

**ADDENDUM NO. 1
TO
REQUEST FOR PROPOSALS 094-FF10 FOR
ADMINISTRATIVE SERVICES – SECTION 125
FLEXIBLE BENEFITS PROGRAM AND ENROLLMENT
FOR
THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA**

PURPOSE OF ADDENDUM

This Addendum has been prepared to answer specific questions submitted by proposers.

ACKNOWLEDGMENT OF ADDENDUM TO RFP

As required in the RFP, proposers are reminded that they should either acknowledge receipt of this Addendum on their proposal, or attach this Addendum to their proposal.

STATUS OF ADDENDUM

To date, this is the first Addendum that has been issued for the Request for Proposals for Administrative Services – Section 125 Flexible Benefits Program and Enrollment. At this time, no additional addenda are anticipated.

The following information is provided in response to proposers' specific questions:

1. Ref. Section II, page 9, Questionnaire: The solicitation requires the entire bid be included on a CD. Is it acceptable to provide the Technical Proposal on the CD and the Exhibits via hard copy?

The entire bid should be included on a CD; exhibits may be scanned into CD

2. Ref. Section III, Reports, page 28 and Exhibit A, page 70: The Internal Revenue Service issued Notice 2002-04 in April 2004 suspending indefinitely the requirements for public employers to file Form 5500. Will M-DCPS omit this from both the Scope of Work and the PS&G's?

All reference to Form 5500 should be ignored. However, all information contained in this form is to be submitted to the School Board annually.

3. Ref. Section III, Reports, pages 29 – 31: The RFP does not require services for benefits consulting and product negotiations; however, it does require the reporting of utilization and financial reporting for benefit products. How does M-DCPS anticipate these reports to be delivered if the administrator is not providing the benefits consulting and procurement services?

The Administrator acts as the liaison between the district and voluntary benefit carriers providing enrollment, eligibility, remittance and premium information. Additionally, it is a requirement of this RFP that the Administrator provide quarterly utilization and financial reports identified in the RFP. Services for benefits consulting and product negotiations are unrelated to this requirement.

4. Ref. Section III, page 36, Computer Capability, 1-i: Please provide a copy of the referenced M-DCPS ITS documented standards and specifications.

The Request for File Exchange and File Transfer Protocol (FTP) Specifications from the Office of Information Technology (ITS) are attached. The successful administrator will have the opportunity to meet with ITS to obtain additional information if necessary.

5. Ref. Section VI, page 54, Health Care, item h: Will M-DCPS require that the administrator calculate and report retroactive payroll adjustments (both positive and negative) and if so, how far back will these adjustments be required? If retroactive adjustments cross calendar years are there additional requirements for these adjustments? Will the administrator be required to provide taxation reporting for these adjustments?

At this time retroactive payroll adjustments are handled collaboratively between the Administrator, the Risk and Benefits Office and Payroll departments on an individual basis. Administrator will not be required to provide taxation information.

6. Ref. Section VI, page 54, Health Care, item i: Will M-DCPS require the administrator to maintain PCP/PDP information throughout the year for employees and dependents?

The Administrator must maintain PCP/PDP information throughout the year based upon initial enrollment for new hires and during the annual open enrollment period in order to transmit this information to the providers. Changes throughout the year will be handled by the various insurance carriers.

7. Ref. Section VI, page 54, Health Care, item i: Does M-DCPS anticipate that the administrator will track the employee and/or dependent's deductibles and co-payments? If yes, is the objective for future implementation of a Health Savings Account as mentioned on page 55?

The Administrator is not responsible for tracking deductibles and co-pays. Delete Health Care Item j. Deductibles and co-pays. The School Board is not considering implementation of a Health Savings Account at this time.

8. Ref. Section VI, page 54, Health Care item l: Please define what carrier "bill and pay" services are.

Delete Health Care Item l. Provide carrier "bill and pay" services

9. Ref. Section VI, page 56, Process/Activity/Service, item i: Please provide the approximate weight of the enrollment package that is distributed to the newly hired M-DCPS employees.

The current enrollment package for new hires weighs approximately two pounds.

10. Ref. Exhibit A, page 62, Performance Standards and Guarantees, Performance Standard 1: guarantees that the Administrator will provide a two week review time period for client review of the open enrollment materials. This time period has been consistently waived for the past 10 years due to union negotiations, last minute benefit finalization and other circumstances which make this an unrealistic expectation. Would you consider eliminating this guarantee?

No, however penalties would not be imposed if delay is due to School Board issues.

