



Request for Proposal (RFP) # 24-11

for

Health and Dental Consultant Services

Issue Date: January 29, 2024

Proposal Due Date and Hour: February 27, 2024 3:00 p.m.

Last Day for written questions: February 8, 2024

Montgomery County Purchasing Department  
755 Roanoke Street, Suite 2C  
Christiansburg, VA 24073-3179

On behalf of

Montgomery County and Montgomery County Public Schools

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Health and Dental Consultant Services

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**COUNTY OF MONTGOMERY, VIRGINIA**  
**RFP # 24-11**

**ISSUE DATE: JANUARY 29, 2024**  
**Health and Dental Consultant Services**

(TO BE COMPLETED AND RETURNED)  
**GENERAL INFORMATION FORM**

**QUESTIONS:** All inquiries for information regarding this solicitation should be directed to: Jeff Groseclose, CPPB, VCO, VCA, Procurement Manager, Phone: (540) 382-5784; faxed to (540) 382-5783, or e-mail: [mcpurchasing@montgomerycountyva.gov](mailto:mcpurchasing@montgomerycountyva.gov).

**DUE DATE:** Sealed Proposals will be received until **February 27, 2024** up to and including **3:00PM**. Failure to submit proposals to the correct location by the designated date and hour will result in disqualification.

**ADDRESS:** Proposals should be mailed or hand delivered to: **Montgomery County Purchasing Department, 755 Roanoke Street, Suite 2C, Christiansburg, Virginia 24073-3179**. Reference the Due Date and Hour, and RFP number in the lower left corner of the return envelope or package.

**COMPANY INFORMATION/SIGNATURE:** In compliance with this Request for Proposal and to all conditions imposed herein and hereby incorporated by reference, the undersigned offers and agrees to furnish the services and goods in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

Full Legal Name (print)		Federal Taxpayer Number (ID#)	Contractor's Registration N/A
Business Name / DBA Name / TA Name and Address		Payment Address	Purchase Order Address
Contact Name/Title		Signature (ink)	Date
Telephone Number	Fax Number	Toll Free Number	E-mail Address

**COUNTY OF MONTGOMERY**  
**RFP# 24-11**  
Health and Dental Consultant Services

**I. PURPOSE:** The intent and purpose of this Request for Proposal (RFP) is to establish one or more contracts through competitive negotiation for Health and Dental Consultant Services for the County of Montgomery County, Virginia (herein after referred to as “County”) and Montgomery County Public Schools (herein after referred to as “MCPS” or “Schools”). This is a joint procurement effort between the County and the Schools. The County and MCPS reserve the right to enter in to the same contract or to award separate contracts.

**II. BACKGROUND:**

**A. General Background**

Montgomery County is located in the southwestern part of Virginia in the region known as the New River Valley. This region takes its name from the New River, the nation's oldest and the world's second oldest river, and includes the counties of Floyd, Giles, Montgomery, Pulaski, and the City of Radford. The County has a land area of 393 square miles and lies in the broad picturesque area between the Appalachian Plateau and the Blue Ridge Mountains. Topography varies from gently rolling to steep mountainous terrain, with elevations varying from 1,300 to 3,700 feet above sea level. The majority of the County is at an elevation of 2,000 feet.

Today the Towns of [Blacksburg](#) and [Christiansburg](#), the County seat, are the population centers of the County and are located approximately 35 miles southwest of the City of Roanoke. Blacksburg is home to [Virginia Polytechnic Institute and State University](#) (Virginia Tech). Founded in 1872 as a land-grant college, Virginia Tech is the largest university in Virginia and one of the country's leading research institutions. The County had a 2020 population of 100,839. (This includes two incorporated towns, Blacksburg and Christiansburg, with a combined population of approximately 67,365.)

The County is governed by an elected seven member Board of Supervisors who appoints a County Administrator.

**B. Specific Background**

For health insurance, the County and the Schools have a combined, self-insured program. The County and the Schools maintain separate dental coverage and pharmacy benefit managers.

For the protection of the school division's students, employees and properties, MCPS maintains various insurance policies managed by contract providers. Some of the major insurance coverage provided to MCPS includes Employee Health Insurance, Workers Compensation, General Liability, Property Insurance, School Board Legal Liability, Environmental Liability, Umbrella Liability, and Vehicle Insurance Pool. The County maintains similar insurance coverage.

