



St. Johns River Water Management District

Ann B. Shortelle, Ph.D., Executive Director

4049 Reid Street • P.O. Box 1429 • Palatka, FL 32178-1429 • 386-329-4500 • www.sjrwmd.com

May 17, 2021

Interested Firms

Re: Quote Request, 36790 – Employee Benefit Technical and Analytical Services

The St. Johns River Water Management District (District) desires to retain an employee benefits consultant with the requisite skills, experience, and resources to provide technical advice and analytical services in support in the administration of the employee benefits program.

If you are interested in this project, email your quote in PDF format along with the Excel attachment, 'QR 36790 Benefit Technical Advisor' **after 8:00 a.m. and before 4:00 p.m. on June 17, 2021**. You must enter your responses to the questions in the Excel spreadsheet and include it as an attachment with your quote. Do not email the quote or Excel attachment prior to or after the above-stated timeframe. It is required that all quotes be submitted by email addressed to the District's Contract Specialist, Leslie Fancella at lfancella@sjrwmd.com.

If you need assistance or have any questions about submitting your quote, please email the Contract Specialist, Leslie Fancella at lfancella@sjrwmd.com. Between the release of this quote request and the posting of the notice of intended decision, Respondents to this quote request or persons acting on their behalf may not contact any employee or officer of the District concerning any aspect of this solicitation, except the procurement employee listed above. Violation of this provision is grounds for rejecting a response.

Respondent's quote will consist of two sections as follows:

Section A — Respondent's answers to the questions and requests for information to show its capability to meet the District's technical requirements as provided in Exhibit 1, the Statement of Work. Failure to answer and respond to each question or information request may result in Respondent's quote being rejected as non-responsive. Responses must be submitted on the Excel spreadsheet "Benefit Advisor Questionnaire".

Section B — Respondent's pricing.

This will be an annual contract. The District reserves the right to renew the agreement(s) for two additional 12-month terms beginning October 1, 2022. The estimated annual expenditure under this contract action is not to exceed \$50,000.

The District's Evaluation Committee will meet at District headquarters at 4049 Reid Street, Palatka, Florida 32177-2571, to discuss the responses. The meeting will be held at **10:00 a.m. on June 22, 2021**. Staff anticipates executing a contract by October 1, 2021.

This letter is forwarded to you as an offer to provide a quotation based on the information and requirements provided herein, including the technical requirements stated in the attached Exhibit 1 – Statement of Work (SOW). Insurance requirements are provided in Exhibit 2.

The quotation shall include all costs associated with the services to be provided [offering technical advice and analytical services in supporting the administration of employee benefits program (e.g., health, dental, disability, and life insurance)], including insurance, and other related costs for the services described in the SOW).

The District is a political subdivision of the state of Florida, whose boundaries cover all or portions of 18 counties, and is tax exempt (Tax ID No. 85-8012643710C-3; expires March 31, 2023). Respondent shall provide an estimate of all applicable taxes and fees in its quote, including a list of taxes and fees that fall under the District's exemption.

1. Opening of Quotes

- a. The Florida Public Records Act, §119.071(1)(b), Fla. Stat., exempts sealed quotes from inspection and copying until such time as the District provides notice of an intended decision pursuant to §120.57(3)(a), Fla. Stat., or until 30 days after opening of quotes, whichever is earlier. This exemption is not waived by the public opening of quotes.
- b. Unless otherwise exempt, Respondent's quote is a public record that is subject to disclosure upon expiration of the above exemption. If any information submitted with the Quote is a trade secret as defined in §812.081, Fla. Stat., and exempt from disclosure pursuant to §815.04, Fla. Stat., Respondent must clearly identify any such material as "CONFIDENTIAL TRADE SECRET" in its submittal and explain the basis for such exemption. The District reserves the right, in its sole judgment and discretion, to reject a submittal for excessive or unwarranted assertion of trade secret confidentiality and return the submittal to Respondent.
- c. Respondents shall bear all costs associated with preparing and submitting responses to this Quote Request, and the subsequent evaluation phase. The District will, in no way, be responsible for these costs, regardless of the conduct or outcome of the qualification process.

