

LAKELAND AREA MASS TRANSIT DISTRICT (LAMTD)

Office of Purchasing and Contracts
1212 George Jenkins Blvd., Lakeland Florida 33815

AMENDMENT OF SOLICITATION

1. SOLICITATION No. 19-004	2. AMENDMENT No. 1	3. EFFECTIVE DATE: 02/15/19
4. ISSUED BY: Lisa Harris, Contracts Specialist Direct Dial: (863) 327-1314 Email: LHarris@ridecitrus.com		5. NUMBER OF PAGES: 3
6. REVISED SUBMISSION DUE DATE AND TIME: The submission due date and time is changed as follows: DATE AND TIME: No Change		
7. AMENDMENT OF SOLICITATION: The solicitation identified in Block 1, is hereby amended as described in Block 10. Except as provided herein, all other provisions of the solicitation, as hereto amended, shall remain unchanged and in full force and effect.		
8. REQUIREMENT TO ACKNOWLEDGE AMENDMENT: Failure of an offeror to acknowledge receipt of this amendment may result in offer rejection. Offeror must acknowledge receipt of this amendment prior to the deadline specified in the solicitation for receipt of offers and by one of the following methods: A. By signing Block 9 and returning this amendment to the District with your Proposal; B. By separate letter or e-mail which includes a reference to this solicitation and amendment numbers.		
9. OFFEROR'S ACKNOWLEDGEMENT OF AMENDEMENT: Name & Title: _____ Signature: _____ Offeror: _____ Date: ____/____/____		
10. DESCRIPTION OF AMENDMENT: The following modifications are hereby made to the solicitation document: A. As indicated in Block 6 above, the Offer Submission Due Date and Time has not changed: B. Replace the Solicitation Number 18-004, referenced in the "Sealed Proposal Label" with 19-004. C. All changes to the solicitation are referenced in paragraph A and B. D. Attached to this amendment are Questions and Clarification. Responses to questions are provided as a courtesy and do not "modify" the solicitation. <p style="text-align: center;">[END]</p>		

**RFP 19-004 Insurance Agent/Broker Services for
the District's Employee Health & Welfare Insurance Benefit Suites**
Questions and Clarifications

February 13, 2019

1. **Question:** Is the evaluation process based solely on points?

Response: As outlined in the RFP section 5.10 & 5.12, firms will be evaluated on a point scale, short listed, then brought in for oral presentation. The final selection will be based on all of the factors stated.

2. **Question:** Section 2 appear to be too simplistic and based on standard practices, such as A) the question about accepting fiduciary liability (#28), all brokers accept this, why would it even be questioned? B) Same thing with the multi-line discount question (#24), all carriers provide this discount

Response: What may seem like standard practice by one firm, is not always the case for another. Please provide the details your firms deem fit. The question is simply presented as a means of acquiring detailed information, about a firm, as part of the technical review process.

3. **Question:** Will questions received, prior to the pre-bid conference, be answered during the conference?

Response: Yes, we try to answer all questions received during the conference. Those question are then incorporated into the Addendum that follows, which recaps the Q&A portion of the meeting.

4. **Question:** Does the District have a preferred method of broker compensation (fee based or percentage of premiums)?

Response: As per Section 1.7 and 2.7, the contract shall be an all-inclusive firm, fixed fee agreement for the services outlined in Section 2 of the solicitation.

5. **Question:** Will worksite (Aflac) coverage be managed by the awarded brokerage or by an outside agent?

Response: The coverage is currently managed by an Aflac Representative.

6. **Question:** Can a performance guarantee involving compensation also include increased compensation if established metrics are met/exceeded?

Response: Section 2 of the solicitation outlines the minimum requirements associated with the District all-inclusive firm, fixed fee agreement. Services exceeding those requirements may be compensated as "Optional Items/Services". Said services may be presented as a fixed fee outlining its correlation to labor hours or offered at an hourly labor rate all together.

7. **Question:** From question (23), please explain and clarify. In addition to an "A" rating would you like an actual carrier reserve amount?

Response: Please provide the details your firms deem fit. The question is simply presented as a means of acquiring detailed information about a firm, as part of the technical review process

8. **Question:** From question (25), please explain and clarify. Are you asking for the typical carrier reinsurance or pooling points?

Response: The District is simply seeking an explanation at to the plan available by the Offeror, if any. Please provide the details your firms deem fit. The question is simply presented as a means of acquiring detailed information, about a firm, as part of the technical review process

**RFP 19-004 Insurance Agent/Broker Services for
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- 9. Question:** From question (28), please explain and clarify. As a brokerage, not offering financial products or guidance, there is typically no fiduciary liability to take on. Can you give an example where a fiduciary liability would apply?

Response: Please provide the details your firms deem fit. The question is simply presented as a means of acquiring detailed information, about a firm, as part of the technical review process

Example: Employee Termination of employment. The District's COBRA processing utilizes notification to broker who in turn notifies the vendor to issue Federally mandated COBRA notice. Failure to notify by the broker would be an example of Fiduciary responsibility

- 10. Question:** From question (31), please explain and clarify. Are you asking for the typical carrier administrative fees?

Response: Please provide the details your firms deem fit. The question is simply presented as a means of acquiring detailed information, about a firm, as part of the technical review process.

- 11. Question:** Could you tell me how many employees participate in the Lakeland Area Mass Transit District's health plan?

Response: As per Section 2.4A, the District has 181 full time employees. Those employees are covered by the described benefit plan with the covered population consisting of 159 medical, 161 dental, and 129 vision.