



Finance and Administrative Services Department

HUMAN RESOURCES DIVISION

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October 27, 2017

TO: Brenda Billingsley, Director
Purchasing Division

FROM: Lisa Morrison, Project Manager
Human Resources Division – Employee Benefit Services

A handwritten signature in black ink that reads "Lisa C Morrison".

RE: **RFP R2114349P1, Group Prepaid Legal Insurance Services**

Mrs. Billingsley,

In preparation of RFP R2114349P1, Group Prepaid Legal Insurance Services, the Scope of Services included specific verbiage requesting vendors to, at a minimum, duplicate our current plan design:

The current, five year agreement with U.S. Legal Services, Inc. as described in the **Certificate of Coverage** will expire on December 31, 2017. The selected proposer shall, at a minimum, duplicate the current prepaid legal plan benefits. **Any enhancements must be identified in the enclosed Current Plan and Proposed Plan Design.**

The Plan Design Questionnaire provided in the RFP listed all of the covered services and benefit level (consultation, preparation and review of documents and representation) currently offered under our current Agreement for both in-network and out-of-network services for a fixed bi-weekly rate. Respondents were requested to complete the questionnaire indicating their in- and out-of-network benefit and any exclusions and limitations.

The responses to the Plan Design Questionnaire indicated that two proposers provide consultation, preparation and review of documents and representation and an out-of-network benefit for a fixed bi-weekly rate; one proposer indicated they provide consultation and review of documents for a fixed bi-weekly rate with no out-of-network coverage. Representation would be at an additional discounted rate paid by the member at time of service. Excerpt from Plan Design Questionnaire:

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Requested Coverage		Vendor Response
Benefit	Coverage Level	Preferred Legal Plan
Insurance Law Representation and consultation in disputes between Plan Member and Plan Member's insurance company regarding the non-payment of claims for losses incurred by the Plan Member under a policy of insurance issued to the Plan Member	No Charge, Fully Covered	Unlimited self-help guidance at no charge or panel attorney representation at discounted rate
Traffic Violations Representation for non-criminal moving traffic violations.	No Charge, Fully Covered	Unlimited self-help guidance at no charge or panel attorney representation at discounted rate
Estate Administration Assistance in administering your estate, including the applicable property transfers and court appearances.	No Charge, Fully Covered	Unlimited self-help guidance at no charge or panel attorney representation at discounted rate
Defense of Juveniles Defense of your eligible juvenile child in and relating to Juvenile Court Proceedings, where the underlying charge would not be considered a criminal felony charge if your child were being charged as an adult, and except traffic matters.	No Charge, Fully Covered	Unlimited self-help guidance at no charge or panel attorney representation at discounted rate
Criminal Violations Representation for all criminal misdemeanors, except first offense DUI, with representation available through trial in state courts.	No Charge, Fully Covered	Unlimited self-help guidance at no charge or panel attorney representation at discounted rate
Bankruptcy Chapter 7 Only. Coverage includes consultation, preparation of Petition and Schedules, attendance at 341 Meeting of Creditors, including representation at required hearing.	No Charge, Fully Covered	Unlimited self-help guidance at no charge or panel attorney representation at discounted rate
Naturalization Defined as advice, consultation, preparation and filing of applications for naturalization before the United States Bureau of Citizenship and Immigration Services.	No Charge, Fully Covered	Unlimited self-help guidance at no charge or panel attorney representation at discounted rate

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When preparing the Evaluation Criteria, I inadvertently omitted specific criteria for the Evaluation Committee to score the vendor's response based on our current plan design. (See attached a copy of the Evaluation Criteria which was included in RFP R2114349P1, Group Prepaid Legal Insurance Services.)

I am requesting termination of the solicitation, and that the RFP be revised and re-bid.

I will ensure all future Benefits procurements include plan specific criteria in the Evaluation Criteria section of the RFP.

Should you have questions or need further information, please do not hesitate to contact me.

