



REQUEST FOR EXPRESSIONS OF INTEREST AND STATEMENTS OF QUALIFICATIONS

Title: **Group Benefits Insurance and Administration Services**

Reference No.: **1220-050-2020-001**

FOR PROFESSIONAL SERVICES

(General Services)
Issue Date: December 11, 2019

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REQUEST FOR EXPRESSIONS OF INTEREST AND STATEMENTS OF QUALIFICATIONS
PRE-QUALIFICATION OF GROUP BENEFITS INSURANCE AND ADMINISTRATION
SERVICES

1. INTRODUCTION

1.1 Purpose

The purpose of this request for expressions of interest / statements of qualifications (the “RFEOI/SOQ”) is to:

- (a) invite submissions (the “Submission”) from respondents (the “Respondent”) that describe the desire, relevant expertise, capability, reputation and resources of the Respondent to undertake the project as generally set out in Schedule A – Scope of Services; and
- (b) to select a Respondent or Respondents who may be invited to participate in the next stage of the competitive selection process, when called.

This RFEOI/SOQ is not a solicitation of proposals; rather it is a non-binding invitation to qualified Respondents to make themselves known to the City by providing information and by demonstrating to the City their desire, relevant experience, qualifications, capability, reputation and available resources.

All interested parties should respond to this RFEOI/SOQ as the City does not guarantee that a more formal procurement process (as determined at the City’s discretion) will be issued following this RFEOI/SOQ and may elect to directly negotiate with one or more interested parties, or the City may at any time and at its sole discretion decide to cancel this process for any reason.

1.2 Definitions

In this RFEOI/SOQ the following definitions shall apply:

“**BC Bid Website**” means www.bcbid.gov.bc.ca;

“**City**” means the City of Surrey;

“**City Representative**” has the meaning set out in section 2.3;

“**City Website**” means www.surrey.ca;

“**Date**” has the meaning set out in section 2.2;

“**Evaluation Team**” means the team appointed by the City;

“**Preferred Respondent(s)**” means the Respondent(s) selected by the Evaluation Team;

“Respondent” means an entity that submits a Submission;

“RFEOI/SOQ” means this Request for Expressions of Interest and Statements of Qualifications;

“Services” has the meaning set out in Schedule A; and

“Submission” means a submission submitted in response to this RFEOI/SOQ.

2. INSTRUCTIONS TO RESPONDENTS

2.1 Address for Submission Delivery

A Submission should be labelled with the Respondent’s name, RFEOI/SOQ title and number. A Submission should be submitted in the form as described in Section 3.2 – Form of Submission.

The Respondent may submit a Submission either by email or in a hard copy, as follows:

(a) E-mail

If the Respondent chooses to submit by email, the Respondent should submit the Submission electronically in a single pdf file which must be delivered to the City by email at: purchasing@surrey.ca

PDF emailed Submissions are preferred and the City will confirm receipt of emails. Note that the maximum file size the City can receive is 10Mb. If sending large email attachments, Respondents should phone [604-590-7274] to confirm receipt. A Respondent bears all risk that the City’s computer equipment functions properly so that the City receives the Submission.

(b) Hard Copy

If the Respondent chooses NOT to submit by email, the Respondent should submit one (1) original unbound Submission and one (1) copy two (2) in total) which must be delivered to the City at the office of:

Name: Richard D. Oppelt, Manager, Procurement Services
at the following location:

Address: Surrey City Hall
Finance Department – Procurement Services Section
Reception Counter, 5th Floor West
13450 – 104 Avenue, Surrey, B.C., Canada V3T 1V8

2.2 Date

The City would prefer to receive Submissions on or before **January 16, 2020**. The City's office hours are 8:30 am to 4:00 pm, except holidays.

2.3 Inquiries

All inquiries related to this RFEOI/SOQ should be directed, by email, to the person named below (the "**City Representative**"). Information obtained from any person or source other than the City Representative may not be relied upon.

Name: Richard D. Oppelt, Manager, Procurement Services
Email: purchasing@surrey.ca

Reference: #1220-050-2020-001

Inquiries should be made no later than seven (7) business days before the closing Date. The City reserves the right not to respond to inquiries made within seven (7) business days of the closing Date. Inquiries and responses will be recorded and may be distributed to all Respondents at the discretion of the City.

Respondents finding discrepancies or omissions in the RFEOI/SOQ documentation or having doubts as to the meaning or intent of any provision should immediately notify the City Representative. If the City determines that an amendment is required to this RFEOI/SOQ, the City Representative will issue an addendum in accordance with section 2.4. No oral conversation will affect or modify the terms of this RFEOI/SOQ nor be relied upon by any Respondent.

