

ADDENDUM 1

Durham Public Schools Request for Statement of Proposal (RFP)

**RFP # 179-2425-266-VOLUNTARY_BENEFITS
Date: 5/29/25**

ADDENDUM 1 – Questions and Answers

Q1. Technology Integration: Does the current system used by Durham Public Schools for benefits administration support integration with third-party vendors for Section 125 Flexible Benefits Plans?

A1. Durham uses AS400 for payroll. Our current Section 125 vendor uses Selerix platform for enrollment. Scheduled enrollment files are uploaded into AS400 for benefits deductions.

Q2. Plan Administration: Will the vendor be responsible for ongoing plan administration and customer service, or will Durham Public Schools manage these aspects internally?

A2. Both

Q3. Future Plan Modifications: Are there any plans to modify the Section 125 plan in the near future (e.g., adding new benefits or adjusting eligibility)?

A3. No

Section 125 Flexible Benefits Plan Details:

Q4. Could you provide a summary of the current design and components of the Section 125 Flexible Benefits Plan?

A4. @HR They need a copy of the current booklet

Q5. What are the eligibility requirements for participation in the Section 125 plan?

A5. Full time employees and permanent part time employees working 20 hours or more meets the eligibility requirements.

Q6. How are contributions to the plan structured (e.g., employee vs. employer contributions)?

A6. For Term Life insurance, the employer pays for basic coverage for all benefits eligible employees. All other benefits are paid by the employee.

Q7. Could you clarify the enrollment process for employees in the Section 125 plan and whether there is a designated enrollment period each year?

A7. Employees may either enroll online or contact the call center. There is an open enrollment period each year.

Q8. Is the plan integrated with other benefits offered by Durham Public Schools (e.g., health insurance, dental, vision)?

A8. Health Insurance enrollment is completed in a separate platform.

Q9. What specific compliance and reporting requirements must be met for the Section 125 plan?

A9. We expect the broker to be versed in these requirements and to support the district accordingly.

Q10. How is the Section 125 plan currently administered? Is it managed internally, or is a third-party administrator (TPA) used for benefits management and compliance? If a TPA is involved, could you provide details about the current vendor relationship?

A10. Durham Public Schools Section 125 benefits is handled by a TPA. Durham has a good relationship with this vendor and feels that this vendor is very supportive and solution driven. We have monthly in person meetings to handle administrative tasks and resolve outstanding issues.

I would like to request the following documents and information to ensure our proposal aligns with Durham Public Schools' needs:

Q11. Employee Census: A current census of employees eligible for voluntary benefits.

A11. Mark III should provide a census file.

Q12. Claims Data: Any claims reports or historical data related to the voluntary benefits offered to employees.

A12. This needs to come from Mark III

Q13. Previous Benefit Plans: Information on past or current voluntary benefits plans, including any evaluations or reports.

A13. Defer to Finance for response.

Q14. In preparation for our response to RFP #179-2425-266 – Voluntary Benefits, we respectfully request a current employee census file. Access to this data will enable us to provide accurate and competitive pricing aligned with the demographics and needs of Durham Public Schools.

Please let us know if a census file can be made available or if there is a standard template we should use for projections.

A14. Mark III should provide this

Q15. Will this RFP entertain offers from companies willing to provide Life, AD&D, LTC, and STC benefits ONLY? Or do they want 1 company that will sell and service all services?

A15. Durham wants one company for all Section 125 benefits.

Q16. Is there an available census for eligible FT (working 35 hours or more weekly) employees for this plan including the DOB's, genders, salaries, work locations, occupations, class designations?

A16. Mark III should provide a census file.

Q17. Is spousal coverage requested for proposal as well?

A17. Yes

Q18. Is a spousal census available?

A18. No.

Q19. Is this plan going to be a takeover from an existing plan?

A19. It depends on which firm is selected.

Q20. Is current election amounts for voluntary and Supplemental coverages available?

