



# SAN FRANCISCO HEALTH SERVICE SYSTEM

Affordable, Quality Benefits & Well-Being

## ADDENDUM NO. 2

### RFP for Life and Disability Benefits Request For Proposal (RFPQHSS2024.B1)

December 20, 2024

## REQUEST FOR PROPOSALS FOR

### Life and Disability Benefits for the San Francisco Health Service System (RFPQHSS2024.B1)

CONTACT: [michael.visconti@sfgov.org](mailto:michael.visconti@sfgov.org); cc: [anne.thompson2@aon.com](mailto:anne.thompson2@aon.com) &  
[patrick.chang@sfgov.org](mailto:patrick.chang@sfgov.org), cc:

This Addendum is being issued to modify the requirements in the above-referenced Request for Proposals (RFP) and to respond to questions and requests for clarification received by or before Friday, December 13, 2024 at 12:00 PM (PT) (the “Deadline for RFP Questions” as amended by Addendum No. 1).

Please review the terms of the RFP and this Addendum carefully. If there are any inconsistencies between the RFP (issued December 3, 2024) and the terms of this Addendum No. 2, then the terms of this Addendum No. 2 shall prevail.

Section references below are to the RFP and are provided for convenience of reference only.

## A. Modifications to the RFP

### 1. **Schedule and Key Dates.**

In order to provide the requisite detail in response to questions received prior to the Deadline for RFP Question (December 13, 2025), SFHSS is amending the RFP as follows:

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#### **Schedule – Key Dates and Deadlines**

▪ RFP Issued	December 3, 2024
▪ <b>Deadline for RFP Questions</b>	<b>December 13, 2024 (8:00AM PT)</b>
▪ Responses to Questions Posted*	January 13, 2025
▪ <b>Deadline for Proposals (Sec. 3.3)</b>	<b>February 3, 2025 (12:00PM PT)</b>
▪ Requests for Clarification	February 3 - 21, 2025
▪ Notification of Oral Interviews	February 24, 2025
▪ <b>Oral Interviews</b>	<b>March 20-21, 2025**</b>
▪ Notice of Intent to Award (est.)	April 10, 2025
▪ Implementation Period (est.)	April - December 2025
▪ Open Enrollment (est.)	October 1 – 31, 2025
▪ Coverage Beginning	January 1, 2026

\* Questions will be answered and posted on a rolling basis to <https://sfhss.org/RFPs>. Submitters will be notified via email at the time of posting.

\*\* Oral Interviews may be conducted in person at the SFHSS Offices located at 1145 Market Street, San Francisco, California 94103 (see Section 4.3 below).

### 2. **RFP Section 3.2 (Minimum Qualifications), paragraph M. (pp.28-29) posted at <https://sfhss.org/RFPs> is hereby amended to read:**

M. Respondent will provide dedicated ongoing off-site support and resources to assist SFHSS in the administration of the group life insurance and the group disability policies, and to assist eligible employees with voluntary benefit policies. These duties are expected to include, but not be limited to, (i) assisting SFHSS and insured employees with understanding coverage and benefit features and with claim filing requirements; (ii) assisting claimants in submitting disability, death and waiver claims; (iii)

reviewing enrollment applications for accuracy; (iv) assisting in annual enrollment needs such as benefit fairs, enrollment meetings, and trainings; (v) verifying evidence of insurance ("EOI") requirements, providing EOI forms and instructions; (vi) collecting beneficiary designation forms, reviewing for completeness and providing to SFHSS for retention; (vii) forwarding beneficiary designation form with the life insurance claim form to SFHSS when a life insurance claim is made; (viii) responding to employee, insured member and beneficiary communications regarding claim status; (ix) answering employee and insured member questions regarding benefits; (x) responding to SFHSS insurance and policy questions; and (xi) supporting SFHSS in updating new hire orientation materials.

**3. RFP Section 3.3 (Submission of Proposals) is hereby amended to read:**

Proposals [Questionnaire and Redline of Appendix A (Standard Agreement)] must be received no later than **Monday, February 3, 2025 at 12:00 PM (PT)** (“**Deadline for Proposals**”) via email to [michael.visconti@sfgov.org](mailto:michael.visconti@sfgov.org), cc: [patrick.chang@sfgov.org](mailto:patrick.chang@sfgov.org).

Submission of a Proposal shall be considered an electronic signature of the person authorized to obligate your company to the scope, terms, specifications, and pricing contained in the Proposal (RFP Section 3.1 "Authorized Representative").

- The Questionnaire must be in Microsoft Excel format (.xlsx).
- The Redline Appendix A (Standard Agreement) must be in Adobe PDF (.pdf) format.
- **Implementation Plan<sup>23</sup>**

**Late submissions will not be considered.**

SFHSS recommends emailing your proposal at least two (2) hours prior to the deadline and/or sending a second email requesting confirmation of receipt without any attachments.

**Note to Respondents:** electronic submissions which exceed 20MB will be rejected by City email servers. If your submission is close to or may exceed 20MB, notify Michael Visconti [michael.visconti@sfgov.org](mailto:michael.visconti@sfgov.org), cc: [patrick.chang@sfgov.org](mailto:patrick.chang@sfgov.org) by or before 8:00 AM (PT) on Friday, January 31, 2025. Upon timely notification, SFHSS will provide an alternative submission method.

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