



## **PIMA COUNTY NOTICE OF REQUEST FOR PROPOSALS (RFP)**

**Solicitation Number:** 1000712 **Title:** Life Insurance Benefits

**DUE IN AND OPENS:** DECEMBER 10, 2009 AT OR BEFORE 10:00 A.M. LOCAL AZ TIME (MST)

**Submit Proposal to:**

Pima County Procurement Department  
130 West Congress, 3rd Floor, Receptionist  
Tucson, Arizona 85701

**Pre-Proposal Conference:** December 1, 2009 AT 11:00 A.M (MST)

Pima County Procurement Department  
130 West Congress, 3rd Floor  
Tucson, Arizona 85701

**SOLICITATION:** Pima County is soliciting proposals from Offerors qualified, responsible and willing to provide the following Goods and/or Services in compliance with all solicitation specifications and requirements contained or referenced herein.

**GENERAL DESCRIPTION:** Basic Life, Accidental Death & Dismemberment and Supplemental Life Insurance for Pima County Employees and their dependents to become effective 07/01/2010. The resulting contract will be for a one-year period, with the option of the County to renew for four-additional one-year periods per specifications called for herein.

You may download a full copy of this solicitation at [www.pima.gov/procure/ifbrfp.htm](http://www.pima.gov/procure/ifbrfp.htm) by selecting the solicitation number. Offerors are required to check this website for addenda prior to the Due In and Opens Date and Time to assure that the proposal incorporates all addenda. Prospective Offerors may also pick up a copy, Monday through Friday excluding legal holidays, 8 am to 5 pm LOCAL ARIZONA TIME (MST), at the address listed above.

A Pre-Proposal Conference will be held for the purpose of clarifying requirements and answering prospective offeror questions. It is the responsibility of Prospective Offerors to familiarize themselves with all requirements of the solicitation and to identify any issues at the conference. Attendance is optional and encouraged.

Proposals shall be submitted as defined in the Instructions to Offerors, in accordance with the Standard Terms and Conditions, and all solicitation documents either referenced or included herein. Failure to do so may be cause for rejection as *non-responsive*.

Offerors must complete and return those documents identified in the Instruction to Offerors Submission of Proposals instruction.

Proposals may not be withdrawn for 60 days after opening except as allowed by Pima County Procurement Code.

The licenses as issued and required by the Arizona Department of Insurance for the proposing business entity and key personnel.

Bonds are not required.

**OFFERORS ARE REQUIRED TO READ THE ENTIRE SOLICITATION, INCLUDING ALL REFERENCED DOCUMENTS, ASSURE THAT THEY CAN AND ARE WILLING TO COMPLY, AND TO INCORPORATE ALL ASSOCIATED COSTS IN THEIR PROPOSAL.**

Questions and Deviation requests shall be submitted in writing to Procurement Department, Attention: Jennifer Moore. All submittals shall reference the Solicitation Number and Title; Questions or Deviation Requests submitted within 8 days of the solicitation *Due In and Opens Date and Time* may not be answered.

**Fax:** (520) 791.6509 **email:** [Jennifer.Moore@pima.gov](mailto:Jennifer.Moore@pima.gov)

**USPO Mail to the following address:**

Pima County Procurement Department, 130 W. Congress, 3rd Floor, Mailstop # DT-AB3-126; Tucson, AZ 85701

**VERBAL REQUESTS FOR CLARIFICATIONS OR INTERPRETATIONS WILL NOT BE ACCEPTED.**

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Jennifer Moore, CPPB  
Commodity/Contracts Officer

**Publish:** The Territorial: November 12,13, 16 & 17, 2009

**INSTRUCTIONS TO OFFERORS**

**1. PREPARATION OF RESPONSES**

All proposals shall be made using the forms provided in this package. All prices and notations must be printed in ink or typewritten. **No erasures are permitted.** Errors may be crossed out and corrections printed in ink or typewritten adjacent to error and shall be initialed in ink by person signing the proposal. Typewritten responses are **preferred**.

All proposals shall as appropriate indicate the registered trade name, stock number, and packaging of the items included in the proposal.

Surety required by this solicitation may be in the form of a bond, cashier's check or certificate of deposit made payable to *Pima County*. Personal or company checks are not acceptable.

**1A: BACKGROUND INFORMATION:**

The Insurance Program consists of four plans:

Plan 1: Basic Life (including AD&D at like amount) (County paid) --employee coverage

Plan 2: Supplemental Life (employee paid) – employee coverage available

Plan 3: Supplemental AD&D (employee paid) – employee only or employee and family coverage available

Plan 4: Dependent Life (employee paid) – spouse/domestic partner and/or dependent children coverage available

Basic Life and AD&D: Is coverage provided to eligible employees. All premiums for the basic life coverage will be paid by Pima County.

Supplemental Life Insurance and Dependent Life Insurance are voluntary for employees and will be paid by the employees. The payments for these voluntary plans are currently being processed via payroll deduction.

All four plans must at a minimum include all the services, at the levels specified in Pima County's current program, a copy of which can be found at <http://www.pima.gov/hr/EmployeeBenefits/lifeins.htm>.

All term coverage shall be convertible and or portable in the event of employment termination or the dependent is no longer qualified under dependency coverage. Employees shall be able to convert for a period of 30 days from the occurrence of either event, or standard age/cost rules and "guarantee issue" rules shall apply.

A Waiver of Premiums shall be granted to any employee becoming disabled. In the event of contract termination, the contractor shall pay for any claims in transit for those currently qualified for an extension due to disability.

The following information has been provided for information purposes in order for respondent to provide pricing:

Attached Sample Contract,

Exhibit A: Scope of Services,

<http://www.pima.gov/hr/EmployeeBenefits/lifeins.htm>

Attachment "A": Claims Experience 2008

Attachment "B": Claims Experience 2007

Attachment "C": Claims Experience 2006

Attachment "D": Claims Experience 2005

Attachment "E" Life Insurance Census 2009

No guarantee of any specific amount of supplemental insurance business is implied or guaranteed.

**2. PRICING and OFFER CERTIFICATION DOCUMENTS**

Throughout this solicitation document, the meaning of *proposal* and *offer* are intended to be synonymous.

Offerors shall complete and submit their offers utilizing the forms provided by this solicitation. Requested information and data shall be provided in the precise manner requested. Product descriptions shall provide sufficient information to precisely document the product being offered. Failure to comply may cause the proposal to be improperly evaluated or deemed non-responsive.

The proposal/offer certification document must be completed and signed by an authorized representative certifying that the firm can and is willing to meet all requirements of the solicitation. Failure to do so may be cause to reject the proposal as non-responsive.

**INSTRUCTIONS TO OFFERORS (continued)**

All unit prices shall remain firm for the initial term of the executed agreement, with the exception that should offeror during the term of the agreement offer to another buyer pricing for like or similar quantity, products or services at price more favorable than those given to the County, that offeror shall offer same pricing to County effective on the date offered to other buyer. Unit prices given by offeror shall include all costs required to implement and actively conduct and document cost control and reduction activities. Unit Prices shall include all costs and, unless otherwise specified, shall be F.O.B. Destination & Freight Prepaid Not Billed ("F.O.B. Destinations"). Unit prices shall prevail in the event of an extension error. Price each item separately. Delivery time if stated as a number of days, shall mean "calendar" days. Pima County reserves the right to question and correct obvious errors.

**3. GENERAL SPECIFICATIONS & DEVIATIONS**

The specifications included in this solicitation are intended to identify the kind and quality of goods and/or services to be provided without being unnecessarily restrictive, and as required to provide the information needed for the development of consistent and comprehensive proposals.

Equipment brand names, models and numbers, when given are intended to identify a level of quality, equivalent performance and dimensional specifications, and are for reference only, unless otherwise specified in the solicitation.

Failure to perform appropriate research, discovery, examine any drawings, specifications, and instructions will be at the offeror's sole risk.

Items included in the proposal shall meet the specifications and requirements set forth by the solicitation.

Deviation requests shall specifically document and clearly illustrate the deviation to the particular specification or the requirement set forth by this solicitation and fully explain the requested deviation's impact on the end performance of the item. Deviation requests shall be submitted prior to the initial solicitation due date. Requests submitted within 8 days of the solicitation due date may not be answered. Acceptance or rejection of said deviation request shall be at the sole discretion of the County and in accordance with Pima County Procurement Code.

Offerors are advised that conditional offers that do not conform to or that request exceptions to the published solicitation and addendums may be considered non-responsive and not evaluated.

All equipment shall be models of current production, latest design and technology, new and unused unless otherwise specified Manufacturer and offeror documentation, including and not limited to the following shall be provided by the successful offeror not later than 14 days after request by the County and at no additional cost; warranty; caution-informational warnings; recommended maintenance schedule and process; recommended spare parts list; operating, technical and maintenance manuals including drawings, if appropriate; product brochures; and material safety data sheets (MSDS).

**4. OFFERORS MINIMUM QUALIFICATIONS**

In order for proposals to be evaluated and considered for award, proposals must be deemed **Responsive and Responsible**. To be deemed "**Responsive**", the submitted offer documents shall conform in all material respects to the requirements stated by the solicitation. To be deemed "**Responsible**", offerors shall document and substantiate their capability to fully perform all requirements defined by the solicitation. Factors considered include and may not be limited to experience, integrity, perseverance, reliability, capacity, facilities, equipment, credit and other factors required to provide the performance defined by the solicitation.

Offeror shall certify that they possess the minimum qualifications contained in **FORM 2: Minimum Qualifications Verification Form (1 Page)**. Offeror shall provide the requested documents that substantiate their satisfaction of the Minimum Qualifications. Failure to provide the information required by these Minimum Qualifications and required to substantiate *responsibility* may be cause for the offeror's proposal to be rejected as **Non-Responsive and/or Non-Responsible**.

**INSTRUCTIONS TO OFFERORS (continued)****5. EVALUATION AND AWARD CRITERIA**

Pima County shall evaluate proposals deemed **Responsive and Responsible**. Proposals shall be evaluated according to the evaluation criteria set forth herein. Evaluation of cost shall be made without regard to applicable taxes.