### **III. STATEMENT OF NEED:**

The Consultant shall furnish all labor and resources to perform all tasks in accordance with generally accepted professional standards and shall provide the County and the Schools with the best possible advice and consultation within the consultant's authority and capacity as a professional consultant. The scope of the work shall include, but not be limited to, the following:

#### **A. Health and Dental Benefits**

1. **Planning Meetings:** Meetings conducted each year to review the current state of the health and welfare benefit programs and to determine objectives for the upcoming year. The consultant may be working directly with Finance, Human Resources, County and School Executives, Board members, and others as deemed necessary.
2. **Annual Renewal Services:** For health and welfare plans, and specific stop loss contracts, the Consultant will evaluate proposed renewal actions of all carriers and negotiate on behalf of the County and the Schools using internal projection analyses to obtain the most favorable terms. Consultant will also analyze the medical plans by rate tier and recommend alternative contribution approaches.
3. **Plan Design/Funding:** Annually, Consultant will present alternative plan considerations and associated costs based on the identified objectives. Additionally, any alternative funding or cash flow arrangements that may benefit the County and the Schools will be evaluated and reported.
4. **Miscellaneous Consulting Assistance:** Consultant will have periodic communications and on-site meetings relative to the programs to encourage and maintain awareness level of all parties. Additional services may include:
  - a. Evaluate and review existing plans
  - b. Review contracts to evaluate liability exposure of the County and MCPS
  - c. Work with the plan administrator to ensure the continued provision of high quality benefit plan designs and efficient administration of the programs
  - d. Review and analyze funding statements, and claims if requested
  - e. Assist in the development and preparation of solicitation specifications for health and welfare plans and stop loss contracts as necessary
  - f. Provide assistance to the County and MCPS in the RFP process by:
    - Preparing meeting requirements
    - Meeting County and MCPS staff and attending pre-solicitation conferences
    - Offer presentations/negotiations
    - Analyzing bids/quotes/proposals
    - Developing recommendations on the best bid/quote/proposal provided

- Prepare detailed summation of the RFP process used to document the procurement file
- g. Assist County and/or MCPS staff in finalizing/refining administrative details for risk management and employee optional benefits
- h. Prepare cost/benefit analyses for County and MCPS review
- i. Provide recommendations for the most adequate and cost effective programs
- j. Produce periodic and ad hoc reports for benefit plans as required
- k. Assist in coordination of plan implementation and employee education regarding benefit programs
- l. Update the County and the Schools on legal and regulatory issues affecting benefit programs
- m. Review and analyze the impact of tax and legislative/regulatory changes on benefit plans
- n. Advise and recommend changes based on impact of regulations and significant benefit market trends
- o. Assess the competitiveness of health and welfare plans (to include public sector)
- p. Analyze benefit plans effectiveness in supporting the total compensation strategy and recommend changes to meet strategy
- q. Provide ongoing monitoring, evaluation and review of benefit programs throughout the year and provide recommendations as necessary
- q. Present and/or attend Board meetings for benefit programs
- r. Represent County and MCPS, and mediate with Third Party Administration (TPA) or vendors regarding performance issues, resolution of claims issues.
- s. Ensures compliance of Third Party Administration or other contract issues.

**D. EXCEPTIONS:** Any and all deviations from, or exceptions to, the Statement of Need and other requirements contained herein must be listed and prominently displayed in proposal materials, and should be clearly stated by the offeror in a separate section titled “Exceptions”.