11. Ref. Exhibit A, page 62, Performance Standards and Guarantees, Performance Standard 2: references the production and delivery of enrollment materials for newly hired employees. These materials were combined in the open enrollment materials for the 2006 plan year. Will the School Board therefore eliminate this standard?

No, this will remain in the event that the materials are separated in the future.

12. Ref. Exhibit A, page 64, Performance Standards and Guarantees, Performance Guarantee 2(A): has been waived for the past five years. We suggest this Performance Standard be eliminated.

We are committed to implementation of a defined metric to properly measure our employees' satisfaction. This Performance Standard and Guarantee remains a requirement of the RFP.

13. Ref. Exhibit A, page 66, Performance Standards and Guarantees, Performance Standard 6(A): has been modified to include medical files and now is a duplication of Performance Standard 6(B). We suggest the former wording be left in place or Performance Standard (B) be eliminated.

Delete the words "Medical and" from Performance Guarantee 6(A).

14. Ref. the May 8, 2006 letter in reference to this RFP: which was discussed at the pre-bid conference. Please provide a copy of the referenced "pre-bid" notification letter, a list of recipients and any other correspondence relating to the pre-bid notice.

A sample of the May 8, 2006 letter is attached along with the recap of the responses.

15. Will the School Board accept a stand alone proposal for the debit card offered by the Board in conjunction with its Medical Flexible Spending Account?

The School Board is seeking one Administrator to provide all services. However, subcontractors may be used to provide certain services such as the debit card, subject to approval of the Office of Risk and Benefits Management.

16. Will the annual Open Enrollment and Spring Enrollment periods ever be merged?

The School Board does not anticipate merging the two enrollment periods.

17. Delineate the benefits offered to retirees, part-timers, etc.

Pursuant to Section 112.081, Florida Statutes, the School Board must make medical, life and flexible benefits available to retirees (see DESCRIPTION OF THE EMPLOYER GROUP, page 5 of RFP). Details of benefits provided to various classes of employees are provided in Exhibit D, SCOPE OF SERVICES, pages 101-103.

18. Would a new Administrator be able to offer new insurance providers during Spring Enrollment?

As a result of Requests for Proposals (RFP) the School Board entered into new insurance contracts for Spring 2006 Enrollment. Therefore, it is not anticipated that RFPs would be generated within the next few years.

19. What is the minimum A. M. Best rating requirement for voluntary benefits carriers?

The Board requires a minimum A. M. Best rating of A-.

20. In SECTION IV, ADMINISTRATIVE ACTIVITIES FOR FEE DETERMINATION, 11. Why does it show "26,400 individual meetings, 15 minute duration" when annual open enrollment is conducted online?

Since the Board began an annual online enrollment process it utilizes its enrollment representatives more strategically to service approximately 16-20 locations for those employees with limited online access. Twenty representatives are hired by the Administrator for the open enrollment period to handle these specific locations and to assist employees who come to the Office of Risk and Benefits Management. Three additional representatives are hired for the open enrollment period through January to assist with finalization of the open enrollment process. All representatives may make presentations at Benefits Fairs and all attend a week long training session to prepare for the open enrollment program.

21. Provide fee history (rate and total remuneration) for Administrator for the past three (3) years
22. Provide amount of performance penalties paid by Administrator for the past three (3) years
23. What commissions were earned by current Administrator as a result of Spring Enrollment for the past three (3) years?

Responses to questions 21, 22 and 23 are provided in the table below:

The following information is provided in response to questions 21, 22 and 23 above:

	2003	2004	2005	2006
PEPM Fee	\$ 6.15	\$ 6.15	\$ 6.15	\$ 6.12
Fees Paid	\$ 3,031,862	\$ 3,044,896	\$ 3,196,942	\$ 3,135,227*
PS&G Penalty Paid	\$ 6,195.	\$ 2,770.	\$ 6,555.	-
Gross Commissions Spring Enrollment (1)	\$ 1,983,685	\$ 2,156,049	\$ 1,634,564	\$1,326,829**
Net Commissions Spring Enrollment (2)	\$ 793,773	\$ 919,759	\$ 794,854	\$663,410**

Commissions are annualized by calendar year

(1) Gross Commissions paid by provider companies

(2) Net commissions received by FBMC – net commissions are derived by taking gross commissions less enrollment expenses

* Annualized projected fees for 2006 based on April 2006 participation

** 2006 Gross & Net commission data is based on enrollment information available at this time; however, underwriting and issuance of policies has not been completed. (First payroll deductions are not scheduled to be taken until September 2006. Relevant enrollment expenses have not settled and commissions will not flow until the November timeframe.)