<b><u>CRITERIA</u></b>	<b><u>MAXIMUM POINTS</u></b>
A. Cost ("Total Price Offered")	50 points
B. Company Experience	10 points
C. Key Personnel	10 points
D. Project Plan/Ease of Implementation	15 points
E. References	10 points
F. Sustainability Practices	05 points
Total	100 points

The evaluation criteria will be used by the evaluation panel when scoring the offeror's answers to the questions contained in **FORM 3: Questionnaire (2 Pages)**. Offeror should respond in the form of a thorough narrative to each specification as guided by the Questionnaire. The narratives along with required supporting materials should be evaluated and awarded points accordingly. Forms provided and requested for inclusion in this proposal shall not be modified.

**Evaluation Criteria**

The evaluation committee will assign points to each proposal submitted on the basis of the following evaluation criteria, unless otherwise indicated:

**A. Cost (0 to 50 points)**

Offerors shall propose one firm, fixed, fully-loaded bi-weekly premium (rate) per Plan. The firm, fixed, fully-loaded premium rate shall include all direct cost, indirect cost, overhead and profit margin, as well as subcontractor's total costs if appropriate.

The Plans and available points are as follows:

Plan 1: Basic Life (including AD&D at like amount) --employee coverage 30 points available

Plan 2: Supplemental Life – employee coverage available – 10 points available

Plan 3: Supplemental AD&D – employee only or employee and family coverage available – 5 points available

Plan 4: Dependent Life – spouse/domestic partner and/or dependent children coverage available – 5 points available

**SMALL BUSINESS ENTERPRISE (SBE) PREFERENCE (Professional Services Excluded)**

**For those proposals whose cost does not exceed \$500,000 per contract year**, a 5% bid preference will be given to firms submitting SBE Certificates issued by the City of Tucson WITH THEIR BID; said certification is subject to verification and acceptance by Pima County. If the certification is accepted by Pima County, the bid will be evaluated at 95% of the Total Price Proposed amount to determine the low and responsive bid. If an award of contract is made, the contract will be formed utilizing the Unit Prices, Total Price Proposed or as negotiated. **To be eligible for the price preference, SBE firms must include with their proposal documents a copy of their current SBE certificate document** which may be acquired from the City of Tucson; Office of Equal Opportunity Programs, (520) 791-4593 (520) 791-2639 TTY, 201 N. Stone Ave. , 3rd Floor North , Tucson , AZ 85701 Their SBE website, which typically includes an SBE Directory & Application forms listing of firms holding SBE Certification, is located at: <http://www.tucsonaz.gov/eoo/sbe.html>

The process of acquiring SBE Certification may take several weeks. Please contact the Pima County Vendor Relations Division at (520) 740-3296 for assistance or further information.

**COST POINTS CALCULATION**

Points for the cost will be calculated by the Procurement Department based on the Total Price Proposed (TPP) using the following formula: Lowest Total Price Proposed Amount(LTPP) will receive the maximum quantity of points. Other proposals will be allocated points using the following formula: (LTPP / Other TPP) x Maximum Points = Score. This point calculation formula will be used for each Plan.

**INSTRUCTIONS TO OFFERORS (continued)**

**B. Company Experience (0 to 10 points)**

Offerors should include in their proposals documentation describing the extent of their experience and expertise for work related to employee life insurance.

Offerors should include in their proposals sample of work performed from previous clients.

Points for the company experience will be based on documented successful experience on similar projects and engagements relating to employer group life insurance. This will include a requirement to provide the County with verifiable or certified data relating to the approval/declination rates of requests to increase coverage.

**C. Key Personnel; (0 to 10 points)**

Offerors should provide resumes of all proposed key personnel who will be performing services under the contract. Experience narratives shall describe the specific relevant experience in relation to the work to be performed in this contract as well as their certifications or other professional credentials that clearly show how they meet and/or exceed the minimum requirements set forth in this solicitation.

Offerors shall include in their proposal copies of appropriate professional certifications for key personnel.

Points for the Key personnel will be based on each staff member's experience as it relates to their role and the needs of this contract.

**D. Project Plan/Ease of Implementation: (0 to 15 points)**

Offerors should provide a thorough project plan to include a milestone chart including tasks to be performed, the time frame and proposed staff member designated for the completion of each task.

Points for the project plan will be based on the quality and thoroughness of the project plan.

**E. References: (0 to 10 points)**

Offeror shall have three (3) public references documenting the offeror's ability and expertise in providing the similar services in this solicitation. References must be from companies having a minimum of 10,000 insured lives.

Offeror shall provide **FORM 4: Reference Form** to their clients. Failure to provide the required number of references or information required by the form may be cause for the offeror's proposal to be rejected as **Non-Responsive**.

Points for the references will be based on the offeror's work for its clients receiving similar services to this solicitation.

**F. Sustainability Practices (0 to 5 points).**

County reserves the right to request additional information and/or clarification. Any clarification of a proposal shall be in writing. Recommendation for award will be to the responsible and responsive offeror whose proposal is determined to be the most advantageous to the County taking into consideration the evaluation criteria set forth in this solicitation.

If an award is made, the County will enter into an agreement with the one Offeror that submitted the highest scoring responsive and responsible offer(s) by executing and transmitting a blanket contract or purchase order document that incorporates the Offer without further action by the Offeror. The County may conduct discussions with the Offeror to clarify the Offer and Agreement details provided that they do not substantially change the intent of the solicitation. Unless otherwise specified, relative ranking of proposal(s) will be made considering the average of total points given to each proposal by evaluators.

**INSTRUCTIONS TO OFFERORS (continued)**

**6. SUBMISSION OF OFFERS**

Offerors are to complete, execute and submit **one original and 5 copies** of the required documents. The submittal shall include all information requested by the solicitation, and utilize without modification the forms provided by the solicitation that includes and may not be limited to the following:

- A. **FORM # 1: Certification**, complete and provide the requested information which may include and not be limited to, Addenda and Acknowledgement information. Incomplete or Unsigned documents may be deemed non-responsive.
- B. **FORM# 2: Minimum Qualifications Verification Form**, fully completed as requested, including the required documentation.
- C. **FORM# 3: Questionnaire**, fully completed as requested, including all requested documentation.
- D. **FORM# 4: References**, This form is to be provided by offeror to their current clients. The clients shall complete the form. Offeror must verify that at least 3 current clients complete the form on offeror's behalf. At a minimum, references must include three (3) public sector employers with a minimum of 10,000 insured lives. Failure to meet this requirement may cause submittal to be deemed non-responsive. Offer shall include as a part of proposal completed reference forms.

The proposal shall be bound and indexed in the order as indicated above with the exception of FORM 4 Reference documents which shall be submitted by the selected Reference Firms. Please do not use 3-ring hard cover binders.

Proposals must be received and time stamped at the specified location at or before the Due Date/Time as defined by the *Request for Proposals*. Unless specified requested (References) Facsimiles will not be accepted. The "time-stamp" provided by the County shall be the official time used to determine the timeliness of the submittal. Proposals and modifications received after the Due Date/Time will not be accepted, or will be returned unopened. Timely submittals will be opened and recorded promptly after the Due Date/Time.

Proposals must be signed by an authorized agent of the offeror and submitted in a sealed envelope marked or labeled with the offeror's firm name, solicitation number, title, solicitation due date and time, to the location and not later than the Due Date/ Time specified by the *Request for Proposals*.

Proposals and modifications received after the closing time specified will not be accepted. Facsimiles of proposals will not be accepted.

Failure to comply with the solicitation requirements may be cause for the offeror's proposal to be rejected as *non-responsive* and not evaluated.

**7. BEST AND FINAL OFFER**

County reserves the right to request additional information and/or clarification with responsible offerors who submit proposals determined to be reasonably susceptible of being selected for award for the purpose of clarification to assure full understanding of, and conformance to, the solicitation requirements.

In the event that discussions are held and clarifications are requested, a written request for best and final offers shall be issued. The request shall set forth the date, time, and place for the submission of best and final offers. If offerors fail to respond to the request for best and final offer or fail to submit a notice of withdrawal, their immediate previous offer will be construed as their best and final offer.

**8. COMPLIANCE WITH AGREEMENT**

County will execute an agreement with the successful offeror by issue of a blanket contract, purchase order or contract. The offeror agrees to establish, monitor, and manage an effective administration process that assures compliance with all requirements of the agreement. In particular, the offeror agrees that they shall not provide goods or services in excess of the executed agreement items, item quantity, item amount, or agreement amount without prior written authorization by revision or change order properly executed by the County. Any items provided in excess of the quantity stated in the agreement shall be at the Offeror's own risk. Offerors shall decline verbal requests to deliver items in excess of the agreement and shall report all such requests in writing to the Pima County Procurement Department within 1 workday of the request. The report shall include the name of the requesting individual and the nature of the request.

**INSTRUCTIONS TO OFFERORS (continued)**

**9. INQUIRIES**

Offerors may submit questions until the close of business as specified by the *Pre-Proposal Conference Date*. If a prospective offeror believes a requirement of the solicitation documents to be needlessly restrictive, unfair, or unclear, the offeror shall notify the Pima County Procurement Department in writing identifying the issue with suggested solution prior to the closing time set for receipt of the solicitation proposal. Issues identified less than 8 days prior to the solicitation opening date may not be answered.

Any question related to this solicitation shall be directed to the Commodity/Contracts Officer of this RFP. The offeror shall not contact or ask questions of the department for whom the requirement is being procured. The questions must be submitted in writing. Any correspondence related to a solicitation should refer to the appropriate solicitation number, page and paragraph number. The County may issue a formal written addendum containing clarifications or modifications of the RFP requirements, if deemed advantageous or necessary. Only questions or issues answered by formal written addendum will be binding. Addendum will be posted on the Pima County Procurement Solicitation Website: <http://www.pima.gov/procure/ifbrfp.htm>.

Results of this procurement will not be given in response to telephone inquiries. Interested parties are invited to attend the public opening at the time and date stated in this solicitation. A tabulation of submittals will be on file at the Procurement Department.

No oral interpretations or clarifications will be made to any offeror as to the meaning of any of the solicitation documents.