2. Inquiries and Addenda

- a. District staff are not authorized to orally interpret the meaning of the Quote Request package, or correct any apparent ambiguity, inconsistency, or error therein. In order to be binding upon the District, the interpretation or correction must be given by the Procurement Specialist and must be in writing. The Procurement Specialist may orally explain the District's procedures and assist Respondents in referring to any applicable provision in the Quote Request documents, but the Respondent is ultimately responsible for submitting the quote in the appropriate form and in accordance with written procedures.
 1. Every request for a written interpretation or correction must be received at least nine days prior to opening of quotes in order to be considered. Requests must be submitted by email to the Contract Specialist at lfancella@sjrwmd.com. Interpretations, corrections, and supplemental instructions will be communicated by written addenda to this solicitation posted by Onvia DemandStar to all prospective Respondents (at the respective addresses furnished for such purposes) not later than five days prior to the date fixed for the Quote Request opening.
 2. Submission of a quote constitutes acknowledgment of receipt of all addenda. Quotes will be construed as though all addenda had been received. Failure of the Respondent to receive any addenda does not relieve Respondent from any and all obligations under the quote, as submitted. All addenda become part of the Agreement.

3. Evaluation and Award Procedures

- a. The quotes will be evaluated by a staff Evaluation Committee based upon the criteria and weighting set forth in "Evaluation Criteria." The committee members will meet at District headquarters or other location as appropriate to discuss the quotes and their individual evaluations. Each committee member completes an evaluation form, from which the overall ranking of quotes is

compiled. Evaluation forms may be submitted at or subsequent to the Evaluation Committee meeting.

- b. Section 286.0113, Fla. Stat., exempts from being open to the public, any portion of a meeting at which: (1) a negotiation with a Respondent is conducted pursuant to a competitive solicitation; (2) a Respondent makes an oral presentation as part of a competitive solicitation; (3) a Respondent answers questions as part of a competitive solicitation; or (4) negotiation strategies are discussed. Also, recordings of, and any records presented at, the exempt meeting are exempt from §119.07(1) and §24(a), Art. I of the State Constitution (Public Records) until such time as the District provides notice of an intended decision or until 30 days after opening the Quotes or final replies, whichever occurs earlier. A complete recording shall be made of any portion of an exempt meeting. No portion of the exempt meeting may be held off the record.
- c. Pursuant to §286.0113 Fla. Stat., if the District rejects all quotes and concurrently provides notice of its intent to reissue the competitive solicitation, the recording and any records presented at any exempt meeting shall remain exempt from §119.07(1) and §24(a), Art. I of the State Constitution (Public Records) until such time as the District provides notice of an intended decision concerning the reissued competitive solicitation or until the District withdraws the reissued competitive solicitation. A recording and any records presented at an exempt meeting are not exempt for longer than 12 months after the initial District notice rejecting all quotes.
- d. The District will examine the quotes to determine completeness. Obvious mismatches with regard to technical or commercial requirements will be rejected at this time.
- e. The Committee will meet to evaluate and rank the quotes in the location(s), time(s) and date(s), stated at the beginning of this Quote Request package.
- f. Following the evaluation process, contract negotiations will commence with the Respondent submitting the highest-ranked quote. If negotiations fail with the highest-ranked Respondent, negotiations will proceed with the next highest-ranked Respondent, and so forth.
- g. The Agreement will be awarded to the Respondent having the highest ranked quote, which successfully concludes negotiations with the District (the “Successful Respondent” or “Provider”). The Agreement may be modified based on the District’s acceptance of any alternatives listed in the quote that the District deems in its best interest.
- h. If two or more quotes are equal in all respects, the Agreement will be awarded as follows: (1) to the Respondent that certifies compliance with §287.087, Fla. Stat., via the Drug-Free Workplace Form; or (2) by lot.
- i. In the event the Successful Respondent(s) fail to enter into the Agreement or the Agreement with said Respondent is terminated within 90 days of the effective date, the District reserves the right to negotiate with the other respondents in ranked order, if available, and award an Agreement.
- j. All Respondents will be notified of the District's intent to award or decision to award the Agreement. For the purpose of filing a protest under §120.57(3), Fla. Stat., the time period will commence as provided in “Notices and Services Thereof.”