2.4 Addenda

If the City determines that an amendment is required to this RFEOI/SOQ, the City Representative will issue a written addendum by posting it on the BC Bid Website at www.bcbid.gov.bc.ca (the "BC Bid Website") and the City Website at www.surrey.ca (the "City Website") that will form part of this RFEOI/SOQ. No amendment of any kind to the RFEOI/SOQ is effective unless it is posted in a formal written addendum on the City Website. Upon submitting a Submission, Respondents will be deemed to have received notice of all addenda that are posted on the City Website.

2.5 Status Inquiries

All inquiries related to the status of this RFEOI/SOQ, including whether or not a Respondent has been selected, should be directed to the City Website and not to the City Representative.

3. SUBMISSION FORM AND CONTENTS

3.1 Package (Hard Copy)

If the Respondent chooses NOT to submit by email, the Respondent should submit a Submission in a particular submittal format, to reduce paper, encourage our recycled product expectations, and reduce package bulk. Bulk from binders and large packages are unwanted. Vinyl plastic products are unwanted. The City also has an environmentally-preferable purchasing commitment and seeks a package format to support the green expectations and initiatives of the City.

Please do not use any plastic or vinyl binders or folders. The City prefers simple, stapled paper copies. If a binder or folder is essential due to the size of your Submission, they should be fully 100% recycled stock.

The City seeks and prefers submittals on 100% Post Consumer Fibre (PCF) paper, consistent with the City's policy and the City environmental practices.

Please double-side your Submission.

Submissions should be in a sealed envelope/package, marked on the outside with the Respondent's name, title of the Submission and reference number.

3.2 Form of Submission

Respondents should provide the following. Respondents are encouraged to respond to the items listed below in the order listed:

(a) Respondent's Experience, Reputation and Resources

- (i) Provide a brief description of the Respondent's current business inclusive of:
 - full legal name and contact information including office address, telephone, fax and website address;
 - name, address, business telephone number, business email address and business fax number of the Respondent's designated contact person; and
 - company background, structure and ownership details.
- (ii) Respondent's relevant experience and qualifications in delivering Services similar to those required by this RFEOI/SOQ. In particular, the Respondent's experience in delivering benefits within the public and municipal sector;
- (iii) Respondent's demonstrated ability to provide the Services;

- (iv) Respondent's references (name and telephone number). The City's preference is to have a minimum of three references;
- (v) Respondents should describe any difficulties or challenges you might anticipate in providing Services to the City and how you would plan to manage these;
- (vi) Respondents should provide information on the background and experience of all key personnel proposed to undertake the Services; and
- (vii) Respondents should provide information on the background and experience of all sub-contractors proposed to undertake a portion of the Services. This includes any third parties that are engaged to deliver any wellness initiatives, adjudication services, or cost savings mechanisms.

(b) Respondent's Technical Response (Services)

- (i) a narrative that illustrates an understanding of the City's requirements and Services;
- (ii) a description of the general approach and methodology that the Respondent would take in performing the Services including specifications and requirements;
- (iii) a narrative that illustrates how the Respondent will complete the scope of Services, manage the Services, and accomplish required objectives within the City's schedule; and
- (iv) a narrative that illustrates the implementation process and resources dedicated to the City to facilitate any transition of benefits coverage.

3.3 Signature

The Submission should be signed by a person authorized to sign on behalf of the Respondent and include the following:

- (a) If the Respondent is a corporation then the full name of the corporation should be included, together with the names of authorized signatories. The Submission should be executed by all of the authorized signatories or by one or more of them provided that a copy of the corporate resolution authorizing those persons to execute the Submission on behalf of the corporation is submitted;
- (b) If the Respondent is a partnership or joint venture then the name of the partnership or joint venture and the name of each partner or joint venturer should be included, and each partner or joint venturer should sign personally (or, if one

or more person(s) have signing authority for the partnership or joint venture, the partnership or joint venture should provide evidence to the satisfaction of the City that the person(s) signing have signing authority for the partnership or joint venture). If a partner or joint venturer is a corporation then such corporation should sign as indicated in subsection (a) above; or

- (c) If the Respondent is an individual, including a sole proprietorship, the name of the individual should be included.

4. EVALUATION AND SELECTION

4.1 Evaluation Team

The evaluation of Submissions will be undertaken on behalf of the City by an Evaluation Team. The Evaluation Team may consult with others including City staff members, third party consultants and references, as the Evaluation Team may in its discretion decide is required. The Evaluation Team will give a written recommendation for the selection of a Preferred Respondent or Preferred Respondents to the City.