**10. VENDOR RECORD MAINTENANCE:**

By submitting a response to this solicitation, the submitter agrees to establish and maintain a complete Pima County Vendor record, including the provision of a properly completed and executed "Request for Taxpayer Identification Number and Certification" document (Form W-9), within ten calendar days of the solicitation due date. The Vendor also agrees to update the information within ten calendar days of any change in that information and prior to the submission of any invoice or request for payment. The preferred method for creating or updating this record is via the Internet utilizing the Pima County Vendor Registration and Messaging Portal (VRAMP). The portal requires that the Vendor establish and maintain email functionality. In addition to providing the means for a Vendor to create and maintain their Vendor record, VRAMP also provides for email notice to the vendor regarding solicitations published by Pima County for commodities of interest as defined by the Vendor record. Internet links for Vendor Registration, VRAMP and commodity codes used to define products and services for which the Vendor is capable of providing, are located at the Procurement Internet page: [www.pima.gov/procure](http://www.pima.gov/procure).

**END OF INSTRUCTIONS TO OFFERORS**

**PIMA COUNTY STANDARD TERMS AND CONDITIONS (07/30/09)**

**1. OPENING:**

Responses will be publicly opened and respondent's name, and if a Bid the amount, will be read on the date and at the location defined in the *Invitation for Bid (IFB)* or *Request For Proposals (RFP)*. Proposals shall be opened so as to avoid disclosure of the contents of any proposal to competing Offerors during the process of negotiation. All interested parties are invited to attend.

**2. EVALUATION:**

Responses shall be evaluated to determine which response is most advantageous to the COUNTY considering evaluation criteria, conformity to the specifications and other factors.

If an award is made, the Pima County (COUNTY) will enter into an agreement with the one or multiple respondent(s) that submitted the lowest bid(s) and determined responsible for supplying the required goods or services. Unless otherwise specified on the Bid/Offer document determination of the low/lowest bids will be made considering the total bid amount.

The COUNTY reserves the following rights: 1) to waive informalities in the bid or bid procedure; 2) to reject the response of any persons or corporations that have previously defaulted on any contract with COUNTY or who have engaged in conduct that constitutes a cause for debarment or suspension as set forth in COUNTY Code section 11.32; 3) to reject any and all responses; 4) to re-advertise for bids previously rejected; 5) to otherwise provide for the purchase of such equipment, supplies materials and services as may be required herein; 6) to award on the basis of price and other factors, including but not limited to such factors as delivery time, quality, uniformity of product, suitability for the intended task, and bidder's ability to supply; 7) to increase or decrease the quantity herein specified. Pricing evaluations will be based on pre-tax pricing offered by vendor.

**3. AWARD NOTICE:**

A *Notice of Recommendation for Award* for IFB or RFP will be posted on the Procurement website and available for review by interested parties. A tabulation of responses will be maintained at the Procurement Department.

**4. AWARD:**

Awards shall be made by either the Procurement Director or the Board of Supervisors in accordance with the Pima County Procurement Code. COUNTY reserves the right to reject any or all offers, bids or proposals or to waive irregularities and informalities if it is deemed in the best interest of the COUNTY. Unless expressly agreed otherwise, resulting agreements are not exclusive, are for the sole convenience of COUNTY, and COUNTY reserves the right to obtain like goods or services from other sources.

**5. WAIVER:**

Each respondent, by submission of an offer, bid or proposal proclaims and agrees and does waive any and all claims for damages against COUNTY or its officers or employees when any of the rights reserved by COUNTY may be exercised.

**6. ACKNOWLEDGEMENT AND ACCEPTANCE:**

If Contractor's terms of sale are inconsistent with the terms of the resultant agreement, the terms herein shall govern, unless Contractor's terms are accepted in writing by COUNTY. No oral agreement or understanding shall in any way modify this order or the terms and conditions herein. Contractor's acceptance, delivery or performance called for herein shall constitute unqualified acceptance of the terms and conditions of the resultant agreement.

**7. INTERPRETATION and APPLICABLE LAW:**

The contract shall be interpreted, construed and given effect in all respects according to the laws of the State of Arizona. If any of Contractors' terms or conditions is not in agreement with County's terms and conditions as set forth herein, COUNTY's shall govern. This Agreement incorporates the complete agreement of the parties with respect to the subject matter of this Agreement. No oral agreement or other understanding shall in any way modify these terms and conditions.

**8. WARRANTY:**

Contractor warrants goods or services to be satisfactory and free from defects.

**9. QUANTITY:**

The quantity of goods ordered shall not be exceeded or reduced without **written** permission in the form of a properly executed blanket contract, purchase order or contract revision or amendment as required by COUNTY Procurement Code except in conformity with acknowledged industry tolerances. All quantities are estimates and no guarantee regarding actual usage is provided.

**PIMA COUNTY STANDARD TERMS AND CONDITIONS****10. PACKING:**

No extra charges shall be made for packaging or packing material. Contractor shall be responsible for safe packaging conforming to carrier's requirements. All packages shall bear the content(s) quantity, product identification, purchase order number, and destination address plainly marked in indelible ink on the exterior of each package.

**11. DELIVERY:**

On-time delivery of goods and services is an essential part of the consideration to be received by COUNTY.

A guaranteed delivery date, or interval period from order release date to delivery, must be given if requested by the Price offer document. Upon receipt of notification of delivery delay, COUNTY at its sole option and at no cost to the COUNTY may cancel the order or extend delivery times. Such extension of delivery times will not be valid unless extended in writing by an authorized representative of the COUNTY.

To mitigate or prevent damages caused by delayed delivery, COUNTY may require Contractor to deliver additional quantity utilizing express modes of transport, and or overtime, all costs to be Contractor responsibility. COUNTY reserves the right to cancel any delinquent order, procure from alternate source, and/or refuse receipt of or return delayed deliveries, at no cost to COUNTY. COUNTY reserves the right to cancel any order and/or refuse delivery upon default by Contractor concerning time, cost, or manner of delivery.

Contractor will not be held responsible for unforeseen delays caused by fires, strikes, acts of God, or other causes beyond Contractor's control, provided that Contractor provide immediate notice of delay.

**12. SPECIFICATION CHANGES:**

COUNTY shall have the right to make changes in the specifications, services, or terms and conditions of an order. If such changes cause an increase or decrease in the amount due under an order or in time required for performance, an acceptable adjustment shall be made and the order shall be modified in writing. Any agreement for adjustment must be made in writing. Nothing in this clause shall reduce Contractor's' responsibility to proceed without delay in the delivery or performance of an order.

**13. INSPECTION:**

All goods and services are subject to inspection and testing at place of manufacture, the destination, or both, by COUNTY. Goods failing to meet specifications of the order or contract shall be held at Contractor's risk and may be returned to Contractor with costs for transportation, unpacking, inspection, repacking, reshipping, restocking or other like expenses to be the responsibility of Contractor. In lieu of return of nonconforming supplies, COUNTY, at its sole discretion and without prejudice to COUNTY's rights, may waive any nonconformity, receive the delivery, and treat the defect(s) as a warranty item, but waiver of any condition shall not be considered a waiver of that condition for subsequent shipments or deliveries.

**14. SHIPPING TERMS:**

Unless stated otherwise by the agreement documents, delivery terms are to be F.O.B. Destination & Freight Prepaid Not Billed ("F.O.B. Destination") are to be included in the Unit Price offered by Contractor and accepted by the COUNTY.

**15. PAYMENT TERMS:**

Payment terms are net 30, unless otherwise specified by the agreement documents.

**16. ACCEPTANCE OF MATERIALS AND SERVICES:**

COUNTY will not execute an acceptance or authorize payment for any service, equipment or component prior to delivery and verification that all specification requirements have been met.

**17. RIGHTS AND REMEDIES OF PIMA COUNTY FOR DEFAULT:**

In the event any item furnished by the Contractor in the performance of the agreement should fail to conform to the specifications thereof, or to the sample submitted by the Contractor, COUNTY may reject same, and it shall thereupon become the duty of the Contractor to reclaim and remove the same, without expense to COUNTY, and immediately replace all such rejected items with others conforming to the specifications or samples. Should the Contractor fail, neglect, or refuse immediately to do so, COUNTY, shall have the right to purchase in the open market, in lieu thereof, a corresponding quantity of any such items and to deduct from any monies due or that may become due to the Contractor the difference between the price named in the contract or purchase order and actual cost to COUNTY. In the event the Contractor shall fail to make prompt delivery as specified of any item, the same conditions as to the rights of COUNTY to

**PIMA COUNTY STANDARD TERMS AND CONDITIONS**

purchase in the open market and invoke the reimbursement condition above shall apply, except when delivery is delayed by fire, strike, freight embargo, or acts of god or of the government. In the event of cancellation of the contract or purchase order, either in whole or in part, by reason of the default or breach by the Contractor, any loss or damage sustained by COUNTY in procuring any items which the Contractor agreed to supply shall be borne and paid for by the Contractor. The rights and remedies of COUNTY provided above shall not be exclusive and are in addition to any other rights and remedies provided by law or under the contract.

**18. FRAUD AND COLLUSION:**

Each Contractor, by submission of a bid, proclaims and agrees that no officer or employee of COUNTY or of any subdivision thereof has: 1) aided or assisted the Contractor in securing or attempting to secure a contract to furnish labor, materials or supplies at a higher price than that proposed by any other Contractor; 2) favored one Contractor over another by giving or withholding information or by willfully misleading the bidder in regard to the character of the material or supplies called for or the conditions under which the proposed work is to be done; 3) will knowingly accept materials or supplies of a quality inferior to those called for by any contract; 4) any direct or indirect financial interest in the offer or resulting agreement. Additionally, during the conduct of business with COUNTY, the Contractor will not knowingly certify, or induce others to certify, to a greater amount of labor performed than has been actually performed, or to the receipt of a greater amount or different kind of material or supplies that has been actually received. If at any time it shall be found that the awardee(s) has in presenting any offer(s) colluded with any other party or parties for the purpose of preventing any other offer being made, then the agreement so awarded shall be terminated and that person or entity shall be liable for all damages sustained by COUNTY.