4. Disqualification of Respondents

Any of the following causes will be considered as sufficient grounds for disqualification of a Respondent and rejection of the Quote:

- a. Contacting a District employee or officer other than Leslie Fancella, the Contract Specialist assigned to this solicitation action, about any aspect of this Quote Request before the notice of intended decision is posted.
- b. Submission of more than one quote response for the same subject matter by an individual, firm, partnership, or corporation under the same or different names;
- c. Evidence of collusion among Respondents;
- d. Submission of materially false information with the Quote;

- e. Information gained through checking of references or other sources which indicates that Respondent may not successfully perform the Work;
- f. Respondent is failing to adequately perform on any existing contract with the District;
- g. Respondent has defaulted on a previous contract with the District;
- h. The evidence submitted by Respondent, or the District's investigation of Respondent, fails to satisfy the District that Respondent is properly qualified to carry out the obligations of the Agreement in a manner acceptable to the District and within the time period specified;
- i. Any other cause that is sufficient to raise doubt regarding the ability of a Respondent to perform the Work in a manner that meets the District's objectives for the Work.

5. Rejection of Quote

- a. Quotes must be emailed to the Contract Specialist, Leslie Fancella, at lfancella@sjrwmd.com, and received during the time specified on page 1 in order to be considered timely. Untimely quotes will not be considered. Quotes will be considered irregular and may be rejected if they show material omissions, alterations of form, additions not called for, conditions, limitations, unauthorized alternate quotes, or other material irregularities. The District may consider incomplete any quote not prepared and submitted in accordance with the provisions specified herein, and reserves the right to waive any minor deviations or irregularities in an otherwise valid Quote.
- b. The District also reserves the right to reject any and all quotes when it determines, in its sole judgment and discretion that, it is not in its best interest to award the agreement.

6. Diversity

The District is committed to the opportunity for diversity in the award and performance of all procurement activities. The District encourages its primary respondents to make a good faith effort to ensure that women and minority-owned business enterprises (W/MBE) are given the opportunity for maximum participation as second and lower tier participants. The District will assist Respondents by sharing information on W/MBEs to encourage their participation.

7. Public Entity Crimes/Discriminatory Vendors

In accordance with §287.133 and §287.134, Fla. Stat., a person or affiliate who has been placed on the convicted or discriminatory vendor lists following a conviction for a public entity crime or placement on the discriminatory vendor list may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or Contractor under a contract with any public entity; and may not transact business with any public entity in excess of the threshold amount provided in §287.017 for CATEGORY TWO (\$35,000) for a period of 36 months following the date of being placed on the convicted or discriminatory vendor lists.

8. Notices and Services Thereof

- a. The District will publish notice of specifications and criteria, including addenda, intended agency decisions, or other matters pertinent to this solicitation on Onvia DemandStar at *DemandStar.com*. Onvia DemandStar may also be accessed through the District's website at *sjrwmd.com*. In addition, the District will post notices of intended agency decisions at the District's headquarters, 4049 Reid Street, Palatka, Florida, Administration Building, Procurement Bulletin Board, on the date the publication is posted on Onvia DemandStar.

- b. Notices that are posted on Onvia DemandStar are deemed received at 8:00 a.m. on the next business day following the date posted. Notices that are posted at the District's Procurement Bulletin Board are deemed received at 8:00 a.m. on the next business day following the date of posting. Notices will be posted for a minimum of 72 hours following the time at which they are deemed received. The time period for filing a Notice of Protest pursuant to §120.57(3), Fla. Stat., and Rule 28-110.003, Fla. Admin. Code, commences at the time notices are deemed received.
- c. As a courtesy to Respondents, the District may send copies of the notices of intended agency decisions via email or facsimile to the address or phone number provided by Respondent. These courtesy communications neither constitute official notice nor vary the times of receipt set forth above.