A20. Yes, with the exception of whole life.

Q21. Is there an in-force Contract/Booklet available with in-force rates?

A21. Yes.

Q22. Is there claims information?

A22. There is information provided on claims submissions in the booklet.

Group Term Life & AD&D

Q23. Is this plan looking for?

- a.** Employer Paid Basic Life with AD&D
- b.** Employee Paid Voluntary Life with AD&D
- c.** Employer & Employee Paid Basic Life with AD&D & Supplemental Life with AD&D

A23. Employer & Employee Paid Basic Life with AD&D & Supplemental Life with AD&D

Short Term Disability (STD) & Long-Term Care (LTC)

Q24. Is this plan looking for?

- a. Employer Paid
- b. Employee Paid
- If employee paid, what % is employee's contribution?
- If employee paid, select plan design:

Percent of Salary?

Incremental?

This should mirror our current parameters in the Mark III booklet.

A24. Defer to Finance for response.

Q25. Are you requesting plan design and pricing at this time?

A25. We are making our decision based on a blend of service and pricing. Please provide pricing to assist our decision-making process.

Q26. We do not see any questions contained within the RFP related to voluntary benefits, benefits administration, or section 125 services. What sort of information are you looking for to base your evaluation off of?

A26. We are going to base our evaluation on your ability to service the plan for a district our size in tandem with pricing.

Q27. What is the current employee count and benefit-eligible population?

A27. Use Marrk III census file.

Q28. Is there a Scope of Work outline that can be provided?

A28. We are expecting a full-service model that includes: brokering with carriers, managing education/enrollment meetings, providing customer service support to our employees and assisting our staff with administering and reconciling the plan.

Q29. Which voluntary benefit lines are currently offered (e.g., accident, critical illness, hospital indemnity, short-term disability, long-term disability, or others)?

A29. All

Q30. Could you provide a copy of the current benefit guide or a summary of existing offerings?

A30. @HR They want a copy of the booklet.

Are you seeking a technology solution for enrollment as part of this RFP? If Yes:

Q31. What enrollment platform is currently in use?

Does it support both core and voluntary benefit elections, or is it limited to voluntary benefits?

If limited to voluntary benefits, is there interest in consolidating into a single benefits administration platform?

A31. Selerix

Q32. What system(s) are currently used for payroll and HRIS?

A32. AS400 but transitioning to Sylogist with January 2026 payroll.

Q33. How do employees currently access enrollment? (e.g., self-enrollment, fully facilitated support, or a combination of both)

A33. Both

Q34. Is the platform and/or enrollment support available year-round (e.g., for new hires and qualifying life events), or is it limited to Open Enrollment?

A34. Yes

Q35. If enrollment support is offered, what does that process look like today? (e.g., inbound call center, scheduled one-on-one appointments, onsite assistance, etc.)

A35. All

Q36. Are there any specific challenges or items with your current setup that you are aiming to improve through this RFP?

A36. Not necessarily. We are overdue for a review of the account and want to make sure we are receiving the best service possible.

Q37. How many benefit-eligible employees do the County Schools have? Is it possible to get a census?

A37. Use the Mark III census file.

Q38. Are Durham County Schools seeking enrollment services, such as onsite support, call center and online enrollment, including communications?

A38. Yes.

Q39. Are commissions currently included in the voluntary benefit plans? If so, are they funding the enrollment and communication services, if applicable?

A39. We are not paying anything to the current broker for their services; however, we cannot speak to commission arrangements they may or may not have in place with carriers.

Q40. Can you confirm all current voluntary plans are on a post-tax basis only?

A40. Pre-tax: Flex Accounts, Dental, Vision, AD&D, and Hospital Indemnity Post tax: Critical Illness, STD, LTD, Term Life and Whole Life

Q41. Can you share the current participation number in each line of coverage of the voluntary benefit plans? Defer to Finance for response. May need deduction registers pulled for each of the Section 125 benefits to provide these numbers.

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