**19. COOPERATIVE USE OF RESULTING AGREEMENT:**

As allowed by law, the COUNTY has entered into cooperative procurement agreements that enable other Public Agencies to utilize procurement agreements developed by the COUNTY. The Contractor may be contacted by participating agencies and requested to provide services and products pursuant to the pricing, terms and conditions defined by the COUNTY blanket contract, purchase order or contract. Minor adjustments are allowed subject to agreement by both Contractor and Requesting Party to accommodate additional cost or other factors not present in the COUNTY agreement and required to satisfy particular Public Agency code or functional requirements and are within the intended scope of the solicitation and resulting agreement. Any such usage shall be in accordance with State, COUNTY and other Public Agency procurement rules, regulations and requirements and shall be transacted by blanket contract purchase order or contract between the requesting party and Contractor. Contractor shall hold harmless COUNTY, its officers, employees, and agents from and against all liability, including without limitation payment and performance associated with such use. A list of agencies that are authorized to use COUNTY agreements can be viewed at the Procurement Department Internet home page: <http://www.pima.gov/procure> by selecting the link titled *Authorized Use of COUNTY Agreements*.

**20. PATENT INDEMNITY:**

Contractor shall hold COUNTY, its officers, agents and employees, harmless from liability of any nature or kind, including costs and expenses, for infringement or use of any copyrighted composition, secret process, patented or unpatented invention, article or appliance furnished or used in connection with the blanket contract purchase order or contract. Contractor may be required to furnish a bond or other indemnification to COUNTY against any and all loss, damage, costs, expenses, claims and liability for patent or copyright infringement.

**21. INDEMNIFICATION:**

Contractor shall indemnify, defend, and hold harmless COUNTY, its officers, employees and agents from and against any and all suits, actions, legal administrative proceedings, claims or demands and costs attendant thereto, arising out of any act, omission, fault or negligence by the Contractor, its agents, employees or anyone under its direction or control or on its behalf in connection with performance of the blanket contract, purchase order or contract. Contractor warrants that all products and services provided under this contract are non-infringing. Contractor will indemnify, defend and hold COUNTY harmless from any claim of infringement arising from services provided under this contract or from the provision, license, transfer or use for their intended purpose of any products provided under this Contract.

**22. UNFAIR COMPETITION AND OTHER LAWS:**

Responses shall be in accordance with Arizona trade and commerce laws (Title 44 A.R.S.) and all other applicable COUNTY, State, and Federal laws and regulations.

**23. COMPLIANCE WITH LAWS:**

Contractor shall comply with all federal, state, and local laws, rules, regulations, standards and Executive Orders, without limitation. The laws and regulations of the State of Arizona shall govern the rights, performance and disputes of and between the parties. Any action relating to this Contract shall be brought in a court of the State of Arizona in COUNTY.

**PIMA COUNTY STANDARD TERMS AND CONDITIONS**

Any changes in the governing laws, rules, and regulations during an agreement shall apply, but do not require an amendment/revisions.

**24. ASSIGNMENT:**

Contractor shall not assign its rights to the resultant agreement, in whole or in part, without prior written approval of the COUNTY. Approval may be withheld at the sole discretion of COUNTY, provided that such approval shall not be unreasonably withheld.

**25. CONFLICT OF INTEREST:**

All agreements are subject to the provisions of A.R.S. § 38-511, the pertinent provisions of which are incorporated into and made part of all resultant contracts or purchase orders as if set forth in full herein.

**26. NON-DISCRIMINATION:**

CONTRACTOR agrees that during the performance of this contract, CONTRACTOR shall not discriminate against any employee, client or any other individual in any way because of that person's age, race, creed, color, religion, sex, disability or national origin. CONTRACTOR shall comply with the provisions of Arizona Executive Order 75-5, as amended by Executive Order 99-4, which is incorporated into this Contract as if set forth in full herein.

**27. NON-APPROPRIATION OF FUNDS:**

Pursuant to the provisions of A.R.S. § 11-251, sub-section 42, this agreement may be canceled if for any reason the COUNTY Board of Supervisors does not appropriate funds for the stated purpose of maintaining any agreement. In the event of such cancellation, COUNTY shall have no further obligation, other than for services or goods that have already been received.

**28. PUBLIC INFORMATION:**

Pursuant to A.R.S. § 39-121 et seq., and A.R.S. § 34-603(G) in the case of construction or Architectural and Engineering services procured under A.R.S. Title 34, Chapter 6, all information submitted in response to this solicitation, including, but not limited to, pricing, product specifications, work plans, and any supporting data becomes public information and upon request, is subject to release and/or review by the general public including competitors.

Any records submitted in response to this solicitation that Contractor believes constitute proprietary, trade secret or otherwise confidential information must be appropriately and prominently marked as CONFIDENTIAL by Contractor prior to the close of the solicitation.

Notwithstanding the above provisions, in the event records marked CONFIDENTIAL are requested for public release pursuant to A.R.S. § 39-121 et seq., COUNTY shall release records marked CONFIDENTIAL ten (10) business days after the date of notice to the Contractor of the request for release, unless Contractor has, within the ten day period, secured a protective order, injunctive relief or other appropriate order from a court of competent jurisdiction, enjoining the release of the records. For the purposes of this paragraph, the day of the request for release shall not be counted in the time calculation. Contractor shall be notified of any request for such release on the same day of the request for public release or as soon thereafter as practicable.

COUNTY shall not, under any circumstances, be responsible for securing a protective order or other relief enjoining the release of records marked CONFIDENTIAL, nor shall COUNTY be in any way financially responsible for any costs associated with securing such an order.

**29. CUSTOM TOOLING, DOCUMENTATION AND TRANSITIONAL SUPPORT:**

Costs to develop all tooling and documentation, such as and not limited to dies, molds, jigs, fixtures, artwork, film, patterns, digital files, work instructions, drawings, etc. necessary to provide the contracted services or products and are unique to the services or products supplied to COUNTY are included in the agreed upon Unit Price unless specifically stated otherwise in the agreement. It is agreed that such tools and documentation are the property of COUNTY and shall be marked, as is practical, as the "Property of Pima County" and if requested by COUNTY a copy of the tooling and documentation shall be delivered to COUNTY within twenty days of acceptance by the COUNTY of the first article sample, or not later than ten days of termination of the agreement associated with their development, without additional cost to COUNTY. The Contractor also agrees to act in good faith to facilitate the transition of work to a subsequent Contractor if and as reasonably requested by COUNTY at no additional cost. Should exceptional circumstances be present that may justify an additional charge, the Contractor may submit said justification and proposed cost and negotiate an agreement acceptable to both Contractor and COUNTY, but Contractor may not withhold any requested

**PIMA COUNTY STANDARD TERMS AND CONDITIONS**

tooling, document or support as defined above that would delay the orderly, efficient and prompt transition of work. Should conduct by the Contractor result in additional costs to the COUNTY the Contractor agrees to reimburse the COUNTY for said actual and incremental costs provided that the COUNTY had given the Contractor reasonable time to respond to the COUNTY's requests for support.

**30. AMERICANS WITH DISABILITIES ACT:**

Contractor shall comply with all applicable provisions of the Americans with Disabilities Act (public law 101-336, 42 USC 12101-12213) and all applicable federal regulations under the act, including 28 CFR parts 35 and 36.

**31. NON-EXCLUSIVE:**

Agreements resulting from this solicitation are non-exclusive and are for the sole convenience of Pima County which reserves the right to obtain like goods and services from other sources for any reason.

**32. PROTESTS:**

An interested party may file a protest regarding any aspect of a solicitation, evaluation, or recommendation for award. Protests must be filed in accordance with the Pima County Procurement Code, Section 11.20.010.

**33. TERMINATION:**

COUNTY reserves the right to terminate any blanket contract, purchase order, contract or award, in whole or in part, at anytime, without penalty or recourse when in the best interests of the COUNTY, Upon receipt of written notice, Contractor shall immediately cease all work as directed by the notice, notify all sub-Contractor of the effective date of termination and take appropriate actions to minimize further costs to the COUNTY. In the event of termination under this paragraph, all documents, data, and reports prepared by the Contractor under the contract shall become the property of and be promptly delivered to the COUNTY. The Contractor shall be entitled to receive just and equitable compensation for work in progress, work completed and materials accepted before the effective date of the termination. The cost principles and procedures defined by A.A.C. R2-7-701 shall apply.

**34. ORDER OF PRECEDENCE-CONFLICTING DOCUMENTS:**

In the event that there are inconsistencies between agreement documents, following is the order of precedence, superior to subordinate, that shall be applied to resolve the inconsistency: blanket contract; purchase order; offer agreement or contract attached to a blanket contract or purchase order; standard terms and conditions; other solicitation documents.

**35. INDEPENDENT CONTRACTOR:**

The status of the Contractor shall be that of an independent Contractor. Neither Contractor nor Contractor officer's agents or employees shall be considered an employee of COUNTY or be entitled to receive any employment-related fringe benefits under the COUNTY Merit System. Contractor shall be responsible for payment of all federal, state and local taxes associated with the compensation received pursuant to this Contract and shall indemnify and hold

COUNTY harmless from any and all liability which COUNTY may incur because of Contractor's failure to pay such taxes. Contractor shall be solely responsible for program development and operation.

**36. BOOKS AND RECORDS:**

Contractor shall keep and maintain proper and complete books, records and accounts, which shall be open at all reasonable times for inspection and audit by duly authorized representatives of COUNTY. In addition, Contractor shall retain all records relating to this contract at least 5 years after its termination or cancellation or, if later, until any related pending proceeding or litigation has been closed.

**37. COUNTERPARTS:**

The blanket contract, purchase order or contract awarded pursuant to this solicitation may be executed in any number of counterparts and each counterpart shall be deemed an original, and together such counterparts shall constitute one and the same instrument. For the purposes of the blanket contract, purchase order or contract, the signed offer of Respondent and the signed acceptance of COUNTY shall each be deemed an original and together shall constitute a binding blanket contract, purchase order or contract, if all other requirements for execution have been met.

**38. AUTHORITY TO CONTRACT:**

Contractor warrants its right and power to enter into the blanket contract, purchase order or contract. If any court or administrative agency determines that COUNTY does not have authority to enter into the blanket contract, purchase order or contract, COUNTY shall not be liable to Contractor or any third party by reason of such determination or by reason of the blanket contract, purchase order or contract.

