



PURCHASING AND SUPPLY SERVICES

Keith Stewart, Director | keith.stewart@pgcps.org
13300 Old Marlboro Pike | Upper Marlboro, MD 20772 | 301-952-6560

ADDENDUM NO. 1

CONTRACT NUMBER ADDENDUM NO. 1

ISSUED BY: PRINCE GEORGE’S COUNTY PUBLIC SCHOOLS OFFICE OF PURCHASING AND SUPPLY 13300 OLD MARLBORO PIKE ROOM 20 UPPER MARLBORO, MARYLAND 20772-9983	Date of this Addendum: February 7, 2023 No. of Pages: 11	Proposal Submissions: February 16, 2023 (2:00 PM) EST
	RFP No.: PUR-007-23	RFP Issuance Date: January 13, 2023
	TITLE: Health and Wellness Benefit Consulting Services	

TO ALL PROSPECTIVE OFFERORS AND OTHER RECIPIENTS OF SOLICITATION DOCUMENTS

This Addendum is hereby made a part of the Contract Document which will be the basis of a Contract. This Addendum is issued to modify the original Solicitation Documents issued December 15, 2022. Prospective Offerors are requested to attach this Addendum to your Contract Documents. Receipt of this Addendum must be acknowledged in the Proposal Document (see Appendix G). Failure to do so may subject the Offerors disqualification.

THE PURPOSE OF THIS ADDENDUM IS TO:

- A. Extend the deadline date for proposal submissions to:** February 16, 2023, at 2:00 p.m.
- B. Modify the RFP PUR-007-23 in accordance with the following:**

Add: Part IV, Section 9.0 MBE REQUIREMENTS

Offerors shall indicate in Volume III – MBE Proposal its MBE Subcontracting Plan to meet the 15% MBE goal indicated in the RFP. The MBE Subcontracting Plan shall include the following:

- Subcontractor Name and Address and Telephone Number
- Subcontractor MBE Certification Number (if available)
- Percentage of the work to be subcontracted to the MBE

The MBE Subcontracting Plan should not provide any pricing information. Offerors that meet or exceed the MBE goal will have the opportunity to earn up to 5 bonus points.

Offerors shall also submit Attachment 1 Minority Utilization Form only in Volume III – MBE Proposal. Please see the below link:

<https://www.pgcps.org/offices/general-counsel/administrative-procedures/3000---business--non-instructional-operations/ap-3325---minority-business-enterprise-procurement-procedures>



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Revise: Part V, EVALUATION CRITERIA

Scoring - 100 points

Renewal, Rate Setting, Budget approach, Actuarial Support
RFP Support
Medical and Pharmacy Solutions (active and retired)
Audits/BenchMarking
Other Consulting Support
Questionnaire Response

Weighting

Technical Response: 65 Points
MBE Bonus Points: 5 Bonus Points
Pricing: 35 Points

C. Provide Responses to Questions as follows:

Questions and Responses

1. What is motivating this RFP for Health and Benefits services including purpose and goal?
Answer: PGCPS is currently riding Benefit Consultant contract entered into by another Public Employer in the State of Maryland. It is our desire to enter into our own contract rather than riding that of another jurisdiction.
2. Are there specific targets PGCPS needs to meet for its benefits programs? e.g. cost savings, enrollment in certain programs, absence management/employee productivity measures?
Answer: No specific targets that we expect prospective vendors to address at this time. For the purpose of this solicitation, we are interested in evaluating capabilities of vendors to assist with strategic goal setting going forward.
3. On a scale of 1 to 10 (ten being highest), how well do you think employees understand PGCPS's benefits/total rewards programs?
Answer: As with most public employers, the level of understanding of benefits varies across the workforce. Education opportunities are always evolving and it is expected that the successful vendor will work with the Benefits Team to continue improving communications.
4. What do you not have today that would be valued?
Answer: There are no specific deliverables or programs that vendors need to pitch in response to this RFP. Our evaluation will be specific to the scope of services requested.
5. How would PGCPS describe their employee value proposition?
Answer: Our employees are our number one resource, and we strive to have them competitively compensated and supported.
6. In what areas do you feel PGCPS's benefits programs have been most successful?
Answer: The benefit program provides a competitive plan design that allows PGCPS to remain competitive in the Public Education Sector.