Miami-Dade County Public Schools - Office of Information Technology
Request For File Exchange

1. Requestor Information		Request Type
Requestor:	Team:	<input type="checkbox"/> Send <input type="checkbox"/> Receive
Date:		

2. Agency Information – General **		
Name:	Contact Person:	
Contact E-Mail:	Phone: (SUNCOM)	Ext:

3. Agency Information – FTP Server Account Information (To Be Completed By Network Administration) **		
FTP Directory:	User Name:	Password:

4. File Information – Sending	
Agency's PGP Key ID:	NOTE: Agency must send a copy of its PGP Public Key via e-mail
Dataset Name:	Upload Name/Prefix:
Encrypted File Name: (must end with .PGP)	
<input type="checkbox"/> Agency Will Download File From OIT (Strongly Recommended) **	
Incoming IP Address: **	Subnet Mask: **
<input type="checkbox"/> Upload File To Agency's Remote Server **	
Remote Server IP Address: **	Upload Directory: **
User Name: **	Password: **

Security Checklist – To Be Completed By Data Security			
<input type="checkbox"/> PGP Key Validated **	Initials:	<input type="checkbox"/> PGP Public Key Added To Keyring **	Initials:

5. File Information – Receiving						
Incoming File Name: (if encrypted, must end with .PGP)	Incoming IP Address:	Subnet:				
Dataset Name:	<input type="checkbox"/> Data Received Is Encrypted		<input type="checkbox"/> Append Data			
Dataset Attributes:	<input type="checkbox"/> TR <input type="checkbox"/> CY	PRI:	SEC:	BLK:	RECFM:	LRECL:
Security Checklist – To Be Completed By Data Security						
<input type="checkbox"/> OIT PGP Public Key Sent To Agency **			<input type="checkbox"/> RACF Authorization Completed			

6. Transfer Confirmation	
NOTE: Teams and Production Control will automatically receive confirmation via e-mail	
<input type="checkbox"/> Send Confirmation To Agency	E-Mail Address:

NOTE: ITEMS MARKED WITH ** DO NOT NEED TO BE COMPLETED IF AGENCY IS CURRENTLY EXCHANGING FILES WITH OIT.

Instructions

Requestor Information

Write the name of the person requesting the file transfer, the team on which the person belongs and the date of the request.

Request Type

If the file is being sent to an outside agency/organization or individual, check "Send." If the file is being received from an outside agency/organization or individual, check "Receive."

Agency Information

Write the name of the agency/organization or individual with whom data will be exchanged. Indicate a contact person, phone number and extension if possible.

FTP Server Account Information

The network administrator of the WATS FTP server will complete this section.

File Information – Sending

This section contains the information for processing files being sent from OIT.

Field	Explanation
Agency PGP Key ID	This is a hexadecimal ID number that the PGP security software assigns to public keys. The agency receiving the data should be able to provide you this information. NOTE: The outside agency/organization must e mail a copy of its public key to you for files to be sent.
Dataset Name	This is the name of the dataset that will be sent to the agency.
Upload Name/Prefix	This is the name of the file that the mainframe will create on the OIT FTP Server. If the file has a date in the name (such as month and year), indicate the "prefix" of the file name (the first few characters which do not change each month) and write an asterisk after the prefix. EXAMPLE: The prefix "CO050*" would allow processing of file names "CO050011999", "CO050012000", "CO050022000", etc.
Encrypted File Name	This is the name of the file that the outside agency is expecting to receive. It may be different from the Upload Name/Prefix. In most cases, it should be the same as the Upload Name/Prefix, but with the .PGP file extension added. If the file name is the same, write "SAME.PGP." This will preserve the Upload Name/Prefix, but add the .PGP extension when the file is encrypted. EXAMPLE: "SAME.PGP" would convert "CO050011999" to "CO050011999.PGP". NOTE: If not "SAME.PGP", the file name must be exact. The name will not change each month.
Upload File To Agency's Remote Server	If the agency wants OIT to upload the file to its FTP Server, check this box. Some additional information (explained below) is needed.
Remote Server IP Address	This is the TCP/IP network address of the agency's server. Example: 168.221.15.69
Upload Directory	If the agency wants the file uploaded in a specific directory on its server, indicate the directory path here.
User Name & Password	This is the login information needed to connect to the agency's server.
Security Checklist	Data Security will complete this section.

File Information – Receiving

This section contains the information for processing files being sent to OIT.

Field	Explanation
Encrypted File Name	This is the name of the file that the outside agency is sending to OIT. The file name must end with ".PGP". NOTE: The file name must be exact. The name cannot change each month.
Dataset Name	This is the name of the dataset that will be placed on to the mainframe.
Security Checklist	Data Security will complete this section.