4.2 Evaluation Criteria

The Evaluation Team will compare and evaluate all Submissions to determine the Respondent's strength and ability to provide the Services to the City in order to determine the Submission(s) is most advantageous to the City, using the following criteria:

(a) Experience, Reputation and Resources:

The Evaluation Team will consider the Respondent's responses to items in Section 3.2(a) – Form of Submission; and

(b) Technical (Services)

The Evaluation Team will consider the Respondent's responses to items in Section 3.2(b) – Form of Submission.

The Evaluation Team will not be limited to the criteria referred to above, and the Evaluation Team may consider other criteria that the team identifies as relevant during the evaluation process. The Evaluation Team may apply the evaluation criteria on a comparative basis, evaluating the Submissions by comparing one Respondent's Submission to another Respondent's Submission. All criteria considered will be applied evenly and fairly to all Submissions.

The City currently anticipates that it may carry out a more formal procurement process for release to multiple qualified Respondents.

4.3 Litigation

In addition to any other provision of this RFEOI/SOQ, the City may, in its absolute discretion, reject a Submission if the Respondent, or any officer or director of the Respondent submitting the Submission, is or has been engaged directly or indirectly in a legal action against the City, its elected or appointed officers, representatives or employees in relation to any matter, or if the City has initiated legal action against any officers or directors of the Respondent.

In determining whether or not to reject a Submission under this section, the City will consider whether the litigation is likely to affect the Respondent's ability to work with the City, its consultants and representatives and whether the City's experience with the Respondent indicates that there is a risk the City will incur increased staff and legal costs in the administration of an agreement if it is awarded to the Respondent.

4.4 Additional Information

The Evaluation Team may, at its discretion, request clarifications or additional information from a Respondent with respect to any RFEOI/SOQ, and the Evaluation Team may make such requests to only selected Respondents. The Evaluation Team may consider such clarifications or additional information in evaluating a Submission.

4.5 Interviews

The Evaluation Team may, at its discretion, invite some of all of the Respondents to appear before the Evaluation Team to provide clarifications of their Submissions. In such event, the Evaluation Team will be entitled to consider the answers received in evaluating Submissions.

5. GENERAL CONDITIONS

5.1 No City Obligation

This RFEOI/SOQ is not a tender and does not commit the City in any way to select a Preferred Respondent(s), or to proceed to negotiations for an agreement, or to award any agreement, and the City reserves the complete right to at any time reject all Submissions, and to terminate this RFEOI/SOQ process.

5.2 Respondent's Expenses

Respondents are solely responsible for their own expenses in preparing, and submitting a Submission, and for any meetings, negotiations or discussions with the City or its representatives and consultants, relating to or arising from this RFEOI/SOQ. The City and its representatives, agents, consultants and advisors will not be liable to any Respondent for any claims, whether for costs, expenses, losses or damages, or loss of

anticipated profits, or for any other matter whatsoever, incurred by the Respondent in preparing and submitting a Submission, or participating in subsequent proposal requests, negotiations for an agreement, or other activity related to or arising out of this RFEOI/SOQ.

5.3 No Contract

By submitting a Submission and participating in the process as outlined in this RFEOI/SOQ, Respondents expressly agree that no contract of any kind is formed under, or arises from this RFEOI/SOQ, prior to the signing of a formal written Contract.

5.4 Conflict of Interest

A Respondent shall disclose in its Submission any actual or potential conflicts of interest and existing business relationships it may have with the City, its elected or appointed officials or employees. The City may rely on such disclosure.

5.5 Solicitation of Council Members and City Staff

Respondents and their agents will not contact any member of the City Council or City staff with respect to this RFEOI/SOQ, other than the City Representative named in section 2.3, at any time prior to the award of an agreement or the cancellation of this RFEOI/SOQ.

5.6 Confidentiality

All Submissions become the property of the City and will not be returned to the Respondent. All Submissions will be held in confidence by the City unless otherwise required by law. Respondents should be aware the City is a "public body" defined by and subject to the *Freedom of Information and Protection of Privacy Act* of British Columbia.

6. CITY DISCLAIMER

- a. The information in this RFEOI/SOQ and any further supporting documentation is provided for reference purposes only. It is the responsibility of interested parties to confirm the accuracy and applicability of this information. All costs related to updating or acquiring additional information shall be born solely by the Respondent. The information contained in this RFEOI/SOQ has been prepared, in part, on information provided by others, and such information is believed to be accurate and reliable. However, by its receipt of this RFEOI/SOQ, each Respondent remises, releases, and forever discharges the City and its representatives (including staff and consultants and other professional advisors) from any and all claims which such person has, have, or may hereafter have arising out of any information contained herein. Any party who intends to submit a response to this RFEOI/SOQ is specifically invited to independently verify the accuracy of the information contained herein.