9. Protest Procedures

- a. Pursuant to §120.57(3), Fla. Stat., and Rule 28-110.003, Fla. Admin. Code, any person adversely affected by the procurement methodology described herein, or the specifications or criteria, including addenda, must file a Notice of Protest within 72 hours after receipt of the solicitation documents or addenda.
- b. Pursuant to §120.57(3), Fla. Stat., and Rule 28-110.003, Fla. Admin. Code, any person adversely affected by a District decision or intended decision to award a contract, or to reject all bids, proposals, or qualifications, must file a Notice of Protest within 72 hours after receipt of the decision or intended decision. Pursuant to §120.57(3), Fla. Stat., and Rule 28-110.004, Fla. Admin. Code, the protester must also file with the District Clerk a Formal Written Protest within ten days after the date the Notice of Protest is filed with the District. The Formal Written Protest must state with particularity the facts and law upon which the protest is based. Pursuant to §287.042(2)(c), Fla. Stat., any person who files an action protesting the decision or intended decision must post with the District Clerk at the time of filing the formal written protest a bond, cashier's check, or money order made payable to the St. Johns River Water Management District in an amount equal to one percent (1%) of the estimated contract amount.
- c. No additional time will be added for mailing. All filings must comply with Rule 28-106.104, Fla. Admin. Code, and must be addressed to and received by the District Clerk at the District Headquarters in Palatka, Florida within the prescribed time periods. The District will not accept as filed any electronically transmitted facsimile pleadings, petitions, Notice of Protest or other documents. Failure to file a protest within the time prescribed in §120.57(3), Fla. Stat., or failure to post the bond or other security required by law within the time allowed for filing a bond will constitute a waiver of proceedings under chapter 120, Fla. Stat. Mediation under §120.573, Fla. Stat., is not available.

RESPONSES

The District invites interested parties that meet the minimum qualifications contained herein to submit quotes regarding their products and related service offerings.

SECTION A — RESPONDENT'S ANSWERS TO QUESTIONS AND REQUESTS FOR INFORMATION

1. **A letter of transmittal** — this letter should not exceed one page in length and should briefly state Respondent's understanding of the work, its responsibilities, and be signed by an individual authorized to bind the proposing firm.
2. Proof of Respondent's ability to do business in the state of Florida (copy of Certificate as to Corporation).

3. Complete the forms provided by the District:
 - (a) Affidavit as to Non-Collusion and Certification of Material Conformance with Specifications
 - (b) Qualifications Form – Benefit Technical Advisor Questionnaire (Excel Spreadsheet)
 - (c) Drug Free Workplace Form – required only in the event of a tie

4. **Minimum Respondent Qualification Requirements:** Respondent must provide a complete response to each of the following questions or requests for information with their quote (failure to provide responses may result in the quote being considered non-responsive)
 - a. Respondent (or a combination of the firm, individual, or account manager assigned to the District’s account), must have provided employee benefit advisory services to at least five clients (public or private clients) during the past five years. Each of the five clients (during the term of the engagement) must have had at least:
 - i. One physical (“brick and mortar”) work location in Florida staffed by benefit-eligible employees; and
 - ii. Four hundred benefit-eligible employees (total of all work locations)
 - iii. The annual value of the services provided to each client must have exceeded \$30,000 annually.
[See District-provided form — Benefit Technical Advisor Questionnaire (Excel Spreadsheet)]

 - b. Respondent (or a combination of the firm, individual, or account manager assigned to the District’s account), must have no less than seven years of experience on employee benefit services of the nature specified under subparagraph “a” above within the ten years immediately prior to the time and date set for the receipt of responses.
[See District-provided form — Benefit Technical Advisor Questionnaire (Excel Spreadsheet)]

 - c. Respondent (or a combination of the firm, individual, or account manager assigned to the District’s account), must possess the capability to perform “in-house” actuarial analysis of benefit plan claims, funding models, and plan design — describe types of analyses and provide a list the personnel responsible for production.
[See District-provided form — Benefit Technical Advisor Questionnaire (Excel Spreadsheet)]

 - d. Respondent (or a combination of the firm, individual, or account manager assigned to the District’s account), must have assisted (provided advisory services) at least one state of Florida public-sector client (i.e., special district, local government) in successfully obtaining approval of its self-funded employee benefit plan by the Office of Insurance Regulation pursuant to §112.08, Fla. Stat.
[See District-provided form — Benefit Technical Advisor Questionnaire (Excel Spreadsheet)]