Miami-Dade County Public Schools Information Technology Services File Transfer Protocol (FTP) Specifications

- Outside agency must be able to utilize Pretty Good Privacy (PGP) Encryption Software for all incoming and outgoing FTP files.
- Outside agency must deliver data to M-DCPS server in PGP encrypted format.
- Outside agency must pickup data from our M-DCPS server in encrypted PGP format. Outgoing files will not be sent to outside agency server.
- For incoming files to M-DCPS data must be encrypted with M-DCPS public key and signed with the agency's private key. M-DCPS will provide public key.
- For outgoing files from M-DCPS, data is encrypted using the agency's public key and placed on M-DCPS server for pickup. Outgoing files will not be delivered to another agency's server and must be retrieved from the M-DCPS server. Email address, contact information, IP address and PGP public key must be provided to M-DCPS. See Request for File Exchange Form.

May 8, 2006

To: Prospective H&W Administration RFP Recipients

Miami-Dade County Public Schools (“M-DCPS”) is the fourth largest public school system in the U.S. with over 45,000 employees and retirees. M-DCPS presently uses Fringe Benefits Management Company (“FBMC”), a Florida-based organization for various health and welfare administrative services. The contract with FBMC expires on 12/31/2006 and M-DCPS is interested in seeking competitive proposals for health and welfare administrative services including:

- Management of annual (Fall) enrollment and Spring enrollment programs and status changes throughout the year via paper, Internet and in-person processes (not telephonic);
- Eligibility verification, maintenance and transmittal to M-DCPS and various insurance carriers;
- Maintenance of beneficiary information for Life and AD&D programs;
- Provision of 6 FTEs onsite at M-DCPS for ongoing customer and administrative services;
- Administration of medical and dependent care FSA programs;
- Consulting and placement of coverage for certain voluntary benefit programs (long term care, universal life, critical illness);
- Providing taxation information, including calculations for domestic partners, to M-DCPS for W-2 preparation;
- Retiree direct billing, pension deductions, and Leave of Absence billing;
- Preparation and distribution of all benefit communication materials (booklets, Open Enrollment guides, etc.); and
- Other related services (detail will be provided in RFP specifications).

Prior to releasing the RFP, we wish to collect some basic information about your organization. Based on your response to this letter, we will assess your interest in providing H&W administrative services to M-DCPS. Please provide a written response to the following questions to Andrew Coccia at Deloitte Consulting (acoccia@deloitte.com) with a copy to Nicole Novotny (nnovotny@deloitte.com) no later than Tuesday, May 16th.

Thank you in advance for your response. Please feel free to call me if you have questions or wish to discuss (203-708-4739).

Andrew Coccia
Senior Manager

cc: John Erb, Deloitte Consulting
Carol Erbs, M-DCPS

M-DCPS Health & Welfare Administrator Request for Information (#1)

1. Is your organization licensed to provide health and welfare administrative services in the State of Florida? If not, are you willing to obtain a license by January 1, 2007?
2. Do you have a service center in Florida? If yes, where? If not, where is your closest service center?
3. Do you have banking relationships in Florida with qualified public repositories?
4. How many years have you been in business? How long have you been licensed in Florida?
5. For how many clients do you provide H&W administrative services? Of these, how many have greater than 10,000 employees/retirees?
6. On behalf of how many members (employees/retirees) do you provide H&W administrative services?
7. List the public entities that you serve that are comparable in size to M-DCPS (45,000 employees and retirees).
8. If you were awarded the H&W administrative services contract, effective 1/1/07, how much lead time (rough estimate) would you require for implementation (note – the incumbent carrier would perform the Fall annual enrollment)?
 - a. If you are not capable of meeting a 1/1/07 effective date, please describe your proposed effective date, assuming business is awarded in the Fall of 2006.
9. Are you interested in receiving an RFP from M-DCPS? If yes, to whom should the RFP be directed?

M-DCPS

Section 125 RFP

Responses to Request for Information (RFI)

RFI Recipient	Response
Accenture HR Services	Declined
Aon	Declined
Convergys	Declined
CoreSource, Inc.	Declined
ExcellerateHRO/Towers	Declined
Mercer	Declined
Professional Benefit Administrators, Inc.	Declined
Watson Wyatt	Declined
WebTPA formerly Employers Mutual, Inc.	Declined
Administrative Services, Inc.	No Response
Co-ordinated Benefit Plans, Inc.	No Response
Hillcrest Benefit Administrators	No Response
Acordia National, Inc.	Responded
ACS (Mellon HRIS) -- BUCK	Responded
Automatic Data Processing, Inc (ADP)	Responded
Benefits Outsource, Inc.	Responded
CitiStreet	Responded
Fiserv (Benesight)	Responded
Hewitt Associates	Responded
SHPS	Responded

