

**COLORADO MOUNTAIN COLLEGE**



**Request for Proposal  
Number #462-10**

**Flexible Spending Account Administration**

**Due:**

April 08, 2010 at 4:00 pm Mountain Time

**Buyer:**

Steve Boyd  
Purchasing and Contracts Manager  
831 Grand Avenue  
Glenwood Springs, CO 81601  
[sboyd@coloradomtn.edu](mailto:sboyd@coloradomtn.edu)

**COLORADO MOUNTAIN COLLEGE**  
**REQUEST FOR PROPOSAL #462-10**  
**Flexible Spending Account Plan Administration**

**I. INTRODUCTION**

Colorado Mountain College (CMC) is a two-year public College established in 1967, and includes three residential campuses, eight commuter campuses, a Distance Learning program and administrative offices. The Colorado Mountain College District covers all or part of thirteen counties in Colorado, encompassing 12,000 square miles.

The college is seeking to retain a service provider to administer our Wellness and Flexible Spending Account plans. Service will begin on 07/01/2010 and the term of the contract is expected to be three years (subject to negotiation).

CMC's plan document was previously drafted by outside legal counsel and will be provided to the winner upon contract award. The Flexible Spending Account plan is considered governmental, thereby not subject to many of the ERISA requirements. Proposers should have internet reporting capabilities for our users, ACH and debit card options, and sufficient customer service capabilities defined both by hours of operation and method of service delivery (email, phone, etc.)

Specifically, the plan administrator will be expected to provide the following:

1. Maintain required plan documents for the College and its participants
2. Maintain a summary plan description along with enrollment and re-enrollment materials
3. Maintain complete records by company and by participant
4. Receive payroll withholding reports from the college
5. Receive and process claims from participants
6. Calculate amounts of payments/reimbursements to be made under each benefit option
7. Issue reimbursement checks or direct deposits for participants
8. Prepare and distribute participant benefit statements and summaries to participant web site
9. Prepare periodic reports on the operation of the plan for review by the college HR department
10. Receive funds and contributions (check or ACH) for the plan from the college and its participants, and use such funds to pay the benefits under the plan and administrative costs and fees of administration.

The college anticipates approximately 180 participants in the flex plan, and 380 full-time employees in the wellness plan. Plan includes contributions from employer and employee. Please submit your pricing on a per participant basis. Submittal instructions and the selection criteria are outlined below.

**II. TIMELINE**

CMC reserves the right to modify this timeline at any time. Any changes will be posted to the CMC Purchasing Department's website as soon as the information is available. All times are Mountain.

<b>REQUISITION STEP</b>	<b>DATE</b>	<b>TIME</b>
<b>ISSUE DATE</b>	<b>03-08-2010</b>	<b>04:00 PM</b>
<b>REQUEST FOR PROPOSALS (RFP) DUE</b>	<b>04-08-2010</b>	<b>04:00 PM</b>
<b>INTERVIEWS OF SHORTLISTED CANDIDATES (IF NECESSARY)</b>	<b>WEEK OF 04-19-2010</b>	<b>TBD</b>
<b>TARGET AWARD DATE (SUBJECT TO CHANGE)</b>	<b>04-30-2010</b>	<b>04:00 PM</b>

### III. INSTRUCTIONS TO PROPOSERS

- CMC endeavors to provide a uniform distribution of information to vendors and conduct a fair selection process. We ask that you please follow these instructions carefully. Any submittal that does not meet the requirements set forth in this document and any Addendums will not be considered by the Selection Committee.
- All information related to this Proposal will be posted in the Bids, RFP's... section of the Purchasing Office's website at [www.coloradomtn.edu/Purchasing](http://www.coloradomtn.edu/Purchasing). Please click on "Bids, RFP's..." and find this solicitation. This location will hold the most current and accurate documentation available for this project. Please look to this link for answers to your questions.
- Questions regarding this RFP should be directed to the Purchasing Manager, Steve Boyd, via email at [sboyd@coloradomtn.edu](mailto:sboyd@coloradomtn.edu). The College will attempt to answer all legitimate questions related to this RFP that are submitted to this email address. Answers may be delivered via subsequent addendums and/or posted to the college purchasing website. However, inquiries seeking information that is already posted on the College website will not be answered.
- To promote sustainability and a fair Proposal process, CMC utilizes Rocky Mountain BidNet to generate awareness and collect responses. **Therefore, <http://www.govbids.com/scripts/CO1/public/home1.asp> will serve as the ONLY way to submit a qualified Proposal for this project.** Proposers must have an existing Rocky Mountain BidNet account or may establish one (currently) free of charge. Please be sure to allow time for technical difficulties in submitting responses. CMC will only consider submittals that have been placed successfully with BidNet **PRIOR TO CLOSING**, there are no exceptions to this. Proposers may contact Rocky Mountain BidNet staff directly or the Buyer via email if you are experiencing difficulty. The Buyer also encourages feedback on your BidNet experience. Please note that the CMC Purchasing website will contain all information related to this project. Updates and other information may or may not be posted to BidNet, The CMC Purchasing website listed above is the official venue for information.
- Proposing firms must submit the following, on-time and completely, for their Proposal to be considered by the Selection Committee:
  - Statement of Qualifications, including firm name, address, years in business, description of customer service capabilities, description of online capabilities, confirmation of debit card availability, ACH capability, etc. You are welcome to submit marketing materials and other description of your services.
  - Signature Block (the last page of this document)
  - Price per participant
  - Any other relevant fees or costs associated with the set up or administration of the plan
  - Minimum of five professional references of similarly situated clients

**A CMC Selection Committee is not able to consider responses that are not compliant with this provision. If your Proposal is missing one or more of the items listed above your Proposal will not be considered.**

- No bid bond is required for this project.
- **Please do not contact any member of CMC's staff, faculty or Selection Committee directly regarding this proposal. Any attempt to do so will result in your firm's disqualification at the discretion of the Purchasing Manager.**

#### **IV. SELECTION CRITERIA**

Our Selection Committee for this project will evaluate submittals to identify the best value for the College. This will not be an “all-or-none” award. The Selection Committee may also, at its discretion, give preference to firms that are able to service many or all of our campuses and administrative locations.

