



PURCHASING – BIDS AND CONTRACTS
REQUEST FOR PROPOSAL
For Insurance Broker Agency Services for
Oklahoma Higher Education Employees Insurance Group (OKHEEI)
RFP 2022-105

DIRECT ALL QUESTIONS & INQUIRES TO:

Primary Contact
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No phone calls shall be accepted during the solicitation posting. Email or Fax communications are the only acceptable forms of communication and shall be posed during the designated and acceptable time frame according to the RFP directive.

ADDENDUM #1: Date: March 22, 2022

Please note the additions, deletions, and/or clarifications to the above referenced RFP No. 2022-105 below. This addendum and any previous addendums form a part of the Contract documents and modify the original RFP documents, dated 3/14/2022.

ONE SIGNED COPY OF THIS ADDENDUM MUST BE INCLUDED WITH YOUR PROPOSAL AND RECEIVED ON OR BEFORE THE RFP DUE DATE/TIME.

CLARIFICATIONS:

2.3 Schedule of events:

- 1.** 4/01/2022, 3:00 pm CDT - Last date for vendors to submit written questions.
- 2.** 4/05/2022, 3:00 pm CDT - Last date for addendums to be posted.
- 3.** 4/15/2022, 3:00 pm CDT - RFP Closing Date and time.
- 4.** 4/20/2022, 3:00 pm CDT - Evaluation period ends
- 5.** 4/21/2022, 5:00 pm CDT - Finalists are invited (by email) to make a presentation.
- 6.** 4/26/2022, TBD - Vendor presentations (location to be determined).
- 7.** 5/09/2022 - Tentative Notice of Award.

4.0 Overview:

The participating institutions and the number of employees covered under the current plan are:

OKHEEI / RUSO Allocation - Jan 2022				
	Active	Pre 65Retirees	Jan 2022	% of Total
East Central University	374	42	416	12.44%
Murray State College	136	7	143	4.28%
Northeastern State University	767	48	815	24.37%
Northern Oklahoma College	240	4	244	7.30%
Northwestern Oklahoma State College	228	14	242	7.24%
Redlands Community College	98	2	100	2.99%
Rose State College	304	22	326	9.75%
Seminole State College	118	15	133	3.98%
Southeastern Oklahoma State University	414	25	439	13.13%
Southwestern Oklahoma State University	450	36	486	14.53%
	3129	215	3344	100.00%
* RUSO is included with SWOSU				

Questions received:

Q1. Are Attachments A-E required with the submission?

a. If so, where should they be included in the proposal?

A1. Yes, attachments A-E are required with submission.

A1(a) The attachments can be included at the end of the vendor's submission.

Q2. Is a Cost Proposal to address items 6.1-6.4 requested at this time?

a. If so, where should it be included in the proposal or should it be bound separately?

A2. Yes, the cost proposal items 6.1-6.4 is requested at the time of RFP submittal.

A2(a) The cost proposal should be included before Attachment A.

Q3. It's widely known through the benefits consulting industry in Oklahoma that NFP has taken a severe loss on the RUSO schools consulting account. They only charge \$150,000 annually and have five team members working on the account constantly. With that said, what is the expectation in regards to the consulting fee that the RUSO schools expect to spend on a consultant that is asked to perform the varying degrees of duties that you outlined in this RFP?

A3. The contract for services is with the OKHEEI Group, not the RUSO Board. I am attaching more information about the OKHEEI group. The OKHEEI board does not have expectations in regard to the consulting fee; that is the reason for this RFP process. The OKHEEI Board will review the RFP submissions and determine which vendor may provide the best services for the group. Here is additional information about OKHEEI:

The Oklahoma Higher Education Employee Interlocal Group (OKHEEI) was established in 2009 to more effectively and economically secure employee benefits for the employees of state colleges, universities, governing board administrative offices of the colleges and universities, and auxiliary institutions who are members of the OKHEEI Group. An amended Interlocal Agreement for the OKHEEI Group was approved by the Office of Attorney General for the State of Oklahoma on November 7, 2019.

Members of the OKHEEI group are currently:

1. East Central University (ECU)
2. Northeastern State University (NSU)
3. Northwestern Oklahoma State University (NWOSU)
4. Southeastern Oklahoma State University (SE)
5. Southwestern Oklahoma State University (SWOSU)
6. Regional University System of Oklahoma (RUSO)
7. Northern Oklahoma College (NOC)
8. Murray State College (MSC)
9. Seminole State College (SSC)
10. Rose State College (RSC)
11. Redlands Community College (RCC)

Effective January, 2017, the group changed to self-insured health care coverage and currently insures approximately 3,344 employees. The monthly health premium rates are determined before the beginning of each year and each institution listed above deposits their employee's monthly health care total premiums into an OKHEEI trust fund.

The powers of the OKHEEI group are vested in its Board of Trustees. Each institutional member has one board member and one vote.