/lcm

Evaluation Criteria

Group Prepaid Legal Insurance Services

The following list of Evaluation Criteria total 100 points. Subsequent pages will further detail and define the Evaluation Criteria which are summarized with their numerical point ranges. Be concise with your responses to each Evaluation Criteria. **(Maximum 2100 characters)**

If applicable, Vendors should list in its detailed response the title of any attached Supplemental Information. **Refer to Special Instruction to Vendor – Evaluation Criteria Response Form.**

**** Total points awarded for price will be determined by applying the following formula:
(Lowest Proposed Price/Proposer’s Price) x 20 = Price Score**

RFP Number and Title	R2114349P1 - Group Prepaid Legal Insurance Services
Vendor Name *Required	
Vendor Address *Required	
Evaluation Criteria	Vendor Response
<p>1. LOCATION - 5 POINTS Refer to Vendor’s Business Location Attestation Form and submit as instructed. Vendor with a principal place of business location (also known as the nerve center) within Broward County for the last six months, prior to the solicitation submittal, will receive five points; a Vendor not meeting all of the local business requirements will receive zero points. The following applies for a Vendor responding as a Joint Venture (JV): if a member of the JV has 51% or more of the equity and meets all of the local business requirements, the JV will receive three points; if a member of the JV has 30 to 50% of the equity and meets all of the local business requirements, the JV will receive two points; and if a member of the JV has 10% to 29% of the equity and meets all of the local business requirements, the JV will receive one point. Submit your firm’s State of Florida Department of Corporations website listing as evidence of your firm’s primary business location.</p>	
<p>2. COMPANY PROFILE, CHARACTERISTICS OF FIRM AND STAFFING - 25 POINTS 2a. Provide basic information for proposing company: i. Number of years in the Group Prepaid Legal Insurance Services business ii. Total number of current employees iii. Average seniority of current employees iv. Describe the company’s organization, philosophy, management. <u>5 Points</u></p>	

<p>2b. List Key Members of proposed Account Team who will provide professional, customer service and/or technical support services on this contract. Include:</p> <ul style="list-style-type: none">i. Name and contact information.ii. Job title and number of years of service with your organization and brief resume covering at least the last 5 years.iii. Location of the office they will be working from. <p><u>5 Points</u></p>	
<p>2c. How does your Company rank nationally?</p> <ul style="list-style-type: none">i. By case/premium and products offered?ii. Provide your firms Industry Rating by either AM Best, Fitch, Moody's, or Standard& Poor's <p><u>5 Points</u></p>	
<p>2d. Provide a list of the governmental and or public entities, similar or greater in size (number of insured) to Broward County, that the Company has provided pre-paid legal services for over the last five (5) years.</p> <ul style="list-style-type: none">i. Provide address, and verified current contact information including telephone number and e-mail address. <p><u>5 Points</u></p>	
<p>2e. What is the total number of:</p> <ul style="list-style-type: none">I. Number of attorneys in tri-county areaii. Number of attorneys by area of expertise <p><u>5 Points</u></p>	
<p>3. QUALITY OF SERVICE AND CUSTOMER SERVICE - 16 POINTS</p> <p>3a. Please describe your overall customer service strategy for Group Prepaid Legal Insurance Services</p> <ul style="list-style-type: none">i. Include location, hours of operation and duties of any call centers and their toll free number. <p><u>2 Points</u></p>	
<p>3b. What is the average time from when a member calls in, to when they can receive a referral to an attorney?</p> <p><u>3 Points</u></p>	
<p>3c. After contacting an attorney, what is the average time before the member is able to meet with the attorney?</p> <p><u>3 Points</u></p>	
<p>3d. What is the turnaround time to receive a return phone call from the in-network attorney?</p> <p><u>2 Points</u></p>	

<p>3e. How do you ensure your attorneys are licensed in the State of Florida and continually remain in good standing? Is this information available to enrollees? <u>3 Points</u></p>	
<p>3f. What materials/services do you provide to support non-English speaking employees and hearing impaired callers? <u>3 Points</u></p>	
<p>4. ENROLLMENT AND IMPLEMENTATION - 14 POINTS 4a. What role does your company play during implementation? i. Describe the role of the Implementation Manager at your company. ii. How do they interact with the County enrollment team? <u>5 Points</u></p>	
<p>4b. Will dedicated support be provided for ongoing service phases? i. Describe. <u>3 Points</u></p>	
<p>4c. Explain how you will work with the County to ensure a smooth enrollment experience? <u>2 Points</u></p>	
<p>4d. What are your recommended number and methods of communications to ensure employee engagement? <u>2 Points</u></p>	
<p>4e. Reproduction and mailing costs for standard enrollment materials included in your rates? <u>2 Points</u></p>	
<p>5. QUESTIONNAIRE AND PERFORMANCE GUARANTEES - 20 POINTS 5a. Project Specific Vendor Questionnaire <u>10 Points</u></p>	
<p>5b. Performance Guarantees <u>10 Points</u></p>	
<p>6. PRICE - 20 POINTS Submit your pricing in the Item Response Form in BidSync**</p>	
<p>TOTAL NUMBER OF POINTS = 100 POINTS</p>	