**PIMA COUNTY STANDARD TERMS AND CONDITIONS**

**39. FULL AND COMPLETE PERFORMANCE:**

The failure of either party to insist on one or more instances upon the full and complete performance with any of the terms or conditions of the blanket contract, purchase order or contract to be performed on the part of the other, or to take any action permitted as a result thereof, shall not be construed as a waiver or relinquishment of the right to insist upon full and complete performance of the same, or any other covenant or condition, either in the past or in the future. The acceptance by either party of sums less than may be due and owing it at any time shall not be construed as an accord and satisfaction.

**40. SUBCONTRACTOR:**

CONTRACTOR shall be fully responsible for all acts and omissions of any subcontractor and of persons directly or indirectly employed by any subcontractor, and of persons for whose acts CONTRACTOR may be liable to the same extent that the CONTRACTOR is responsible for the acts and omissions of persons directly employed by it. Nothing in this contract shall create any obligation on the part of COUNTY to pay or see to the payment of any money due any subcontractor, except as may be required by law.

**41. SEVERABILITY:**

Each provision of this Contract stands alone, and any provision of this Contract found to be prohibited by law shall be ineffective to the extent of such prohibition without invalidating the remainder of this Contract.

**42. LEGAL ARIZONA WORKERS ACT COMPLIANCE**

CONTRACTOR hereby warrants that it will at all times during the term of this Contract comply with all federal immigration laws applicable to CONTRACTOR's employment of its employees, and with the requirements of A.R.S. § 23-214 (A) (together the "State and Federal Immigration Laws"). CONTRACTOR shall further ensure that each subcontractor who performs any work for CONTRACTOR under this contract likewise complies with the State and Federal Immigration Laws.

COUNTY shall have the right at any time to inspect the books and records of CONTRACTOR and any subcontractor in order to verify such party's compliance with the State and Federal Immigration Laws.

Any breach of CONTRACTOR's or any subcontractor's warranty of compliance with the State and Federal Immigration Laws, or of any other provision of this section, shall be deemed to be a material breach of this Contract subjecting CONTRACTOR to penalties up to and including suspension or termination of this Contract. If the breach is by a subcontractor, and the subcontract is suspended or terminated as a result, CONTRACTOR shall be required to take such steps as may be necessary to either self-perform the services that would have been provided under the subcontract or retain a replacement subcontractor, as soon as possible so as not to delay project completion.

CONTRACTOR shall advise each subcontractor of COUNTY's rights, and the subcontractor's obligations, under this Article by including a provision in each subcontract substantially in the following form:

"SUBCONTRACTOR hereby warrants that it will at all times during the term of this contract comply with all federal immigration laws applicable to SUBCONTRACTOR's employees, and with the requirements of A.R.S. § 23-214 (A). SUBCONTRACTOR further agrees that COUNTY may inspect the SUBCONTRACTOR's books and records to insure that SUBCONTRACTOR is in compliance with these requirements. Any breach of this paragraph by SUBCONTRACTOR will be deemed to be a material breach of this contract subjecting SUBCONTRACTOR to penalties up to and including suspension or termination of this contract."

Any additional costs attributable directly or indirectly to remedial action under this Article shall be the responsibility of CONTRACTOR. In the event that remedial action under this Article results in delay to one or more tasks on the critical path of CONTRACTOR's approved construction or critical milestones schedule, such period of delay shall be deemed excusable delay for which CONTRACTOR shall be entitled to an extension of time, but not costs.

**END OF PIMA COUNTY STANDARD TERMS AND CONDITIONS (July 30, 2009)**

**SAMPLE CONTRACT**

<p><b>PIMA COUNTY DEPARTMENT OF HUMAN RESOURCES</b></p> <p><b>PROJECT: Life Insurance Benefits</b></p> <p><b>CONTRACTOR: [awardee legal name &amp; address]</b></p> <p><b>AMOUNT: \$[ ]</b></p> <p><b>FUNDING: General Funds and Employee Contributions]</b></p>	<p>(STAMP HERE)</p>
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**PROFESSIONAL SERVICES CONTRACT - Board of Supervisors**

THIS CONTRACT entered between Pima County, a body politic and corporate of the State of Arizona, hereinafter called COUNTY; and [Legal Name as documented by the ACC or sole proprietorship], hereinafter called CONTRACTOR.

WITNESSETH

WHEREAS, COUNTY requires the services of a CONTRACTOR to provide Life Insurance Benefits and

WHEREAS, consistent with Board of Supervisors Policy D29.6 CONTRACTOR submitted the most advantageous response to the Procurement Department to Solicitation for offer(s) dated [99/99/9999] titled Life Insurance Benefits No. 1000712 for said products and/or services.

NOW, THEREFORE, the parties hereto agree as follows:

**ARTICLE I - TERM AND EXTENSION/RENEWAL/CHANGES**

This Contract, as awarded by the Board Of Supervisors, shall commence on July 1st, 2010 and shall terminate on June 30<sup>th</sup>, 2011, unless sooner terminated or further extended pursuant to the provisions of this Contract. The parties may renew this Contract for up to four (4) additional one-year periods or any portion thereof.

Any modification, or extension of the contract termination date, shall be by formal written amendment executed by the parties hereto.

Amendments to the Contract must be approved by the Board of Supervisors or the Procurement Director, as required by the Pima County Procurement code, before any work or deliveries under the Amendment commences.

**ARTICLE II – SCOPE OF SERVICES**

This Contract establishes the agreement under which the CONTRACTOR will provide COUNTY with products and services in accordance with the attached Exhibit A: Scope of Services (one page).

CONTRACTOR shall provide COUNTY the goods and services as defined in this Contract. All goods and services shall comply with the requirements and specifications as called for in this Contract and solicitation documents contained or referenced in Pima County Solicitation No. 1000712, and [List other particular documents as/if appropriate]; these documents are incorporated into the Contract the same as set forth in full herein.

CONTRACTOR shall employ suitably trained and skilled professional personnel to perform all consultant services under this Contract. Prior to changing any key personnel, especially those key personnel COUNTY relied upon in making this Contract, CONTRACTOR shall obtain the approval of COUNTY. The key personnel include the following staff:

### ARTICLE III – COMPENSATION AND PAYMENT

In consideration for the goods and services specified in this Contract, the COUNTY agrees to pay CONTRACTOR in an amount not to exceed [xxxxxxxx sixty dollars (\$x,xxx,xxx.00)].

Pricing for work will be as set forth in Exhibit B: Premium Schedule (One Page).

Basic Life/AD&D (Rates) shall be paid by Pima County based on the number of eligible employees covered for the applicable period.

Premiums for Supplemental Accidental Death and Dismemberment and Supplemental Life Insurance will be paid by the employees covered and processed via payroll deduction. Payment shall be based on the number of enrolled employees per plan.

Employee Paid Supplemental Premium Costs shall be based on current enrollment and paid by the employee..

Although State and City sales tax are paid when applicable and invoiced, taxes should not be included in the unit price.

CONTRACTOR shall provide detailed documentation in support of requested payment. Payment requests shall assign all costs to items identified by Exhibit B.

It is the intention of both parties that pricing shall remain firm during the term of the contract. Price increases shall only be considered in conjunction with a renewal of the Contract. In the event that economic conditions are such that unit price increases are desired by the CONTRACTOR upon renewal of the Contract, CONTRACTOR shall submit a written request to COUNTY with supporting documents justifying such increases at least 90 days prior to the termination date of the Contract. It is agreed that the Unit Prices shall include compensation for the CONTRACTOR to implement and actively conduct cost and price control activities. COUNTY will review the proposed pricing and determine if it is in the best interest of COUNTY to renew or extend the Contract as provided for in Article I of this Contract.

CONTRACTOR shall not provide goods and services in excess of the Exhibit A Line Item and Contract Amounts without prior authorization by an amendment executed by COUNTY. Goods and Services provided in excess of Line Item or Contract Total Amounts without prior authorization by fully executed amendment shall be at CONTRACTOR'S own risk.

For the period of record retention required under Article XXI, COUNTY reserves the right to question any payment made under this Article and to require reimbursement therefore by setoff or otherwise for payments determined to be improper or contrary to the contract or law.

### ARTICLE IV - INSURANCE

CONTRACTOR shall obtain and maintain at its own expense, during the entire term of this Contract the following type(s) and amounts of insurance:

- a) Commercial General Liability in the amount of \$1,000,000.00 combined single limit Bodily Injury and Property Damage. Pima County is to be named as an additional insured for all operations performed within the scope of the Contract between Pima County and CONTRACTOR;
- b) Commercial or Business automobile liability coverage for owned, non-owned and hired vehicles used in the performance of this Contract with limits in the amount of \$1,000,000.00 combined single limit or \$1,000,000.00 Bodily Injury, \$1,000,000.00 Property Damage;
- c) If this Contract involves professional services, professional liability insurance in the amount of \$1,000,000.00; and,
- d) If required by law, workers' compensation coverage including employees' liability coverage.

CONTRACTOR shall provide COUNTY with current certificates of insurance. All certificates of insurance must provide for guaranteed thirty (30) days written notice to the COUNTY of cancellation, non-renewal or material change.

#### **ARTICLE V - INDEMNIFICATION**

CONTRACTOR shall indemnify, defend, and hold harmless COUNTY, its officers, employees and agents from and against any and all suits, actions, legal administrative proceedings, claims or demands and costs attendant thereto, arising out of any act, omission, fault or negligence by the CONTRACTOR, its agents, employees or anyone under its direction or control or on its behalf in connection with performance of this Contract.

CONTRACTOR warrants that all products and services provided under this contract are non-infringing. CONTRACTOR will indemnify, defend and hold COUNTY harmless from any claim of infringement arising from services provided under this contract or from the provision, license, transfer or use for their intended purpose of any products provided under this Contract.

#### **ARTICLE VI - COMPLIANCE WITH LAWS**

CONTRACTOR shall comply with all federal, state, and local laws, rules, regulations, standards and Executive Orders, without limitation to those designated within this Contract. The laws and regulations of the State of Arizona shall govern the rights of the parties, the performance of this Contract, and any disputes hereunder. Any action relating to this Contract shall be brought in a court of the State of Arizona in Pima County. Any changes in the governing laws, rules, and regulations during the terms of this Contract shall apply, but do not require an amendment.

