

The background features a large, stylized, light blue Phoenix logo, which is a circular emblem with a bird-like shape in the center, set against a darker blue background. The logo is partially obscured by the text.

RFP 25-0462

Benefits Consulting Services

November 25, 2024 – 1:00 p.m.
Via WebEx

City of Phoenix
Finance Department



Housekeeping

- Please mute your microphones, unless you are speaking, to mitigate background noise and potential electronic feedback for the other participants.
- We will be touching on each major section of the solicitation, please try and limit your questions to the section being discussed.
- Please email your company name, first and last name, telephone number, and email address to the procurement officer: larry.jue@phoenix.gov



Legal Notice

The purpose of the Pre-Offer Conference is to provide a casual atmosphere to discuss the City's intent and to determine whether the City's requirements are clearly stated.

Although an exchange of information may take place, the official position of the City is that which is delivered in the solicitation document and in the form of a written Solicitation Addendum. Therefore, nothing said here today should be construed as a change to the written requirements in the solicitation document.

Any changes will be in the form of a solicitation addendum. Vendors must acknowledge receipt of any/all addenda by signing and returning the document with their submittal, or the response may be considered non-responsive.

Please note that it is the responsibility of the Offeror to read the entire solicitation document. Offerors must contact the Procurement Officer if they have any questions – **no other City employees per the Transparency Policy.**



Key Dates

Pre-Offer Conference

November 25, 2024
at 1:00 p.m.

Written Inquiries Due

December 3, 2024
at 2:00 p.m.

Offer Due Date

December 18, 2024
at 2:00 p.m.



Agenda

RFP 25-0462 Benefits Consulting Services

- 1.Solicitation Instructions Overview
- 2.Terms and Conditions Overview
- 3.Indemnification and Insurance Requirements
- 4.Scope of Work Overview
- 5.Review Submittal Requirements
- 6.Closing



Solicitation Instructions

- Minimum Qualifications
 - Seven years experience in providing:
 - Benefits Consulting and Actuarial Services
 - Pharmacy Benefits Management Consulting Services
 - Be lawfully authorized to conduct business in Arizona
- All offerors must register at:
<https://www.phoenix.gov/procure>
- The City will not be responsible for oral instructions made by employees or officers, any changes will be in the form of solicitation addenda



Solicitation Instructions

- Transparency Policy starts at solicitation opening and ends at Council Award
 - All communication through the Procurement Officer
 - Offerors that violate the policy shall be disqualified
 - Offerors may continue to conduct business unrelated to the solicitation
- Businesses **must** be registered with the Arizona Corporation Commission (this is checked)
- Evaluation Criteria
 - Qualifications, Experience and References...325 points
 - Method of Approach...375 points
 - Pricing...300 points



Terms & Conditions

- Standard Ts and Cs (Section 2.7) are the same for all City contracts
- Special Ts and Cs (Section 2.8) are specific to this solicitation
- Update vendor profile when changes occur to avoid payment issues
- Public Records provision
- Background screening of all contract employees is required, and the City has set this contract at the maximum risk level
- Please pay special attention to the Confidentiality and Data Protection provisions within the solicitation



Indemnification & Insurance

- Please note the indemnification provisions within the solicitation (Sections 2.9 and 2.10)
- Insurance requirements cover:
 - General liability
 - Automobile liability
 - Worker's compensation
 - Professional liability
 - Network Security and Privacy Liability
- **Upon award**, certificates of insurance (ACORD form or equivalent) must be provided to the City within 10-days



Scope of Work

- Exhibit A
- The City selects all third-party administrators necessary to provide coverage to City benefit Eligible Employees and their dependents.
- The Benefits Division requires consulting services in two areas:
 1. Employee Benefits Consulting and Actuarial Services
 2. Pharmacy Benefits Management Consulting Services
- The Benefits Division team will provide an overview



Submittals

- Email the proposal to procurement@phoenix.gov
- Review and follow Exhibit D – Submittal Instructions
- Be sure to complete and include the required submittal forms:
 - 24-Hour Emergency Contact
 - Certification Regarding Debarment, Suspension, and Other Ineligibility and Voluntary Exclusion
 - Years in Business and References
 - Costs and Payments
 - Offer page must be completed and signed (page 102)
 - Conflict of Interest and Transparency Form



Submittals

- Submit pricing using Exhibit B – Fee Schedule
- Be sure to complete and include the Benefits Consulting Services Questionnaire (Attachment 1)
- Do not submit links or password protected documents
- Late Offers will be rejected



Key Dates

**IMPORTANT
INFORMATION**

Written Inquiries Due **December 3, 2024, 2:00 p.m.**
(Email to the Procurement Officer, larry.jue@phoenix.gov)

Offer Due Date **December 18, 2024, 2:00 p.m.**
(Email to procurement@phoenix.gov)



Questions