#### **IV. PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS:**

##### **A. GENERAL REQUIREMENTS:**

1. **RFP Response:** In order to be considered for selection, Offerors must submit a complete response to this RFP to include:
  - a. **One (1) original and nine (9) paper copies of the entire proposal INCLUSIVE OF ALL ATTACHMENTS.** Any proprietary information should be clearly marked.
  - b. **One (1) electronic copy** in WORD format or searchable PDF (USB/Flash Drive) of the entire proposal as one document, **INCLUSIVE OF ALL ATTACHMENTS** mailed along with the hard copy above. Any proprietary information should be clearly marked.
  - c. Should the proposal contain **proprietary information**, provide **one (1) redacted** electronic copy in WORD format or searchable PDF (USB/Flash Drive) of the entire

document **INCLUSIVE OF ALL ATTACHMENTS**. All identified proprietary information should be blacked out. This USB/Flash Drive should be marked "*Redacted Copy*".

d. Response shall be submitted to:

Jeff Groseclose, CPPB, Procurement Manager  
Montgomery County Purchasing Department  
755 Roanoke Street, Suite 2C  
Christiansburg, VA 24073

Identify on outside of envelope: **Sealed RFP # 24-11**

RFP Due date date and hour: **February 27, 2024, 3:00 P.M.**

The Offeror shall make no other distribution of the proposal.

2. Proposal Preparations:

- a. Proposal shall be signed by an authorized representative of the Offeror. All information requested should be submitted. The Procurement Manger will review all proposals to ensure required information is included. Failure to submit all information requested may result in a request to submit the missing information. Proposals which are substantially incomplete or lack key information may be rejected as incomplete. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.
- b. Proposals will be reviewed and evaluated by a Committee as designated by the County.
- c. Proposal should be prepared simply and economically, providing a straight forward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.
- d. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, subletter, and repeat the text of the requirements as it appears in the RFP. If a response covers more than one page. the proposal should contain a table of contents which cross references the RFP requirements. Information which the offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at an appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.
- e. Each copy of the proposal should be bound or contained in a single volume where

practical. All documentation submitted with the proposal should be contained in that single volume.

- f. Ownership of all data, materials and documentation originated and prepared for the County pursuant to the RFP shall belong exclusively to the County and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the Offeror must invoke the protections of Section 2.2-4342D of the Code of Virginia, in writing, either before or at the time the data or other materials to be protected and state the reasons why protection is necessary. The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line item prices and/or total proposal prices as proprietary or trade secrets is not acceptable and will result in rejection of the proposal.
- B. SPECIFIC REQUIREMENTS:** Proposals should be as thorough and as detailed as possible so that the County may properly evaluate your capabilities to provide the required services. Offerors are required to submit the following information/items as a complete proposal:
1. The return of the RFP general information form and addenda, if any, signed and completed as required.
  2. Methodology/Specific Plan. Please provide a description of methodology of the offerors design and management processes incorporating an understanding of the goals and criteria of this project and how the offeror intends to meet those goals and criteria. Provide a specific plan for providing the services including what, when and how the service will be performed.
  3. Experience
    - Describe experience in providing services described
    - Describe your staffing including names, qualifications, degrees, certifications, experience and licenses of key employees, consultants, and sub-consultants assigned to the project.
    - Resumes of staff
    - References- provide at least three for which work of a similar nature was performed in the last three years. Provide a name, telephone number and email address for the person of the owner's team most likely to respond to our reference request.
  4. Proposed price: Offerors should submit a detailed price proposal for the County and MCPS combined. Proposals should also include two separate detailed price proposals, one for the County and one for MCPS, should the County and the Schools decide to award separate contracts. Price proposals should include any and all costs associated with providing the service and should include a summary of your ability to control costs.
  5. Provide any additional information that may be relevant to our decision to choose your firm.



**V. EVALUATION AND AWARD OF CONTRACT:**

**A. Award of Contract:** Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposal, including price, if so stated in the Request for proposal. Negotiations shall be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, Montgomery County shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. Montgomery County may cancel the Request for Proposal or reject proposals at any time prior to an award, and is not required to furnish a statement of the reason why a particular proposal was not deemed to be the most advantageous. (Section 2.2-4359D, Code of Virginia.) Should Montgomery County determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that offeror. Montgomery County reserves the right to award more than one contract. The award document will be a contract incorporating by reference all the requirements, terms, and conditions of the solicitation and the contractor’s proposal as negotiated. See Attachment B for sample contract form.

