that further outline the details of the current plans. Prospective companies are encouraged to offer similar plan designs.

The successful proposer will agree to offer a program in compliance with all known laws and regulations.

WCSB requests 4-tier rates (Employee, Employee + Spouse, Employee + Child(ren) and Employee + Family) for both active employees and retirees.

The successful proposer will agree to offer a program in compliance with all known laws and regulations.

CONTRACT SPECIFICATIONS AND REQUIREMENTS

CONTRACT DURATION

The anniversary date is currently set at October 1st of each year. The minimum duration for rate guarantees for the voluntary vision insurance plan is one (1) year.

NOTICE REQUIREMENTS

WCSB may cancel these contracts off-cycle with a 30-day written notice. Contracted companies will agree to provide WCSB with renewal rates by June 1st for the following contract year.

EMPLOYEE ELIGIBILITY

Employees are currently eligible for vision insurance on the 1st of the month following 60 days of their date of hire. This includes all full-time employees. WCSB would like to receive proposals allowing employees to be eligible for vision insurance on the 1st of the month following 30 days of their date of hire.

Retirees may elect to continue participation in the vision insurance program.

ACTIVELY AT WORK WAIVER

All full-time employees (as deemed by WCSB) will be eligible for vision insurance coverage.

ADMINISTRATION

CUSTOMER SERVICE

Provide support to District staff for any claims or billing issues requiring intervention on behalf of the employee/retiree.

- Monitor and process all claims as needed and communicate to District personnel.
- Support District staff in the servicing of day-to-day administrative issues to include providing assistance in the daily administration of programs, resolution of vendor and carrier service

- issues and address questions and concerns raised by Board employees and management.
- Provide a qualified contact person for District personnel to contact directly to assist with claims issues and other insurance related questions.
 - Assist the Board in preparation of defense if any litigation should result from benefits contracting and testify in court if needed.

MATERIALS AND IMPLEMENTATION

Companies awarded the contract are expected to build in the costs for implementation and on-going materials and customer support.

ELECTRONIC SUBMISSION OF ENROLLMENT

The successful proposer(s) will agree to accept electronic submission of enrollment from the benefit administration system.

OPEN ENROLLMENT

- Attend onsite open enrollment meetings to provide information and assistance to employees and retirees as needed or requested.

BILLING AND ONGOING ENROLLMENT

- Provide designated District personnel reconciliation assistance for vision insurance plans as needed.

TERMS AND CONDITIONS OF PROPOSAL

- Rate proposed must be final based on the census and information submitted.
- Please provide proposals for aforementioned 4-tier structure for plans similar to the current Base Plan and Buy-Up Plan.
- Rates proposed will be guaranteed until September 30, 2023 and not adjusted based on participants added during open enrollment.
- Proposals must be valid through the effective date of the contract.
- Proposals must be signed by an official authorized to bind the proposal to the subsequent agreement, if any.
- Proposals must indicate underwriting assumptions, enrollment requirements and any terms and conditions associated with the prospective contract.
- Proposals must indicate any exceptions or deviations from the RFP specifications. All deviations must be clearly identified separately, and all exceptions must include a written explanation as to the scope of the exception, any ramifications to the WCSB and any advantages/disadvantages to the WCSB as a result of the exception.
- Each proposing company's program must comply with all applicable Florida and U.S. laws.

WCSB is under no obligation to award this contract to the firm whose proposal offers the lowest rates. Contract awards will be based on cost and service reputation/capability. WCSB reserves the right to negotiate further terms and conditions, including rates, with the highest ranked proposer. If an agreement cannot be reached with the highest ranked proposer, WCSB reserves the right to enter into negotiations with the next highest ranked proposer and continue the process until an agreement is reached or reject all proposals if a satisfactory agreement cannot be reached. WCSB may award an agreement based on initial proposals without further discussion or negotiation if deemed in the best interest of WCSB as determined by the Insurance Committee during the evaluation process.

EVALUATION CRITERIA

The proposal received will be reviewed by the Insurance Committee. The selection will be

based upon the criteria below. The Insurance Committee may conduct simultaneous negotiations with vendors regarding qualifications, quality, price and plan alternatives, prior to making a recommendation to the WCSB. The contract will be awarded to the responsible firm whose proposal is most advantageous to WCSB based on the Evaluation Criteria detailed below. Any negotiations will be in accordance with 286.0113, Florida Statutes.

	CRITERION
1	<u>Cost</u> Although cost will be a major consideration in evaluation proposals, it will not be the only consideration. Cost will include disclosure of rates/premiums, services/administration costs, any cost guarantees (if applicable) and all other cost components.
2	<u>Coverage/Plan Design</u> The ability to administer benefits as is or to exceed current coverage options to include the amounts and breadth of coverage, extent of deductibles, co-payments, coinsurance, restrictions, or exclusions.
3	<u>Provider Network</u> The number and types of providers, including but not limited to: <ul style="list-style-type: none"> • The number of vision providers in the proposed network • The number of vision providers in the network who will accept new patients • The number of vision providers in Walton County, Florida
4	<u>Service Reputation/Capability</u> The service reputation and administration capabilities of proposers. This includes such items as enrollment assistance, service responsiveness, and communication with WCSB Staff on program administration, quality of billings, and online access and support.

Adherence to Specifications	5%
Cost & Coverage/Plan Design	50%
Provider Network	35%
Service Reputation/Capability	10%
Total:	100%

PROPOSER RULES FOR WITHDRAWAL

Proposals may be modified or withdrawn by an appropriate document duly executed (in the manner that a proposal must be executed) and delivered to the place where proposals are to be submitted at any time prior to the opening of the proposals.

IRREVOCABILITY OF PROPOSAL

Each Proposer agrees that proposals shall remain open until the effective date of coverage, October 1, 2022, not be subject to revocation, and shall be subject to the School Board's acceptance.

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I/We certify that I/we have carefully read all instruction pertaining to this Request for Proposal and that my/our bid proposal complies, without exception, with all instructions and specifications.

Company Name

Authorized Representative

Printed Name

Title

Address

City State Zip Code

Contact Numbers:

Business Number: (_____)_____

Cell Number: (_____)_____

Fax Number: (_____)_____