 - e. Respondent (or a combination of the firm, individual, or account manager assigned to the District’s account), must possess a current state of Florida insurance broker’s license as of the time and date set for the receipt of responses (provide copy of license).
[See District-provided form — Benefit Technical Advisor Questionnaire (Excel Spreadsheet)]
(Respondent-provided information — copy of broker’s license)

 - f. Respondent (or a combination of the firm, individual, or account manager assigned to the District’s account), must possess applicable industry certifications to work on accounts of this type (provide copy of certifications).
[See District-provided form — Benefit Technical Advisor Questionnaire (Excel Spreadsheet)]
(Respondent-provided information — copy of certifications)

SECTION B — PRICING CONSIDERATIONS

I. Cost/Rate Schedule

<u>Item</u>	<u>Total Cost</u>
Annual Flat Fee	\$ _____

Respondent’s quote shall be in the form of an annual flat-fee to perform the Work detailed in the attached Statement of Work. The Successful Respondent also is responsible to submit an invoice to the District on a quarterly basis for 25% of the annual fee.

a. Contractor is responsible to provide the following services (details for each item are provided in the attached statement of work)

1. Benefit Guidance
2. Benefit Cost Strategies, Budgeting and Analysis Support – Health and Dental Insurance
3. Benefit Plan Procurement Support – Health and Dental Plans
4. Annual Work Plan and Quarterly Reporting – Health and Dental Plans
5. Vendor Relations – Health and Dental Plans

EXHIBIT 1 — STATEMENT OF WORK

1. **PURPOSE AND BACKGROUND**

The St. Johns River Water Management District (District) is an environmental regulatory agency of the state of Florida whose work is focused on ensuring a long-term supply of drinking water, and to protect and restore the health of water bodies in the district's 18 counties in northeast and east-central Florida. The District has 531 positions assigned to its headquarters, three service centers and multiple field stations. The St. Johns River Water Management District currently offers its employees the following fully insured benefits:

- Health insurance
- Dental insurance
- Life and accidental death and dismemberment insurance
- Long term disability insurance

There are currently approximately 415 members enrolled in the medical plan and 430 members enrolled in the dental plan. There are approximately 33 retirees and dependents on the medical plan and three COBRA participants on the medical plan. The District is fully ensured through Florida Blue for medical and Florida Combined Life for Dental. In addition, the District offers a variety of supplemental benefits, such as vision, long-term care, short-term disability, cancer, and critical illness insurance. The purpose of this solicitation is to obtain one or more qualified advisors to offer technical advice and analytical services in support in the administration of the employee benefits program, primarily health and dental.

2. **OBJECTIVES**

Contractor is to provide technical advice and analytical services to the District to: (1) review the administration of its employee benefit programs and strengthen the benefit strategy, (2) increase bargaining power during negotiations with benefit vendors, (3) improve technical capabilities, and (4) enhance data analysis including actuarial analysis.

3. **SCOPE**

Contractor is responsible to provide the following services:

- Benefit Guidance
 - Assist in the development of short and long-term benefit strategies. If changes to a benefit program are made, assist in development of a transition plan to ensure alignment with benefit strategy and minimize challenges with transition.
 - Meet with District benefits administration staff on an as-needed basis to discuss benefit plans, vendors, and open issues.
 - Review programs to determine if competitive on regional, industry, and size basis using comparison tools for plan design and employer contribution levels.
 - Recommend alternative benefit designs or delivery systems, as dictated by emerging plan costs, benefit practices or alignment with strategy.
 - Provide compliance and regulatory support through the provision of information on benefit trends and the communication of new or proposed legislation or regulations impacting the District's benefit program.

- **Benefit Cost Strategies, Budgeting and Analysis Support — Health and Dental Insurance**
 - Provide advice and counsel regarding employee contribution strategies and resultant modeling and calculations of projected results.
 - Conduct actuarial analysis of claims to identify areas for cost management focus and assistance in renewal and marketing efforts.
 - Develop cost projections for budgetary and cost management purposes.
 - Analyze factors driving plan costs and recommend opportunities for improvement management of cost, access, and quality.
 - Perform specialized claims analysis, as requested, to support decision-making for changes to benefit design or to evaluate new benefit coverage.
 - Supply statistically credible benchmark data relevant to the District and other designed comparison points and benchmark benefit plan costs, design and employee contributions on an annual or as needed basis.
 - Provide advice and counsel regarding the feasibility of self-funding a benefit plan, including actuarial analysis of the potential for cost-savings and identification of other key considerations in decision-making process.
 - Provide technical guidance and assist in the development of a plan to transition to a self-funded arrangement, if the decision is made to make such a transition with a benefit plan.