**B. Evaluation Criteria:** Proposals shall be evaluated by the County using the following criteria:

<u>EVALUATION CRITERIA</u>	<u>WEIGHT</u>
1. Method and plan for providing services	35
2. Qualifications and experience	25
3. Price and Fees	20
4. Proposed schedule for performing services indicating the ability to required deadlines	10
5. Strength of overall proposal. Specifically address the County’s RFP including the basic approach and understanding of the County’s objectives.	10

**VI. PREPROPOSAL CONFERENCE:** An optional pre-proposal conference will be held at **3:30 pm on Tuesday, February 6, 2024** at 755 Roanoke Street, Christiansburg, VA 24073 in Multipurpose Room #2 (MP2). The purpose of this conference is to allow potential Offerors an opportunity to present questions and obtain clarification relative to any facet of this solicitation. Potential offerors may also attend by teleconference.

Email [mcpurchasing@montgomerycountyva.gov](mailto:mcpurchasing@montgomerycountyva.gov) no later than **5:00 pm on February 5, 2024** to pre-register for the conference and to receive instructions for attending in person or by teleconference. If you do not pre-register by this deadline, there is no guarantee you will receive instructions prior to the meeting to attend via teleconference.

While attendance at this conference will not be a prerequisite to submitting a proposal, offerors who intend to submit a proposal are encouraged to attend. Bring/have a copy of this solicitation with you during the conference. Any changes resulting from this conference will be issued in a written addendum to this solicitation.

Potential offerors are encouraged to submit written questions before the conference so questions may be addressed during the meeting. Written questions must be submitted by email to Jeff Groseclose at [mcpurchasing@montgomerycountyva.gov](mailto:mcpurchasing@montgomerycountyva.gov) no later than close of business on February 8, 2024.

**VII. RESERVATION OF RIGHTS:** Montgomery County reserves the right to award in part or in whole, to one or more vendors, or to reject any or all proposals, whichever is deemed to be in its best interest.

**VIII. CONTRACT ADMINISTRATION:**

Lisa Rayne, Finance Director or her designee, shall be identified as the Contract Administrator for the County and shall use all powers under the contract to enforce its faithful performance. MCPS shall have a separate Contract Administrator, who will be identified at the time of award. The Contract Administrator, or their designee, shall determine the amount, quantity, acceptability, fitness of all aspects of the services and shall decide all other questions in connection with the services. The Contract Administrator, or their designee, shall not have the authority to approve changes in the services which alter the concept or which call for an extension of time for this contract. Any modifications made must be authorized by the Montgomery County Purchasing Department through a written amendment to the contract.

**IX. CONTRACT PERIOD:** The term of this contract is for one year or as negotiated. There will be an option for four (4) one year renewals or as negotiated.

ATTACHMENT A  
TERMS AND CONDITIONS

**GENERAL TERMS AND CONDITIONS:** [https://montgomerycountyva.gov/docs/default-source/purchasing-solicitations/rfp\\_terms\\_and\\_conditions.pdf?sfvrsn=ecfd231d\\_2](https://montgomerycountyva.gov/docs/default-source/purchasing-solicitations/rfp_terms_and_conditions.pdf?sfvrsn=ecfd231d_2)

**SPECIAL TERMS AND CONDITIONS**

1. **AUDIT:** The Contractor hereby agrees to retain all books, records, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. Montgomery County, its authorized agents, and/or State auditors shall have full access to and the right to examine any of said materials during said period.
2. **AUTHORIZED USERS:** Additional State agencies, institutions and/or other public bodies may be added or deleted to receive the goods or services resulting from this solicitation. The addition or deletion of authorized users shall be made only by written modification to the contract. Such modification shall name the specific agency added or deleted and the effective date.
3. **AVAILABILITY OF FUNDS:** It is understood and agreed between the parties herein that Montgomery County shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.
4. **CANCELLATION OF CONTRACT:** Montgomery County reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the Contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the Contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.
5. **IDENTIFICATION OF PROPOSAL ENVELOPE:** The signed proposal should be returned in a separate envelope or package, sealed and addressed as follows:  
Montgomery County  
Purchasing Department  
755 Roanoke Street, Suite 2C  
Christiansburg, VA 24073-3179  
Reference the opening date and hour, and RFP Number in the lower left corner of the envelope or package. If a proposal not contained in the special envelope is mailed, the Offeror takes the risk that the envelope, even if marked as described above, may be inadvertently opened and the information compromised which may cause the proposal to be disqualified. No other correspondence or other proposals should be placed in the envelope. Proposals may be hand delivered to the Montgomery County Purchasing Department.
6. **INDEPENDENT CONTRACTOR:** The contractor shall not be an employee of Montgomery County, but shall be an independent contractor. Nothing in this agreement shall be construed as authority for the contractor to make commitments which shall bind Montgomery County, or to otherwise act on behalf of Montgomery County, except as Montgomery County may expressly authorize in writing.

