



AUGUST 3, 2018

RFP #18012BB - PENSION ADMINISTRATIVE SERVICES

Vendor Questions

1. Would the committee consider proposals that incorporate two different pricing scenarios? **No**, One being recordkeeping only and an alternative proposal for recordkeeping services that include some element of investment management? **Only interested in the administrative services.**
2. Is this a new requirement or is there an incumbent? **New venture**
3. If there is an incumbent, will you provide the name of the contractor? **No incumbent**
4. Is it expected that the work will be performed at a GHS location or from the contractor's site? **From the contractor's site.**
5. How long is the contract term i.e. number years? Does the term of the contract involve option periods? **3 year term.**
6. Does the scope of work include any travel that may be outside of the Atlanta metro? **No**
7. Please confirm that the plan is a pension plan and not a defined contribution plan. **Pension Plan**
8. Will the contractor have direct access to the paying agent? **Yes**
9. Who calculates or is expected to calculate plan benefits? **Most calculations have been completed. On occasion, a calculation may need to be done and it would be done by the selected vendor.**
10. Who initiates or is expected to initiate plan payments? **Administrative Services Partner**
11. Will the administrator be calculating benefit amounts related to Domestic Relations Orders? **Yes**
12. The scope of work indicates "provide customer service..." What is included in GHS' definition of customer service that is to be provided under the scope of work? Does GHS have customer service standards which performance will be measured against? **Please consider "basic" customer service. Generally, our respond time is within 24-48 hours. These details can be outlined later within the agreement as – Key Performance Indicators (KPIs).**
13. Will providing customer service entail participants and beneficiaries calling GHS or a contractor provided help-line? **Yes, a contractor help-line**



14. Will any participants visit the contactor's site for customer assistance? **No**
15. The RFP indicates "providing ongoing participant support..." What is included in GHS's definition of ongoing participant support? **Updating method of payment, address changes, updating beneficiary information, etc.**
16. The RFP indicates "the administrator is ultimately accountable to all...". Can GHS expand on its definition of accountability and clarify expectations in this area? **Protecting plan against fraud, following up with participants, responsiveness to inquiries, etc.**
17. Is the plan administrator expected to assume any fiduciary responsibilities? **Yes, protecting the Plan against fraud**
18. Are evaluation factors weighted equally? **Weights are determined by the Technical Review Team.**
19. Are the technical factors more important than price? **We consider cost, quality and best outcome when sourcing any new product or services. Weights are determined by the Technical Review Team.**
20. Will the plan administrator be providing any forms, documents, etc.? If yes what type? **Yes, the vendor will distribute and receive benefit verifications, retirement application packets to initiate pension payments. The retirement application packet includes an official payment application, tax election form, direct deposit form, and application packet check list. Also the vendor will distribute joint and survivor forms for death benefit payments if applicable. Upon request from Active or Former Vested participants, revised calculation letters will be provided by the vendor.**
21. If the administrator will be providing documents and forms, will the administrator be responsible for mailing these documents? Yes if yes, can you provide an estimate on the annual number of documents that will be mailed? **We encourage utilization of electronic devices. Mailing is minimal**
22. Just to confirm that we will be responding to the administrative tasks as described on page 4 of the RFP. Are there any additional administrative tasks that GHS be interested in outsourcing? **Not at this time**
23. Will there be an eventual scope of services (SOS) that will be completed during contracting? Would GHS be open to receiving our 'standard' SOS as part of our submission? **Yes, and yes we will receive & review all documents presented as part of the proposal.**
24. What is the preferred contract duration for Grady and its vendors? **3 year term.**
25. Do plan participants and GHS have web access today? **No**
26. Can you provide any annual transaction volumes / estimates?
 - a. **Calls – Approximately 2500 pension inquiries annually**
 - b. **Retirements – 150- 200 annually (includes former vested participants)**
 - c. **Benefit estimate packages 300 (includes active and former vested participants)**
 - d. **Emails – 300-500 email inquiries from active and former vested participants**
27. Are all of the frozen benefits fully calculated? **For the most part yes**



28. Supplier Diversity. The supplier diversity goal is currently 0% of the contract value. Will GHS consider increasing that to 25% whereby qualified diverse suppliers may be included in a mandatory sub-contracting plan of a non-diverse supplier? **Yes, we would consider 25% as a Supplier Diversity goal for a non-diverse supplier.**

29. Supplier Diversity. If proponent is a certified Diverse Business Enterprise, do the expectations/requirements of Section 7 apply? **Yes, Section 7 will still apply.**