M-DCPS
Section 125 RFP
Responses to Request for Information (RFI)

Questions	Acordia National	ACS	ADP	Benefits Outsources, Inc. (BOI)	CitiStreet	Fiserv (Benefits)	Hewitt	SHPS
1. Is your organization licensed to provide health and welfare administrative services in the State of Florida? If not, are you willing to obtain a license by January 1, 2007?	Acordia National is licensed in all states that require licensure. This documentation is kept on file in Acordia National's Comptroller's office. If not, are you willing to obtain a license by January 1, 2007? Not applicable.	ACS has a corporate relationship with a licensed third party administrator, ACS Health Administration Inc. If after further due diligence and review, the activities required to be performed under this agreement are inconsistent with that relationship, ACS would pursue the appropriate licensing as necessary.	Yes.	Yes. Benefits Outsourcer, Inc. (BOI) is licensed by the State of Florida to provide health and welfare administrative services.	Yes.	Yes. We are licensed to provide health and welfare administration services in Florida.	Hewitt is currently licensed to provide health and welfare administration and consulting services in the State of Florida. Hewitt has licenses via individual employees who are designated to represent Hewitt in Florida. These licenses are for both resident and nonresident statuses. At this time, Hewitt does not have an organizational license because we would be required to fingerprint all of the members of the Board of Directors. We are not looking to secure an organizational license based on this requirement, and feel that the individual licenses provide us with the proper legal and regulatory coverage to operate our Orlando center and serve our clients with Florida operations.	Yes. SHPS, Inc. is a corporation organized in the state of Florida.
2. Do you have a service center in Florida? If yes, where? If not, where is your closest service center?	All Claims and Customer Service is handled by Acordia National located in Charleston, WV. Claims processing occurs Monday-Friday 6:45 a.m. - 7 p.m., EST. Customer Service inquiries are available from 7:00 a.m. - 7:00 p.m., EST, Monday-Friday. The account representative and team manager involved in the servicing of your account will be determined based on your input and requirements during the proposal process considering the available staffing assignments during implementation. Immediately upon notification that we have been selected as your administrator, we would assemble a team responsible for installing and maintaining your account. The Account Representative, your internal advocate in our organization, will be the project manager for the implementation. After the installation is complete, the Account Representative will become your single source to contact for any questions concerning the day to day administration of your plan (claims issues, system questions, reporting needs, etc.) The Account Executive will be responsible for the strategic management of your benefit program providing you	Yes. ACS maintains service centers in Fort Myers and Tallahassee Florida.	Des Moines, IA and Salt Lake City, UT	The service center for BOI is located at our office in Hallandale, Florida.	Yes. CitiStreet has a contact center in Jacksonville, Florida.	Yes. Fiserv Health has claim and customer service offices located in the following cities/states: Lake Mary, FL; Lexington, KY; Rockford, IL; Wausau, WI; San Antonio, TX; Des Moines, IA; Phoenix, AZ	Yes. Hewitt has a service center in Orlando, FL. This center has approximately 1,200 Associates dedicated to providing comprehensive outsourcing and consulting services. The service center in Orlando opened on July 7, 1997.	Not at this time. The closest SHPS' location is in Atlanta, Georgia.
3. Do you have banking relationships in Florida with qualified public repositories?	Not currently. However, we are willing to continue working with your in force banking relationship or could have our parent company Wells Fargo assist us in this situation.	Yes. ACS has banking relationships with Wachovia, Bank of America, and SunTrust.	ADP needs additional information to respond to this question.	Yes, BOI does have banking relationships in Florida with qualified repositories.	Yes.	Yes, we have banking relationships with qualified repositories in Florida. To name a couple, Northern Trust Bank and Marshall & Isley (M&I) Bank are among those relationships. Fiserv, Inc., our parent company, as a provider of information management systems and services to the financial industry has banking relationships nationwide.	Yes. Hewitt currently performs banking transmissions with a member of the Chase banking group located in Tampa.	Not at this time.