- **Benefit Plan Procurement Support — Health and Dental Plans**
 - Conduct renewal strategy meeting with District to discuss and develop action plan for renewals based on budgetary and other constraints and input.
 - Request renewals from benefit vendors, conduct renewal analysis, and assist in negotiations with benefit vendors.
 - Assist in the solicitation of benefit vendors, including the development of solicitation documents, analysis of proposals (including network claims analysis and provider geographic location analysis), and assistance in negotiations.
 - Through analysis ensure the District's plan meet minimum affordability and minimum value and other ACA provisions.
 - Perform actuarial analysis, as needed.

- **Annual Work Plan and Quarterly Reporting – Health and Dental Plans**
 - Assist in the development of an annual work plan (including associated tasks and deliverables) for the District's health and dental plans.
 - Provide performance reporting and monitoring of the District's health and dental plans and status updates on the annual work plan. Reports should be made at least twice annually in both oral and written formats.

- **Vendor Relations — Health and Dental Plans**
 - Conduct meetings with benefit vendors to identify and resolve issues and monitor performance against performance standards, if applicable.

4. **PRICING FOR PROPOSED SOLUTION**

<u>Item</u>	<u>Total Cost</u>
Annual Flat Fee	\$_____

Respondent's quote shall be in the form of an annual flat-fee to perform the Work detailed in the attached Statement of Work. Respondent is responsible to provide quarterly reports for all work perform each quarter. The Successful Respondent also is responsible to submit an invoice to the District on a quarterly basis for 25% of the annual fee.

The budget for Fiscal Year 2021-2022 (October 1, 2021 – September 30, 2022), is \$50,000.

EXHIBIT 2 — INSURANCE

Consultant shall acquire and maintain until completion of the Work the insurance coverage listed below, which constitutes primary coverage. Consultant shall not commence the Work until the District receives and approves Certificates of Insurance documenting required coverage. Consultant's General Liability policy shall include Endorsement CG 20 10 04 13, or equivalent, naming the St. Johns River Water Management District (the "District") as Additional Insured. All required policies shall include:

(1) endorsement that waives any right of subrogation (Endorsement 24 04 05 09, or equivalent) against the District for any policy of insurance provided under this requirement or under any state or federal worker's compensation or employer's liability act; (2) endorsement to give the District no less than 30 days notice in the event of cancellation or material change. Certificates of Insurance must be accompanied by copies of the requested endorsements.

Any deductibles or self-insured retentions above \$100,000 must be declared to and approved by the District. Approval will not be unreasonably withheld. Consultant is responsible for any deductible or self-insured retention. Insurance must be placed with insurers having an A.M. Best rating of A-V or greater. District receipt of insurance certificates providing less than the required coverage does not waive these insurance requirements.

1. **Workers' Compensation Insurance.** Workers' compensation and employer's liability coverage, including maritime workers compensation, if applicable, in not less than the minimum limits required by Florida law. If Contractor claims an exemption from workers' compensation coverage, Contractor must provide a copy of the Certificate of Exemption from the Florida Division of Workers' Compensation for all officers or members of an LLC claiming exemption who will be participating in the Work. In addition, Contractor must provide a completed District "Affidavit (Non-Construction)" for non-construction contracts. Contractor is solely responsible for compliance with any Federal workers' compensation laws such as Jones Act and USL&H Act, including any benefits available to any workers performing work on this project.
2. **General Liability.** Commercial General Liability Insurance on an "Occurrence Basis," with limits of liability for each occurrence of not less than \$1,000,000 for personal injury, bodily injury, and property damage, with an aggregate of \$2,000,000. Coverage shall include: (1) contractual liability, (2) products and completed operations, (3) independent contractors, and (4) property in the care, control, or custody of Contractor. Extensions shall be added or exclusions deleted to provide the necessary coverage.
3. **Automobile Liability.** Minimum limits of \$100,000/\$300,000/\$100,000.
4. **Professional Liability.** With limits of \$1,000,000.
5. **Umbrella.** With limits of \$1,000,000.