#### **ARTICLE VII - INDEPENDENT CONTRACTOR**

The status of the CONTRACTOR shall be that of an independent contractor. Neither CONTRACTOR, nor CONTRACTOR'S officer's agents or employees shall be considered an employee of Pima County or be entitled to receive any employment-related fringe benefits under the Pima County Merit System. CONTRACTOR shall be responsible for payment of all federal, state and local taxes associated with the compensation received pursuant to this Contract and shall indemnify and hold COUNTY harmless from any and all liability which COUNTY may incur because of CONTRACTOR'S failure to pay such taxes. CONTRACTOR shall be solely responsible for program development and operation.

#### **ARTICLE VIII - SUBCONTRACTOR**

CONTRACTOR will be fully responsible for all acts and omissions of any subcontractor and of persons directly or indirectly employed by any subcontractor and of persons for whose acts any of them may be liable to the same extent that the CONTRACTOR is responsible for the acts and omissions of persons directly employed by it. Nothing in this contract shall create any obligation on the part of COUNTY to pay or see to the payment of any money due any subcontractor, except as may be required by law.

#### **ARTICLE IX - ASSIGNMENT**

CONTRACTOR shall not assign its rights to this Contract, in whole or in part, without prior written approval of the COUNTY. Approval may be withheld at the sole discretion of COUNTY, provided that such approval shall not be unreasonably withheld.

#### **ARTICLE X - NON-DISCRIMINATION**

CONTRACTOR shall not discriminate against any COUNTY employee, client or any other individual in any way because of that person's age, race, creed, color, religion, sex, disability or national origin in the course of carrying out CONTRACTOR'S duties pursuant to this Contract. CONTRACTOR shall comply with the provisions of Executive Orders 75-5, as amended by Executive Order 99-4, which are incorporated into this Contract by reference as if set forth in full herein.

#### **ARTICLE XI - AMERICANS WITH DISABILITIES ACT**

CONTRACTOR shall comply with all applicable provisions of the Americans with Disabilities Act (Public Law 101-336, 42 U.S.C. 12101-12213) and all applicable federal regulations under the Act, including 28 CFR Parts 35 and 36.

#### **ARTICLE XII - AUTHORITY TO CONTRACT**

CONTRACTOR warrants its right and power to enter into this Contract. If any court or administrative agency determines that COUNTY does not have authority to enter into this Contract, COUNTY shall not be liable to CONTRACTOR or any third party by reason of such determination or by reason of this Contract.

### **ARTICLE XIII - FULL AND COMPLETE PERFORMANCE**

The failure of either party to insist on one or more instances upon the full and complete performance with any of the terms or conditions of this Contract to be performed on the part of the other, or to take any action permitted as a result thereof, shall not be construed as a waiver or relinquishment of the right to insist upon full and complete performance of the same, or any other covenant or condition, either in the past or in the future. The acceptance by either party of sums less than may be due and owing it at any time shall not be construed as an accord and satisfaction.

### **ARTICLE XIV - CANCELLATION FOR CONFLICT OF INTEREST**

This Contract is subject to cancellation for conflict of interest pursuant to ARS § 38-511, the pertinent provisions of which are incorporated into this Contract by reference.

### **ARTICLE XV - TERMINATION**

COUNTY reserves the right to terminate this Contract at any time and without cause by serving upon CONTRACTOR 30 days advance written notice of such intent to terminate. In the event of such termination, the COUNTY'S only obligation to CONTRACTOR shall be payment for services rendered prior to the date of termination.

This Contract may be terminated at any time without advance notice and without further obligation to the COUNTY when the CONTRACTOR is found by COUNTY to be in default of any provision of this Contract.

Notwithstanding any other provision in this Contract, this Contract may be terminated if for any reason, there are not sufficient appropriated and available monies for the purpose of maintaining COUNTY or other public entity obligations under this Contract. In the event of such termination, COUNTY shall have no further obligation to CONTRACTOR, other than to pay for services rendered prior to termination.

### **ARTICLE XVI - NOTICE**

Any notice required or permitted to be given under this Contract shall be in writing and shall be served by personal delivery or by certified mail upon the other party as follows:

COUNTY:  
Pima County Human Resources  
Gwyn Hatcher, Director  
150 W. Congress, 4<sup>th</sup> Floor  
Tucson, Az 85701

CONTRACTOR:  
[Name, legal address, fax/phone of  
Contractor Officer submitting bid]

### **ARTICLE XVII - NON-EXCLUSIVE CONTRACT**

CONTRACTOR understands that this Contract is nonexclusive and is for the sole convenience of COUNTY. COUNTY reserves the right to obtain like services from other sources for any reason.

### **ARTICLE XVIII - OTHER DOCUMENTS**

CONTRACTOR and COUNTY in entering into this Contract have relied upon information provided in the Pima County Solicitation No. 1000712 including the Requests for proposals, Instructions to Bidders, Standard Terms and Conditions, Specific Terms and Conditions, Solicitation Addenda, CONTRACTOR'S Proposal and on other information and documents submitted by the CONTRACTOR in its' response to Solicitation No. 1000712 These documents are hereby incorporated into and made a part of this Contract as if set forth in full herein, to the extent not inconsistent with the provisions of this contract.

### **ARTICLE XIX - REMEDIES**

Either party may pursue any remedies provided by law for the breach of this Contract. No right or remedy is intended to be exclusive of any other right or remedy and each shall be cumulative and in addition to any other right or remedy existing at law or at equity or by virtue of this Contract.

## **ARTICLE XX - SEVERABILITY**

Each provision of this Contract stands alone, and any provision of this Contract found to be prohibited by law shall be ineffective to the extent of such prohibition without invalidating the remainder of this Contract.

## **ARTICLE XXI - BOOKS AND RECORDS**

CONTRACTOR shall keep and maintain proper and complete books, records and accounts, which shall be open at all reasonable times for inspection and audit by duly authorized representatives of COUNTY.

In addition, CONTRACTOR shall retain all records relating to this contract at least 5 years after its termination or cancellation or, if later, until any related pending proceeding or litigation has been closed.

## **ARTICLE XXII – PUBLIC INFORMATION**

Pursuant to A.R.S. § 39-121 et seq., and A.R.S. § 34-603(G) in the case of construction or Architectural and Engineering services procured under A.R.S. Title 34, Chapter 6, all information submitted in response to this solicitation, including, but not limited to, pricing, product specifications, work plans, and any supporting data becomes public information and upon request, is subject to release and/or review by the general public including competitors.

Any records submitted in response to this solicitation that respondent believes constitute proprietary, trade secret or otherwise confidential information must be appropriately and prominently marked as CONFIDENTIAL by respondent prior to the close of the solicitation.

Notwithstanding the above provisions, in the event records marked CONFIDENTIAL are requested for public release pursuant to A.R.S. § 39-121 et seq., County shall release records marked CONFIDENTIAL ten (10) business days after the date of notice to the respondent of the request for release, unless respondent has, within the ten day period, secured a protective order, injunctive relief or other appropriate order from a court of competent jurisdiction, enjoining the release of the records. For the purposes of this paragraph, the day of the request for release shall not be counted in the time calculation. Respondent shall be notified of any request for such release on the same day of the request for public release or as soon thereafter as practicable.

County shall not, under any circumstances, be responsible for securing a protective order or other relief enjoining the release of records marked CONFIDENTIAL, nor shall County be in any way financially responsible for any costs associated with securing such an order.

## **ARTICLE XXIII – LEGAL ARIZONA WORKERS ACT COMPLIANCE**

CONTRACTOR hereby warrants that it will at all times during the term of this Contract comply with all federal immigration laws applicable to CONTRACTOR'S employment of its employees, and with the requirements of A.R.S. § 23-214 (A) (together the "State and Federal Immigration Laws"). CONTRACTOR shall further ensure that each subcontractor who performs any work for CONTRACTOR under this contract likewise complies with the State and Federal Immigration Laws.

COUNTY shall have the right at any time to inspect the books and records of CONTRACTOR and any subcontractor in order to verify such party's compliance with the State and Federal Immigration Laws.

Any breach of CONTRACTOR'S or any subcontractor's warranty of compliance with the State and Federal Immigration Laws, or of any other provision of this section, shall be deemed to be a material breach of this Contract subjecting CONTRACTOR to penalties up to and including suspension or termination of this Contract. If the breach is by a subcontractor, and the subcontract is suspended or terminated as a result, CONTRACTOR shall be required to take such steps as may be necessary to either self-perform the services that would have been provided under the subcontract or retain a replacement subcontractor, as soon as possible so as not to delay project completion.

CONTRACTOR shall advise each subcontractor of COUNTY'S rights, and the subcontractor's obligations, under this Article by including a provision in each subcontract substantially in the following form:

"SUBCONTRACTOR hereby warrants that it will at all times during the term of this contract comply with all federal immigration laws applicable to SUBCONTRACTOR's employees, and with the requirements of A.R.S. § 23-214 (A). SUBCONTRACTOR further agrees that COUNTY may inspect the SUBCONTRACTOR'S books and records to insure that SUBCONTRACTOR is in compliance with these requirements. Any breach of this paragraph by SUBCONTRACTOR

will be deemed to be a material breach of this contract subjecting SUBCONTRACTOR to penalties up to and including suspension or termination of this contract.”

Any additional costs attributable directly or indirectly to remedial action under this Article shall be the responsibility of CONTRACTOR. In the event that remedial action under this Article results in delay to one or more tasks on the critical path of CONTRACTOR’s approved construction or critical milestones schedule, such period of delay shall be deemed excusable delay for which CONTRACTOR shall be entitled to an extension of time, but not costs.

**ARTICLE XXIV – SCRUTINIZED BUSINESS OPERATIONS**

“Pursuant to A.R.S. §§ 35-391.06 and 393.06, contractor hereby certifies that it does not have scrutinized business operations in Iran or Sudan. The submission of a false certification by contractor may result in action up to and including termination of this contract.