Specifically, the selection committee will select the winning proposer based on the following criteria in no order of importance:

- A. Quality of submittal
- B. Company experience, including previous experience with the College if applicable
- C. Pricing
- D. References
- E. Customer service capabilities, including hours of operation and methods of delivery
- F. Ease of use for participants, including web presence, debit card availability, ACH options, etc.

*Criteria may be modified in subsequent Addendums.*

#### **V. TERMS & CONDITIONS**

- A. *Submittal Instructions:* All submittals must adhere to the instructions provided above to be considered by the Selection Committee.
- B. *Copies:* No electronic or paper copies of submittals are required other than your post to BidNet.
- C. *Proprietary Information:* If you are submitting any information you consider proprietary, please clearly mark it “Proprietary Information.” If the Purchasing Manager concurs, this information will not be considered public information. At the discretion of the Purchasing Manager, submittal information may be posted to the College Purchasing website upon award. Please do not submit anything that you do not want posted publicly without clear indication to our Purchasing Department. Notwithstanding the prior statement, the Purchasing Manager may make your entire submittal public information at his or her discretion.
- D. *Signature Block:* All proposals must be signed by an authorized agent of your firm. Any firm or individual submitting a signed proposal shall be deemed to have read and understood all the terms, conditions, and requirements of this Request for Proposal.
- E. *Refusal:* CMC reserves the right to refuse any and/or all proposals, or any part thereof.
- F. *Withdraw Proposal:* You may withdraw your proposal at any time prior to the date and time set for closing.
- G. *Discussions/Negotiations:* CMC reserves the right to conduct discussions with Proposers, to accept or not accept revisions of Proposals, and to negotiate price changes and other terms at the sole discretion of the Purchasing Manager. During this discussion period, CMC will not disclose any information regarding Proposal submittals other than (in some cases) the number of qualified proposals the College received and the name of the Proposer.
- H. *Award:* Awards shall be made to all responsible proposers whose submittals are determined to be advantageous to CMC based on the evaluation factors described above. Price, although a consideration, will not be the sole determining factor. CMC reserves the right to ask for the “Best and Final Offer” from any or all Proposers.

- I. *Pre-award Presentations:* The College reserves the right to require presentations from the highest-ranking proposers, in which they may be asked to provide additional information and answer questions from the Selection Committee.
- J. *Contract:* The successful proposer is expected to enter into a standard contract with Colorado Mountain College that will include the College's standard terms and conditions attached to all purchase orders.
- K. *Indemnification:* Successful Proposers shall indemnify and save CMC harmless, to the extent permitted by law, from any and all claims, demands, suits, and actions which may arise from errors or omissions caused by the Proposer in conjunction with its contractual obligations including, but not limited to, obligations for the preparation of any and all documents required by CMC in conjunction therewith, and shall defend all suits, in the name of CMC when applicable, and shall pay all costs and judgments which may issue thereon.
- L. *Insurance:* Successful Proposers shall have their insurance company send the CMC Purchasing Department a currently in-force Certificate of Insurance which indicates that insurance coverage has been obtained, including professional liability, which meets the minimum requirements as are required by Colorado law for work performed by the Proposer. "Colorado Mountain College" shall be named as an additional insured. The Proposer shall be responsible for notifying the CMC Purchasing Department of any modification to, or cancellation of, these policies during the contractual period; including, but not limited to, any pending or paid claims against the aggregate amount of the policy.
- M. *Illegal Aliens:* By submitting a proposal, a Proposer certifies pursuant to C.R.S. § 8-17.5-102(1) that, at the time of proposal submission, it does not knowingly employ or contract with an illegal alien and that the contractor has participated or attempted to participate in the Basic Pilot Program that is administered by the United States Department of Homeland Security in order to verify that it does not employ any illegal aliens.
- N. *Limitation of Multiple-Fiscal Year Obligations:* All financial obligations of Colorado Mountain College (CMC) under this contract subsequent to the fiscal year in which signed are contingent upon funds for this purpose being appropriated, budgeted, and otherwise made available by the CMC Board of Trustees. This contract shall not be deemed to create any multiple-fiscal year direct or indirect debt or other financial obligation whatsoever for purposes of Section 20(4) (b) of the State Constitution (Amendment 1).

**VI. SIGNATURE BLOCK**

*Note: Please return this page with your proposal.*

The undersigned, an authorized agent of his/her company, hereby certifies:

- ( ) the receipt of \_\_\_\_\_ addendums,
- ( ) familiarization with all terms, conditions, and specifications herein stated,
- ( ) vendor is qualified to perform work and services as proposal,
- ( ) that the proposal is valid until \_\_\_\_\_ (date).

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Mailing Address

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
City, State, Zip Code

\_\_\_\_\_  
Title

\_\_\_\_\_  
Federal Employer ID Number

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Type of Entity (S-Corp, LLC, etc?)

\_\_\_\_\_  
Official EMAIL Address

\_\_\_\_\_  
Web Site, if available

\_\_\_\_\_  
Solicitation Number (from cover page)