AFFIDAVIT AS TO NON-COLLUSION AND CERTIFICATION OF MATERIAL CONFORMANCE WITH SPECIFICATIONS

This form to be included with quote submittal

STATE OF _____

COUNTY OF _____

I, the undersigned, _____, being first duly sworn, depose and say that:

- 1. I am the owner or duly authorized officer, representative, or agent of: _____ Respondent that has submitted the attached quote.
2. The attached quote is genuine. It is not a collusive or sham quote.
3. I am fully informed respecting the preparation and contents of, and knowledgeable of all pertinent circumstances respecting the attached quote.
4. Neither Respondent nor any of its officers, partners, owners, agents, representatives, employees, or parties in interest, including this affiant, has in any way colluded, conspired, connived, or agreed, directly or indirectly, with any other Respondent, firm, or person to submit a collusive or sham quote in connection with the Agreement for which the attached quote has been submitted, or to refrain from submitting in connection with such Agreement, or has in any manner, directly or indirectly, sought by agreement, collusion, communication, or conference with any other Respondent, firm, or person to secure through collusion, conspiracy, connivance, or unlawful agreement any advantage against the District or any other person interested in the proposed Agreement.
5. The price(s) quoted in the attached response are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of Respondent or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.
6. No official or other officer or employee of the District, whose salary or compensation is payable in whole or in part by the District, is directly or indirectly interested in this quote, or in the supplies, materials, equipment, work, or labor to which it relates, or in any of the profits therefrom.
7. Any materials and equipment proposed to be supplied in fulfillment of the Agreement to be awarded conform in all respects to the specifications thereof. Further, the proposed materials and equipment will perform the intended function in a manner acceptable and suitable for the intended purposes of the District.

Signature: _____

Title: _____

Subscribed and sworn to before me this _____ day of _____, 20 ____.

Notary Public, State of _____ at Large

My commission expires:

(SEAL)

EVALUATION OF RESPONSES

The evaluation committee will meet at 11:00 a.m. am on June 15, 2021, to discuss and rank the quotes. Responses shall include information or documentation regarding, and will be evaluated using, the following evaluation criteria:

1. An evaluation of proposed solutions will be based on the criteria set forth below.
2. Respondent’s answers to the questions and information provided in the Excel spreadsheet, including Respondent’s quote will be reviewed against the requirements identified in the Statement of Work — Section A; and Respondent’s pricing provided in Section B.

	CRITERIA	WEIGHT	SCORE	TOTAL
1	Letter of Transmittal and Overview of Organization (Item A of the Benefit Advisor Questionnaire — See Excel spreadsheet)	5%		
2	Staffing (Item B of the Benefit Advisor Questionnaire — See Excel spreadsheet)	5%		
3	Capabilities and Resources (Item C of the Benefit Advisor Questionnaire — See Excel spreadsheet)	25%		
4	Minimum Qualifications (Item D of the Benefit Advisor Questionnaire — See Excel spreadsheet)	25%		
5	Cost Effectiveness of Pricing (Section B of Quote) The responsive and responsible Respondent who submits the lowest proposed overall cost to the District’s budget will receive a raw score of “5.” All other responsive and responsible proposed costs will be scored proportionately.	40%		
	TOTAL	100%		

Evaluation Rating Scale: 1 – 5:

- 5 – Exceptional The submission exceeds expectations, excellent probability of success in achieving all objectives – very innovative.
- 4 – Good..... Very good probability of success. Achieves all objectives in reasonable fashion.
- 3 – Acceptable..... Has reasonable probability of success. Some objectives may not be met.
- 2 – Poor Falls short of expectations and has a low probability of success.
- 1 – Not acceptable..... Submission fails to meet requirements and the approach has no probability of success.
- 0 – Non Responsive Information/documentation provided is not adequate for evaluation.

The final selection of a Service Provider by the District will be based on the quote which best meets the needs of the District. The District reserves the right to reject any or all Responses.