**ARTICLE XXV - ENTIRE AGREEMENT**

This document constitutes the entire agreement between the parties pertaining to the subject matter hereof, and all prior or contemporaneous agreements and understandings, oral or written, are hereby superseded and merged herein. This Contract may be modified, amended, altered or extended only by a written amendment signed by the parties.

IN WITNESS THEREOF, the parties have affixed their signatures to this Contract on the date written below.

**PIMA COUNTY**

**CONTRACTOR**

\_\_\_\_\_  
Chair, Board of Supervisors

\_\_\_\_\_  
Authorized Officer Signature

Date: \_\_\_\_\_

\_\_\_\_\_  
Printed Name and Title

Date: \_\_\_\_\_

**ATTEST**

\_\_\_\_\_  
Clerk of Board

Date: \_\_\_\_\_

**APPROVED AS TO FORM**

\_\_\_\_\_  
Deputy County Attorney

Date: \_\_\_\_\_

**APPROVED AS TO CONTENT**

\_\_\_\_\_  
Department Head

\_\_\_\_\_  
Date

**EXHIBIT A: SCOPE OF SERVICES** (One Page)

CONTRACTOR shall administer a Life Insurance Program for Life Insurance, Accidental Death & Dismemberment and Supplemental Life Insurance for Pima County employees and their dependents and in so doing, perform the following duties:

1. Provide COUNTY with advance written notice of any change in premium structure. COUNTY shall receive such notification within the specified time frame as agreed to by CONTRACTOR and COUNTY, but not less than 180 days before contract expiration date. Notification to employees shall be in the form approved by the County.
2. Provide for all brochures, applications, enrollment and change forms at the expense of CONTRACTOR. COUNTY shall bear no financial responsibility for the cost of printing such brochures, applications, enrollment and/or change forms.
3. Process employee requests to convert group term life coverage to an individual whole life policy when appropriate application for it is provided to CONTRACTOR within the time period designated for such conversion in the Policy.
4. Process employee claims for waiver of life insurance premium while the employee is totally disabled, provided that employee submits the appropriate application for waiver of premium form within the time period designated for such in Policy.
5. Notify COUNTY of any problem with an employee and/or dependent or payroll center that CONTRACTOR is unable to resolve.
6. Notify COUNTY of any appeal and/or claims made by an employee/individual directed to the Arizona Department of Insurance. Such notice shall be provided within fourteen (14) calendar days following the date of CONTRACTOR'S response and shall include the specific nature of the problem and the resolution to the Arizona Department of Insurance.

COUNTY shall perform the following duties:

1. Provide CONTRACTOR with a list of eligible individuals.
2. Promote the Plan to all eligible employees during new employee orientation briefings and coordinate an annual promotion for the Plan.
3. Assist CONTRACTOR with problems relative to eligibility for the Plan.
4. Perform the following administrative functions:
  - 4a. Make the designated employee payroll deductions provided on the payroll transmittal for each payroll of the month.
  - 4b. Process any refund credit as requested by the CONTRACTOR and verified by COUNTY
  - 4c. Forward the premium payment for active employees (equal to the monthly premium billing for all coverage in force) to CONTRACTOR.
5. Promptly research and resolve problems brought to the COUNTY'S attention by CONTRACTOR. Types of problems include payroll deduction errors, untimely premium payment, and inability to obtain eligibility lists, etc.
6. Provide eligible members with Contractor provided forms ie portability, conversion, waiver,.
7. Complete and submit to CONTRACTOR required documentation for disability, accelerated benefit or death claims

**TRANSITION:**

At the termination of this agreement, should a different contractor be selected to provide these services, a coordination team may be formed to plan and manage those actions required to achieve smooth, efficient and orderly transition and provision of services from the current to the subsequent service provider. This team will consist of competent representatives, as determined by the COUNTY, the CONTRACTOR, and the subsequent contractor. CONTRACTOR shall participate and cooperate with the COUNTY and subsequent contractor to transition these services as required to avoid and minimize the frequency, and duration of any preventable service interruptions and costs.

**END OF EXHIBIT A**

**Exhibit B - PREMIUM SCHEDULE (TWO PAGES)**ALL PLANS MUST BE PRICED AND PROPOSED.

No guarantee of any specific amount of supplemental insurance business is implied or guaranteed.

ITEM #	Plan #	Current # of Insured	Premium/Rate	Total Price Proposed for Plan 1
1	<b>Plan 1:</b> Basic Life Insurance including AD&D: Bi-Weekly rate for \$10,000.00 of Basic Life Insurance, including \$10,000.00 AD&D	6185	\$	\$
	<b>Plan 2:</b> Supplemental Life Insurance: Bi-Weekly Rate per \$1,000.00	<b>Current # of Insured</b>	<b>Premium/Rate</b>	<b>Extended Amount</b>
2	Under Age 25	131	\$	\$
3	Ages 25 through 29	268	\$	\$
4	Ages 30 through 34	406	\$	\$
5	Ages 35 through 39	466	\$	\$
6	Ages 40 through 44	552	\$	\$
7	Ages 45 through 49	660	\$	\$
8	Age 50 through 54	736	\$	\$
9	Ages 55 through 59	575	\$	\$
10	Ages 60 through 64	300	\$	\$
11	Ages 65 through 69	72	\$	\$
12	Ages 70 through 74	5	\$	
13	Ages 75 and over	1	\$	\$
			<b>Total Price Proposed for Plan 2</b>	
	<b>Plan 3:</b>	<b>Current # of Insured</b>	<b>Premium/Rate</b>	<b>Extended Amount</b>
14	<b>Plan 3:</b> AD&D Insurance: Bi-Weekly Rate per \$1,000.00 (employees only)	1306	\$	\$
15	<b>Plan 3:</b> AD&D Insurance Rate and Dependents AD&D rate (employees and family members): Bi-Weekly Rate per \$1,000.00 (employees and family members)	1882	\$	\$
			<b>Total Price Proposed. For Plan 3</b>	\$
	<b>Plan 4:</b>	<b>Current # of Insured</b>	<b>Premium/Rate</b>	<b>Total Price Proposed for Plan 4</b>
16	<b>Plan 4:</b> Dependent Life insurance: Bi-Weekly Rate per member regardless of number of insured dependents	2814	\$	\$

**SUMMARY**

<b>TOTAL PRICE PROPOSED FOR PLAN 1</b>	<b>\$</b>
<b>TOTAL PRICE PROPOSED FOR PLAN 2</b>	<b>\$</b>
<b>TOTAL PRICE PROPOSED FOR PLAN 3</b>	<b>\$</b>
<b>TOTAL PRICE PROPOSED FOR PLAN 4</b>	<b>\$</b>

**Exhibit B - PREMIUM SCHEDULE (TWO PAGES)**

Pima County self bills based on current enrollment. Invoices are generated monthly; however, payment is disbursed after every other bi-weekly payroll cycle.

The successful contractor shall at a minimum hold the rates submitted for the entire one-year period of the contract. Rate increases may be requested prior to any renewal or extension period. Any requested rate increase must be submitted to the County 180 days prior to any renewal or extension date. Pima County will review the request and will either accept or deny. If denied, the County will re-solicit bids. Rates provided shall be effective July 01, 2010.

**OPTIONAL EARLY PAYMENT DISCOUNT TERM:** Standard payment terms for the pricing defined by this agreement are Net 30 days after submittal of valid invoice document to County Finance and receipt of goods into payment system by the receiving Department. Pima County Administrative Procedure No. 22-35, section II.B.4 defines the County's practice regarding discounts for early payment. Supplier hereby offers the following discounts to those prices to be used for all orders issued pursuant to this agreement. County will utilize the existing payment code that best matches that offered and does not exceed the offered discount percentage. Payment days cannot be less than ten calendar days. Supplier shall submit valid invoice document consistent with the associated purchase order to County Finance Department at least seven (7) calendar days prior to the date on which the discounted payment is due.

Standard Early Payment Discount Percent: \_\_\_\_\_% if payment tendered within \_\_\_\_\_ Days as above

If desired, for any order issued pursuant with this agreement, the Supplier may offer early payment discounts that exceed this Standard Early Payment Discount.

**8. TAXES, FEES, EXPENSES:**

Articles sold to Pima County are exempt from federal excise taxes. The County is subject to State and City sales tax. Posada Del Sol is exempt from all taxes as provided in A.R.S. § 42-1321 and Arizona State Revenue Code #R-15-5-2320. Pima County will furnish an exemption certificate upon request. No separate charges for delivery, sales tax, drayage, express, parcel post, packing, insurance, license fees, permits, costs of bonds, surcharges, or proposal preparation, will be paid by Pima County, unless expressly included and itemized by the solicitation documents.

Submitted by (Printed name/Title)\_\_\_\_\_ Initials\_\_\_\_\_ Date\_\_\_\_\_

End of Exhibit B

**FORM #1: CERTIFICATION**

**ACKNOWLEDGEMENT of SOLICITATION ADDENDA:**

Offeror acknowledges that the following solicitation addenda has been incorporated in their offer and this agreement:

Addendum #	Date	Addendum #	Date	Addendum #	Date

**PROPOSAL/OFFER CERTIFICATION:**

OFFEROR LEGAL NAME: \_\_\_\_\_

BUSINESS ALSO KNOWN AS: \_\_\_\_\_

MAILING ADDRESS: \_\_\_\_\_

CITY/STATE/ZIP: \_\_\_\_\_

REMIT TO ADDRESS: \_\_\_\_\_

CITY/STATE/ZIP: \_\_\_\_\_

CONTACT PERSON NAME/TITLE: \_\_\_\_\_

PHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

CONTACT EMAIL ADDRESS: \_\_\_\_\_

E-MAIL ADDRESS TO WHICH ORDERS CAN BE TRANSMITTED: \_\_\_\_\_

**CORPORATE HEADQUARTERS LOCATION:**

ADDRESS: \_\_\_\_\_

CITY, STATE, ZIP: \_\_\_\_\_

By signing and submitting these bid offer, the undersigned certifies that they are legally authorized to represent and bind the "Supplier" to legal agreements, that all information submitted is accurate and complete, that the firm has reviewed the Procurement website for solicitation addenda and incorporated to their offer, that the firm is qualified and willing to provide the items requested, and that the firm will comply with all requirements of the solicitation. The undersigned hereby offers to furnish the material or service in compliance with all terms, conditions, specifications, defined or referenced by the solicitation, which includes but may not be limited to the Standard Terms & Conditions, and this Offer Agreement. The Unit Pricing includes all costs incidental to the provision of the items in compliance with the above documents; no additional payment will be made. Conditional offers that modify the solicitation requirements may be deemed not 'responsive' and may not be evaluated.

