



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:

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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 #2: Date: April 5, 2022, 3:00pm

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.

Questions and Answers:

Q(1) Are audited financial statements and actuarial reports for the OKHEEI plan required pursuant to 36 O.S. 607.1? If so, does the scope of services include the preparation of the required actuarial report?

A(1) Yes, audited financials and actuarial reports are required. No, preparation of the required actuarial report should not be included in the scope of services for this RFP; USI Consulting is currently preparing the actuarial reports.

Q(2) Will the most current audit report be provided as an addendum to this RFP?

A(2) The 2019 audited financials are attached.

Q(3) Does the scope of services require the calculation of GASB 43/45 liabilities related to OPEB?

A(3) No, the OKHEEI Board members will issue a contract with a company to provide this service.

Q(4) Does the scope of services contemplate the calculation of the fiscal impact of potential legislation that could affect the plan?

A(4) Yes, the OKHEEI Board members would expect the selected broker to provide information that would affect the organization.

Q(5) Does the number of participants listed in the RFP in section 4.0 Overview include retirees?

A(5) The number of participants listed on page 2 of the addended RFP (3,334) includes the pre-65 retirees; the post-65 retirees are not included in this number. However, the broker is expected to help OKHEEI place the contract for post 65 supplemental coverage, which is currently with United Health Care (UHC); the vision and dental plans are also available to the post-65 retirees. There are approximately 1,800 post-65 retirees in the UHC Supplemental plan.

Q(6) The RFP refers to the medical/Rx plan. If awarded, will the succeeding firm be involved in due diligence, placement, management, etc. of the ancillary programs? Example: Group Life/AD&D, supplemental life, vision, etc.? If so, is the current benefit consulting firm receiving commissions on those products?

A(6) Yes, the successful firm will be involved in due diligence, placement, management etc. of the ancillary programs. The OKHEEI Board members are not aware of commissions the current broker receives but it would be a requirement of the successful firm for this RFP to inform the OKHEEI board members of any commissions that are, or may be, received for those products.

Q(7) Section 5.1 of the RFP refers to Evaluation criteria. Of the ten criteria listed, do you know what percentage/weighting each of the listed criteria include?

A(7) The OKHEEI Board members have not set a percentage/weighting off each of the listed criteria; each criteria will have equal weight.