7. **INSURANCE:**

By signing and submitting a proposal under this solicitation, the Offeror certifies that if awarded the contract, it will have the following insurance coverages at the time the work commences. Additionally, it will maintain these during the entire term of the contract and that all insurance coverages will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

During the period of the contract, Montgomery County reserves the right to require the Contractor to furnish certificates of insurance for the coverage required.

INSURANCE COVERAGES AND LIMITS REQUIRED:

A. Worker's Compensation - Statutory requirements and benefits.

B. Employers Liability - \$100,000.00

C. General Liability - \$500,000.00 combined single limit. Montgomery County and the Commonwealth of Virginia shall be named as an additional insured with respect to goods/services being procured. This coverage is to include Premises/Operations Liability, Products and Completed Operations Coverage, Independent Contractor's Liability, Owner's and Contractor's Protective Liability and Personal Injury Liability.

D. Automobile Liability - \$500,000.00

The contractor agrees to be responsible for, indemnify, defend and hold harmless Montgomery County, its officers, agents and employees from the payment of all sums of money by reason of any claim against them arising out of any and all occurrences resulting in bodily or mental injury or property damage that may happen to occur in connection with and during the performance of the contract, including but not limited to claims under the Worker's Compensation Act. The contractor agrees that it will, at all times, after the completion of the work, be responsible for, indemnify, defend and hold harmless Montgomery County, its officers, agents and employees from all liabilities resulting from bodily or mental injury or property damage directly or indirectly arising out of the performance or nonperformance of the contract.

8. **MINORITY BUSINESS, WOMEN-OWNED BUSINESSES SUBCONTRACTING AND REPORTING:** Where it is practicable for any portion of the awarded contract to be subcontracted to other suppliers, the contractor is encouraged to offer such business to minority and/or women-owned businesses. Names of firms may be available from the buyer and/or from the Division of Purchases and Supply. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office the following information: name of firm, phone number, total dollar amount subcontracted and type of product/service provided.
9. **SEVERAL LIABILITY:** Montgomery County will be severally liable to the extent of its purchases made against any contract resulting from this solicitation. Applicable departments, institutions, agencies and Public Bodies of the Commonwealth of Virginia will be severally liable to the extent of their purchases made against any contract resulting from this solicitation.

**ATTACHMENT B  
COUNTY OF MONTGOMERY  
SAMPLE STANDARD CONTRACT**

**Contract Number:**

This contract entered into this \_\_\_ day of, 202\_\_, by \_\_\_\_\_ hereinafter called the “Contractor” and the County of Montgomery, called the “County”.

**WITNESSETH** that the Contractor and the County, in consideration of mutual covenants, promises and agreements herein contained, agree as follows:

**SCOPE OF SERVICES:** The Contractor shall provide the services to the County as set forth in the Contract Documents.

**CONTRACT PERIOD:** The initial contract period is \_\_\_\_\_ through \_\_\_\_\_.

**COMPENSATION AND METHOD OF PAYMENT:** Payment to the County shall be made in accordance with the Contract Documents.

**CONTRACT DOCUMENTS:** The Contract Documents shall consist of signed Contract, the statement of need, general terms and conditions, special terms and conditions, specifications, and other data contained in this Request For Proposal Number, dated \_\_\_\_\_, together with all written modifications thereof, the proposal submitted by the Contractor dated \_\_\_\_\_ and the Contractor’s letter dated \_\_\_\_\_, all of which contract documents are incorporated herein.

In **WITNESS WHEREOF**, the parties have caused this Contract to be duly executed intending to be bound thereby.

**CONTRACTOR:**

**COUNTY OF MONTGOMERY:**

By: \*\*Sample Document – Do not sign\*\* By: \_\_\_\_\_

Title: \_\_\_\_\_ Title: \_\_\_\_\_