	<p>1. Acordia National, Inc. is a subsidiary of Acordia Mid-Atlantic, headquartered in Charleston, WV. Acordia of West Virginia and Acordia National became a part of the Acordia family with the purchase of McDonough Caperton Insurance Group by Acordia in 1993. Prior to the purchase McDonough Caperton had been in the large case claims administration business since 1976. Acordia National is recognized as one of the top health insurance claims administrators in the nation. We pay claims on over 450 companies with over 500,000 employees. In May, 2001 Wells Fargo, a \$289 billion Minneapolis bank, bought Acordia Insurance. W.G. Caperton founded Acordia in Charleston as McDonough-Caperton Insurance in the 1930's. Wells Fargo is the fourth-largest U.S. bank with 5,400 locations. It's one of the largest mortgage and student loan banks in the country. It offers investment, venture capital and international trade. With the purchase of Acordia, we are the fifth-largest U.S. insurance broker. How long have you been licensed in Florida? Acordia National is licensed in Florida for more than ten years.</p>	<p>While Affiliated Computer Services, Inc. was founded in 1988, its subsidiary ACS HR Solutions, LLC and its legacy firms have provided benefits consulting and administration services for nearly a century. ACS' benefit outsourcing services evolved over time as a compliment to consulting relationships and services. The following list highlights some of these services with their introduction date:</p> <ul style="list-style-type: none"> Benefit Consulting and Actuarial Services including benefit calculations and limited participant interaction - 1916 Defined Contribution Administration Services - 1971 Health & Welfare Administration Services - 1989 Defined Benefits Administration Services - 1993 Total Benefits Outsourcing Services - 1994 Full Human Resources Outsourcing (HRO) - 2002 	<p>15+ for H&W Administration Services. How long have you been licensed in Florida? Since then.</p>	<p>BOI has been in business since June 4, 1995, almost 11 years. The company has been licensed by the State of Florida since November 16, 1999.</p>	<p>CitiStreet, LLC was created in April 2000 as a joint-venture, equally owned by State Street Corporation and Citigroup. CitiStreet's heritage goes back 52 years to 1954 when State Street Bank & Trust began offering retirement recordkeeping services. CitiStreet, through our legacy companies, has been licensed in Florida since 1991. Additional background can be found in the attached CitiStreet Distinctions document.</p>	<p>In 2005, Fiserv Health, a division of Fiserv, Inc., combined its individual third party administration (TPA) businesses into one organization under the Fiserv Health brand. This move enables us to leverage technology, best practices, and strengths to provide customers with industry-leading tools for controlling health care costs. With a combined history of more than 200 years, Fiserv Health has the experience and strength to accommodate our customers' needs and the flexibility to tailor solutions that make sense. We serve more than four million members and more than 1,700 customers, making us one of the largest third party administrators in the country. We have been licensed as a TPA in Florida since 1996.</p>	<p>Hewitt Associates was founded in 1940 and has been in business 66 years. Hewitt has been licensed in Florida since 1997.</p>	<p>SHPS began providing health and welfare outsourcing in 1986. SHPS does not require a license in Florida as we are exempt under statute 627.6692 (6)(c).</p>
<p>4. How many years have you been in business? How long have you been licensed in Florida?</p>								
<p>5. For how many clients do you provide H&W administrative services? Of these, how many have greater than 10,000 employees/retirees?</p>	<p>5. We provide Administrative services to approximately 390 clients. Of these, how many have greater than 10,000 employees/retirees? Six. Under 200:122 201 - 500:87 501 -1,000:49 over 5,000:6 Total 284 medical/dental clients</p>	<p>ACS provides health & welfare administrative services to 39 clients. Of these, 18 have more than 10,000 employees/retirees.</p>	<p>Over 141. Of these, how many have greater than 10,000 employees/retirees? 25</p>	<p>BOI provides H&W administrative services for approximately 150 clients. Of these, there are 2 clients with greater than 10,000 employees.</p>	<p>CitiStreet provides health & welfare administration services to 12 clients of which 11 have greater than 10,000 employees/retirees.</p>	<p>Fiserv Health currently provides services for 1,700 clients. Of those clients, 20 have greater than 10,000 employees.</p>	<p>Hewitt provides health and welfare outsourcing services to 201 clients. 124 of these have over 10,000 plan participants (employees/retirees).</p>	<p>SHPS currently provides health and welfare outsourcing administration services for 105 clients. Fifteen of our H&W clients have greater than 10,000 employees.</p>