The resulting contract incorporates by reference all requirements set forth by the solicitation, solicitation instructions, Pima County standard terms and conditions, and other documents listed in the Sample Contract's Other Documents article.

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

\_\_\_\_\_  
PRINTED NAME & TITLE OF AUTHORIZED OFFEROR REPRESENTATIVE EXECUTING OFFER

PHONE AND E-MAIL: \_\_\_\_\_

**END OF CERTIFICATION FORM**

**FORM 2: MINIMUM QUALIFICATIONS VERIFICATION FORM (1 PAGE)**

OFFEROR'S NAME: \_\_\_\_\_

Offeror certifies that they possess the following minimum qualifications and shall provide the requested documents that substantiate their satisfaction of the Minimum Qualifications. Failure to provide the information required by these Minimum Qualifications and required to substantiate *responsibility* may be cause for the offeror's proposal to be rejected as **Non-Responsive**.

Provide documented and verifiable evidence that your firm satisfies the following Minimum Qualifications, and indicate what/if attachments are submitted.

ITEM NO.	MINIMUM QUALIFICATIONS	COMPLIANCE YES/NO (SELECT ONE)	DOCUMENT TITLE AND NUMBER OF PAGES SUBMITTED FOR EACH DOCUMENT
1.	Company issuing policies must have at a minimum an AM Best Rating of A. Provide clear and concise evidence that your firm meets this rating.	Yes ___ No ___	
2.	Life Insurance must include at a minimum all the coverage's, definitions of eligibility, guarantee issues, waiver of premium definition, exclusions, limitations and any and all terms and conditions currently specified in the in force contract cover the County employees, family members, and dependents for all four plans as specified on the Certificates of Insurance located at <a href="http://www.pima.gov/hr/EmployeeBenefits/lifeins.htm">http://www.pima.gov/hr/EmployeeBenefits/lifeins.htm</a>  Provide clear and concise evidence that your program meets all these requirements	Yes ___ No ___	
3.	Company and Account Manager must be licensed by the Arizona Department of Insurance.  Provide clear and concise evidence that your Company and Account Manager are licensed by the State of Arizona.	Yes ___ No ___	
4.	Company must have at least three public sector clients insuring lives in excess of 10,000.  Submit Form #4 – Reference to substantiate your Company meets this requirement.	Yes ___ No ___	

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

PRINTED NAME &amp; TITLE OF AUTHORIZED OFFEROR REPRESENTATIVE EXECUTING OFFER \_\_\_\_\_

**FORM 3: QUESTIONNAIRE (2 PAGES)****OFFEROR'S NAME:** \_\_\_\_\_

This Questionnaire is divided into five sections based on the Evaluation Criteria contained in Section 5. **EVALUATION AND AWARD CRITERIA** of Instructions to Offerors. The evaluation committee will assign points to each proposal submitted on the basis of the following evaluation criteria unless otherwise indicated.

**A. Cost (0 to 50 points)**

- 1) Will you offer a rate guarantee through year 5 of the contract? If not, please detail any rate guarantees you will offer.
- 2) Complete and submit Exhibit B – Premium Schedule.  
Plan 1: Basic Life (including AD&D at like amount) --employee coverage 30 points available  
Plan 2: Supplemental Life – employee coverage available – 10 points available  
Plan 3: Supplemental AD&D – employee only or employee and family coverage available – 5 points available  
Plan 4: Dependent Life – spouse/domestic partner and/or dependent children coverage available – 5 points available

**B. Company Experience (0 to 10 points)**

- 1) How many agreements has your firm completed as a contractor for the past 3 years for identical or similar projects described in this solicitation? Please include each agreement description, dollar amount, and verifiable information.
- 2) How successful is the general history of your firm in completing similar projects on time and within budget? Include and provide historical data.
- 3) What are your company's rates of approval/declination for requests to increase coverage during Open Enrollment periods? Include historical data or certification.
- 4) What is the average turn time for processing claims?
- 5) What is approval rating for claims and underwriting?
- 6) Is Dependent coverage included when the member is approved for a Waiver of Premium?
- 7) When the Waiver of Premium ends or is not approved, does the insurance company send a conversion form to the member?
- 8) What reports are in place to verify claim status? Are these reports available electronically?
- 9) In what circumstances will Pima County receive copies of correspondence sent to the member?
- 11) If a subcontractor will perform the work on the project, include and provide full details.

**C. Key Personnel (0 to 10 points)**

- 1) Submit resumes of all proposed key personnel who will be performing services under the contract. Experience narratives shall be attached that describe the **specific relevant experience** of the key personnel in relation to the role that personnel will perform for this contract.
- 2) Identify key personnel special competencies that will be valuable in completing the contract. Include and provide copy of certification or other professional credential.
- 3) Identify any of your firm's personnel who have worked in the local area previously.
- 4) If a subcontractor will perform the work on the project, include and provide full details as indicated above.

**FORM 3: QUESTIONNAIRE (2 PAGES)**

**D. Project Plan/Ease of Implementation (0 to 15 points)**

1) Offeror shall provide a thorough project plan to include a milestone chart including implementation tasks to be performed, the time frame and proposed staff member designated for the completion of each task.

2) Provide detail of any extra benefits, if any, which will be offered to Pima County employees at no cost

**E. References (0 to 10 points)**

To be provided by offeror's clients.

**F. Sustainability Practices (0 to 5 points)**

**Questions pertaining to Sustainability Practices:**

1. Does your Company have a philosophy and/or policies on waste prevention, reduction, recycling and/or reuse of your Company's material resources. **Yes** \_\_\_\_ **No** \_\_\_\_

If you have an established Company Environmental Policy, you may attach in addition to your response to this item.

2. Does your Company utilize alternative energy such as solar or wind energy, and use of bio-diesel or other alternative fuels in support of your Company's energy needs? **Yes** \_\_\_\_ **No** \_\_\_\_

3. Does your Company utilize environmentally preferable materials in your Company's operations, including purchase of locally produced/manufactured products to minimize transport? **Yes** \_\_\_\_ **No** \_\_\_\_

4. Does your Company have internal office practices that lessen impact on non-renewable resources and global climate change (reduction in water, energy, or paper use, minimization of hazardous materials use, compressed or flexible work week schedules, etc.) **Yes** \_\_\_\_ **No** \_\_\_\_

5. Provide any other elements of your Company for the County's consideration that may fall within the definition of sustainable practice. Such elements include but are not limited to: resource extraction and manufacturing processes utilized; distance and type of transportation required; life-cycle costs; amount of waste generated; the recyclable content of the product, the product's capacity to be recycled or reused, and the product and packaging "take-back" policies of the manufacturer or distributor; energy and water efficiency; socioeconomic benefits to Pima County which may include preference to firms that are located within Pima County.

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

\_\_\_\_\_  
PRINTED NAME & TITLE OF AUTHORIZED OFFEROR REPRESENTATIVE EXECUTING OFFER

**END OF FORM 3**

**FORM 4: REFERENCE FORM (TWO PAGES)**

**PLEASE COMPLETE EACH AND EVERY SECTION.**

Name of Vendor for whom reference is given: \_\_\_\_\_

Your organization's business name: \_\_\_\_\_

Your Name and title: \_\_\_\_\_

Telephone number: \_\_\_\_\_ E-Mail address: \_\_\_\_\_

- Does the Vendor currently provide your organization with Life Insurance Benefits and for how many years?

Yes  Service was provided from \_\_\_\_\_ to \_\_\_\_\_  
 (MO/YR) (MO/YR)

No

- Please briefly describe the scope of service and dollar value of the contract with Vendor:

\_\_\_\_\_  
 \_\_\_\_\_

- Did Vendor meet all contract requirements satisfactorily: Yes  No

- How satisfied are you with the quality and accuracy of information provided by Vendor?

\_\_\_\_\_  
 \_\_\_\_\_

**PLEASE RATE THE FOLLOWING ITEMS (circle one):**

	<i>Unsatisfactory</i>	<i>Below Average</i>	<i>Average</i>	<i>Above Average</i>	<i>Exceptional</i>
1. Communications with Vendor:	0	1	2	3	4
Comments:	_____				
2. Understanding of contractual requirements:	0	1	2	3	4
Comments:	_____				
3. Completing projects on time and within budget:	0	1	2	3	4
Comments:	_____				
4. Vendor knowledge of Life Insurance services:	0	1	2	3	4
Comments:	_____				
5. Vendor's record keeping and billing accuracy	0	1	2	3	4
Comments:	_____				

**FORM 4: REFERENCE FORM (continued)**

Name of Vendor for whom reference is given: \_\_\_\_\_

PLEASE RATE THE FOLLOWING ITEMS (circle one):

		<i>Below</i>		<i>Above</i>	
	<i>Unsatisfactory</i>	<i>Average</i>	<i>Average</i>	<i>Average</i>	<i>Exceptional</i>

6. Vendor's responsiveness and success at addressing problems that arise:	0	1	2	3	4
Comments: _____					

7. Competence of professional services staff.	0	1	2	3	4
Comments: _____					

8. Overall satisfaction with Vendor.	0	1	2	3	4
Comments: _____					

9. What are their strengths as an Insurance Service Provider?  
\_\_\_\_\_

10. What are their drawbacks as an Insurance Service provider?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

11. Do you find the Vendor's underwriting guidelines to be fair and equitable?  
\_\_\_\_\_  
\_\_\_\_\_

12. Any other information that you would like to share about the Vendor:  
\_\_\_\_\_  
\_\_\_\_\_

Your Signature: \_\_\_\_\_

Please return this form to: \_\_\_\_\_ by this date and time:

Thank you for your time. Your cooperation is sincerely appreciated.

**END OF FORM 4**