- b. The City shall not be obligated to review or accept any Submission and may reject any or all Submissions without giving reasons therefore.
- c. All negotiations and discussions with Respondents are on a “without prejudice” basis and cannot be construed as an agreement, and/or otherwise unless expressly approved by City Council and a written agreement is signed by the City.
- d. The City may negotiate with any one or more of the Respondents without having any duty or obligation to advise or allow any other Respondents to vary their Submission or otherwise negotiate with the City.
- e. The City may enter into discussions to clarify issues related to any Submission. If at any time the City reasonably forms the opinion that a mutually acceptable agreement is not likely to be reached, the City may give notice terminating discussions, but is under no obligation to do so.
- f. The City does not authorize any other person or agency to represent the project on its behalf without the prior written approval of the City.
- g. By submitting a Submission and participating in the process as outlined in this RFEOI/SOQ, Proponents expressly agree that no contract of any kind is formed under, or arises from, this RFEOI/SOQ process.

7. DISCLAIMER

Notwithstanding anything contained herein, the Respondent agrees that he shall take all necessary steps to confirm the accuracy of this RFEOI/SOQ and agrees that the City shall have no liability whatsoever in respect of any losses or damages of any kind howsoever arising in relation to this RFEOI/SOQ.

SCHEDULE A SCOPE OF SERVICES

Project Title: Group Benefits Insurance and Administration Services

Project Reference No.: 1220-050-2020-001

1. OVERVIEW

The City of Surrey is a rapidly growing and diverse community located in the Province of British Columbia. It is the 12th largest city in Canada and the second largest in BC. Surrey is home to almost half a million residents and 16,000 businesses within its six town centres of Fleetwood, Surrey City Centre, Guildford, Newton, Cloverdale, and South Surrey.

The City is seeking an experienced service provider(s) to insure and administer (i.e., claims adjudication services) the group benefits plan for the City's over 2,200 employees. Employee benefits programs are offered to all eligible Surrey Public Library, Surrey Firefighters and City of Surrey employees, their spouses and dependents. This includes full-time, part-time, and term employees. Benefits vary between employee groups.

Plan provisions, claims data, and census information will not be made available with this RFEOI/SOQ, but will be released with any subsequent competitive solicitation document to pre-qualified Respondents. As such, Respondents are not required to provide any pricing information within the Submission.

The group benefits included in the program are as follows:

Benefit	Current Provider	Funding Arrangement
a. Extended health	Manulife Financial	ASO with stop loss pooling
b. Dental	Manulife Financial	ASO
c. Basic life insurance	Manulife Financial	Non-refund
d. Optional life insurance	Manulife Financial	Non-refund
e. Dependent life insurance	Manulife Financial	Non-refund
f. Survivor income benefit (closed plan)	Manulife Financial	Non-refund
g. Long term disability	Manulife Financial	Non-refund
h. Basic AD&D	AIG	Non-refund
i. Voluntary AD&D	AIG	Non-refund
j. Business travel accident	AIG	Non-refund
k. Volunteer firefighter coverage	AIG	Non-refund
l. Out of country medical	AIG	Non-refund

Short term disability benefits are offered to employees and administered by the City. The Respondent may be engaged to deliver short term disability support to employees after a certain duration of disability (e.g., after four weeks of short term disability).

2. SCOPE OF SERVICES

The group insurance provider must be able to insure and administer the benefits noted above within the constraints of the funding arrangements noted. This includes the following minimum requirements:

- a. Maintain a call centre and online resources for employees to access for information and questions related to the plan provisions, claims, and eligibility
- b. Prepare plan contracts, booklets, financial agreements, and other plan documentation
- c. Allow for electronic file feeds from the City to enrol eligible employees
- d. Dedicated account management team, including disability case managers
- e. Online reporting capabilities for premium and claims information
- f. Provide financial reporting on the performance of all benefits (quarterly)
- g. Facilitate meetings to review open and pending long term disability claims (quarterly)

Please note that this RFEOI/SOQ is for an insurance provider, and the City is not seeking responses for plan advisors, brokers, consultants, or third party benefits administrators.

The City will consider responses that do include all benefits noted. The Respondent should indicate which benefits its firm would propose to deliver.

3. RESPONDENT'S PREFERRED QUALIFICATIONS

3.1 Respondents should have the following experiences within the past five years:

- a. Experience in the municipal and/or public sector;
- b. Experience in delivering benefits to unionized staff with collectively bargained provisions
- c. Experience in delivering benefits to plan sponsors with multiple employee groups with varying plan provisions; and
- d. Experience in long term disability case management.

3.2 In addition to the above, the Respondent should demonstrate the following:

- a. Innovative solutions to contain or reduce plan costs;
- b. Technology available to employees to submit claims, access information, etc.; and
- c. Health & wellness resources available