<p>6. On behalf of how many members (employees/retirees) do you provide H&W administrative services?</p>	<p>Covered employee lives:482710 Self Insured 348 cases with 466,710 employees Acordia National currently administers over 4,000 different benefit plans for approximately 390 employer groups. This represents approximately 400,000 employees and over 1 million members total. 40,000 participants currently in our FSA administrative programs.</p>	<p>937,500</p>		<p>The client base (employees/retirees) that BOI provides H&W administrative services for totals 923,000</p>	<p>Through our 12 health & welfare clients, CitiStreet supports over 1.0 million members.</p>	<p>Fiserv Health currently provides services for 1,844,981 employees.</p>	<p>Hewitt provides H&W administrative services to roughly 7.07 million participants (employees/retirees).</p>	<p>SHPS provides H&W administrative services to approximately 1,677,191 members.</p>
<p>7. List the public entities that you serve that are comparable in size to M-DCPS (45,000 employees and retirees).</p>	<p>5. Public Employees Inc</p>	<p>ACS provides health & welfare administrative services to two public clients that are comparable in size to M-DCPS. However, due to contractual obligations, ACS is precluded from naming these clients in our response. Separately, ACS is a leading provider of services for public entities. ACS provides an array of services outside of benefit administration to 17 public clients that are comparable in size to M-DCPS.</p>	<p>Don't think we have any other size but have many public entities that are very large.</p>	<p>Public entity which BOI services that somewhat compares to M-DCPS is: The School Board of Broward County (currently) Dade County Government (in partnership with Pricewaterhousecoopers)</p>	<p>Currently, all of CitiStreet's health & welfare clients are private corporations. As stated above, we provide health & welfare administration services to over 1.0 million participants representing large national, regional and local companies. Some of our current health & welfare clients include Qwest Communications, Baylor Health System, Saint-Gobain Corporation, CBS/Viacom and our parents, Citigroup and State Street Corporation. In the public sector since 1978, CitiStreet provides 401(a), 401(k), 403(b) and 457 retirement plan administration services to more than 876,000 participants. We support large state plans (e.g., State of Florida, Arkansas, Michigan and Texas) and local programs, including several Florida school districts (e.g., Broward County Public Schools, Martin County Schools, Orange County Public Schools and Palm Beach County Schools). By partnering with CitiStreet, Miami-Dade County Public Schools would benefit from our significant experience in working with public entities and in the health & welfare arena. We can deliver an effective solution th</p>	<p>To preserve the confidentiality of our customers, we are not providing their names. To provide their names, we would need a signed confidentiality agreement and permission from the customer. We will however, provide the employee enrollments of Fiserv Health's largest clients: • Client 1: 180,000+ Client 2: 122,201+ Client 3: 122,131+ Client 4: 85,500+ Client 5: 39,171 We currently serve more than four million members (employees and dependents) and more than 1,700 clients, making us one of the largest third party administrators in the country. Out of our total number of clients, we currently provide services for 5 state governments, more than 30 municipalities, and more than 20 school systems/educational institutions.</p>	<p>Hewitt Associates serves public and quasi-public organizations including the following organizations: The United States Office of Personnel Management The Securities and Exchange Commission The American Red Cross The Federal Reserve Bank Los Alamos National Laboratories In addition, we serve over 200 other private and public entities with similar characteristics to M-DCPS but are restricted contractually from sharing their names without prior consent.</p>	<p>As a private company, information surrounding our clients is considered proprietary information. SHPS has 1,100 clients across all lines of business, which include health management solutions, human resource solutions, and carrier and middle market solutions. Clients include 85 Fortune 500 corporations and 116 Fortune 1000 organizations. Of those clients, five are public entities with over 45,000 employees and retirees.</p>

<p>8. If you were awarded the H&W administrative services contract, effective 1/1/07, how much lead time (rough estimate) would you require for implementation (note – the incumbent carrier would perform the Fall annual enrollment)?</p>	<p>8. Minimum lead time would be thirty (30) to sixty (60) days.</p>	<p>While ACS typically suggests at least six to eight months to implement for annual enrollment and nine to 11 months for ongoing administration, using this methodology it has performed health & welfare implementations in less than seven months. The client's business needs and ability to secure appropriate resources for the conversion process always drive the implementation timeline.</p>	<p>July</p>	<p>BOI, albeit has the knowledge-base to perform H&W administrative services for M-DCPS, do not have the staff, credentials nor experience required to become sole administrator. Nonetheless, we solicit and encourage Deloitte Consulting to consider our expertise to participate as a sub-contractor or partner in conjunction with the firm(s) qualified, credentialed and capable to successfully perform such administrative services for its client.</p>	<p>To successfully transition the M-DCPS health & welfare program to CitStreet, we estimate a transition period of six to nine months from the contract award date. The variable in the timeline is directly related to the complexity of the plan administration, eligibility rules and cleanliness of supporting data.</p>	<p>We would not have any problem with an effective date of January 1, 2007. If possible, we would prefer 90 days prior to the effective date for implementation.</p>	<p>Hewitt's typical implementation timeframe for health and welfare outsourcing services is six to seven months. However, depending on the amount of data to be converted, level of complexity, plan rules and other service requirements, we may be able to shorten this timeframe. As such, we should be able to meet the 1/1/07 target live date assuming we began the implementation in early to mid June. We would welcome the opportunity to talk with you further about your needs and the timing of this deployment.</p>	<p>A standard Benefits Administration implementation at SHPS is 90-120 days. The total time for implementation will vary depending upon the number of payroll and carrier interfaces, the number and complexity of plan designs, the complexity of the client's business rules and the type of services being implemented.</p>
<p>a. If you are not capable of meeting a 1/1/07 effective date, please describe your proposed effective date, assuming business is awarded in the Fall of 2006.</p>	<p>8. Richard Legg, Managing Senior Vice President, Chief Operating Officer, Acordia National, Charleston, WV, 25301. Email to Richard_Legg@acordia.com</p>	<p>ACS' goal would be to meet and discuss needs with M-DCPS to determine what is driving the 1/1/07 date. Due to being at the mid-year point, further discovery is needed to identify all tasks associated with the transition, which would then allow ACS to truly set realistic expectations for this engagement. Therefore, ACS would expect to set a firm "go live" date after further discussion.</p>	<p>???</p>	<p>Yes, BOI is interested in receiving the RFP from M-DCPS. Please forward the proposal to: Jackson Obasogie Benefits Outsource, Inc. 800 E. Hallandale Beach Blvd., Suite 15 Hallandale, FL 33009 jobasogie@bellsouth.net (954) 458-6949 Tele (954) 458-3015 Fax</p>	<p>Yes, CitStreet is interested in receiving an RFP from M-DCPS. Please forward the RFP to: J.B. Cross, CEBS Senior Vice President CitStreet, LLC 8900 Freedom Commerce Parkway Jacksonville, FL 32256 Direct: 904-791-2035 Mobile: 904-347-9023 Email: jeross@citstreetonline.com</p>	<p>Yes, we look forward to receiving an RFP from Miami-Dade County Public Schools. Please e-mail the information to sales executive, Bill Burton at BBurton@benesight.com. If you need to contact Bill by phone, his phone number is (413) 733-3053.</p>	<p>Yes. Please forward the RFP (MS-Word format preferred) to Mary Ann Parfitt at Hewitt Associates: Mary Ann Parfitt Hewitt Associates HR Outsourcing Benefits Sales and Accounts marvann.parfitt@hewitt.com</p>	<p>Yes. Please send any correspondence for an RFP from M-DCPS to Geanene Aube at 3300 Millwater Crossing, Dacula, GA 30019. Her phone number is 678-714-9538 and her email address is geanene.aube@shps.com.</p>
<p>9. Are you interested in receiving an RFP from M-DCPS? If yes, to whom should the RFP be directed?</p>	<p>8. Richard Legg, Managing Senior Vice President, Chief Operating Officer, Acordia National, Charleston, WV, 25301. Email to Richard_Legg@acordia.com</p>	<p>Yes. Please direct the RFP to: William T. Beauchamp ACS One Penn Plaza - 30th Floor New York, NY 10119-4798 212.330.1146 William.Beauchamp@acs-inc.com</p>	<p>Yes</p>	<p>Yes, BOI is interested in receiving the RFP from M-DCPS. Please forward the proposal to: Jackson Obasogie Benefits Outsource, Inc. 800 E. Hallandale Beach Blvd., Suite 15 Hallandale, FL 33009 jobasogie@bellsouth.net (954) 458-6949 Tele (954) 458-3015 Fax</p>	<p>Yes, CitStreet is interested in receiving an RFP from M-DCPS. Please forward the RFP to: J.B. Cross, CEBS Senior Vice President CitStreet, LLC 8900 Freedom Commerce Parkway Jacksonville, FL 32256 Direct: 904-791-2035 Mobile: 904-347-9023 Email: jeross@citstreetonline.com</p>	<p>Yes, we look forward to receiving an RFP from Miami-Dade County Public Schools. Please e-mail the information to sales executive, Bill Burton at BBurton@benesight.com. If you need to contact Bill by phone, his phone number is (413) 733-3053.</p>	<p>Yes. Please forward the RFP (MS-Word format preferred) to Mary Ann Parfitt at Hewitt Associates: Mary Ann Parfitt Hewitt Associates HR Outsourcing Benefits Sales and Accounts marvann.parfitt@hewitt.com</p>	<p>Yes. Please send any correspondence for an RFP from M-DCPS to Geanene Aube at 3300 Millwater Crossing, Dacula, GA 30019. Her phone number is 678-714-9538 and her email address is geanene.aube@shps.com.</p>