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7. In what areas do you wish to see improvement?
Answer: No specific areas of improvement that prospective vendors need to address at this time. For the purpose of this solicitation, we are interested in evaluating capabilities of vendors to assist with strategic goal setting going forward.
8. What do you see as the greatest challenge(s) to meeting the goals of the benefits/total rewards programs?
Answer: Finances, communications, and engagement.
9. How does PGCPS administer health and welfare benefits today?
Answer: The benefit program is administered by the Benefits Office and in coordination with labor partner expectations. For the most part, plans are self-insured and PGCPS manages an internal insurance fund designed to cover benefit expenses. PGCPS will coordinate with the successful vendor to evaluate and monitor fund sufficiency.
10. Have you surveyed employees to find out what programs they value most? If so, can you share the most recent survey results?
Answer: No employee surveys were conducted.
11. What should a consultant understand about PGCPS before offering recommendations on benefits or total rewards?
Answer: No specific recommendations. For the purpose of this solicitation, we are interested in evaluating capabilities of vendors to assist with strategic goal setting going forward.
12. Does PGCPS currently use a data warehouse tool to integrate medical, pharmacy and other data?
Answer: No.
13. How is healthcare benefit information currently communicated to employees?
Answer: Health benefits are communicated using a variety of media, including our benefit website, newsletters, open enrolment guide (web link and hard copy) as well as communication materials developed in coordination with our vendors.
14. Do you produce (print, mail, etc.) communications in house or outsource to a third party?
Answer: Both in-house and outsource when needed.
15. What level of open enrollment support do you currently have in place? How would you like to expand this support?
Answer: Open enrolment is primarily managed in-house, but certain communication support is provided by our consultants. For the purpose of this solicitation, we are interested in evaluating capabilities of vendors to assist with communications opportunities going forward.
16. Have significant design changes been implemented in the past 2-3 years? If so, what were they?
Answer: No.
17. Please confirm if the following should be included in the requested scope of work? Is the current consultant providing these services? If not, what is PGCPS looking for on these items?
 - a. Defined contribution/Retirement support -- **Answer: Nothing right now. Looking for vendors to demonstrate capabilities in the event we seek support at a later point.**



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- b. Benefits Administration -- **Answer: Nothing right now. Looking for vendors to demonstrate capabilities in the event we seek support at a later point?**
 - c. ACA reporting -- **Answer: Currently conducted in-house. Looking for vendors with knowledge of the process to provide interpretations/assistance when required.**
 - d. Communications support -- **Answer: See Questions and Responses No. 14 and 15.**
18. Do you currently have wellness initiatives and if so, what are they?
Answer: PGCPS has a branded Wellness program titled Wellness360 that provides various offerings (<https://www.pgcps.org/offices/benefits/employee-wellness-program>). In the near future, PGCPS will be incorporating an incentive based rewards program into Wellness360.
19. How long has PGCPS been with the current health and welfare carriers/vendors? How often do you go out to bid on RFPs for your Medical, Pharmacy, Dental, Vision and Life & Disability vendors?
Answer: Most vendor contracts have been in place for five or more years. The Board of Education typically awards vendors three year contracts with the ability for two optional renewals. The planned RFP schedule is listed in the RFP.
20. Are there point solutions in place today that you want replicated with other vendors?
Answer: No
21. What services are you currently receiving from your current Consultant?
Answer: The current consultant is providing all of the services listed in the Scope of Services.
22. Are you asking for any additional services that you are not currently receiving? If so, please indicate which services would be considered new or additional?
Answer: At this time, PGCPS is seeking the services outlined in the Scope of Services. In as much as the benefit arena is always evolving, and as new initiatives surface (for instance via collective bargaining), we expected unanticipated items may arise during the term of the contract.
23. What fee is your current consultant charging through fee or commissions?
Answer: Please note it is PGCPS' policy not to release into the public domain information obtained via a RFP process. However, this information may be made available via a MPIA request. Should you require this information, please submit the MPIA request for consideration to:
- Sally A. Robinson
Associate General Counsel
Office of the General Counsel
Prince George's County Public Schools
14201 School Lane, Room 205
Email: Sally.Robinson@pgcps.org**
24. What are the top 3 pressing concerns your organization is currently facing and would like to solve now?
Answer: No specific "pressing concerns" at this time. For the purpose of this solicitation, we are interested in evaluating capabilities of vendors to assist with strategic goal setting going forward.



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25. Can you please confirm when your current medical and pharmacy contracts end?
Answer: Most contracts have either renewal or extension provisions currently in place. The anticipated future solicitation schedule is included in the RFP.
26. On page 16, under Tab E., Technical Response to RFP Scope of Work, you ask us to address each of the major requirements of part IV (Scope of Work). Can you be more specific about the detail that should be included when addressing each of the requirements? Are there specific items we should be sure to address?
Answer: Offerors shall respond to all elements indicated in the RFP, Part IV Scope of Work as well as the Questionnaire.
27. On page 13, you mention Attachment A, and on page 17, under Volume III: Minority Business Enterprise, you mention Attachment J. We were not able to find Attachment A or J. Can you direct us to where we can obtain all the attachments or appendices described in the RFP?
Answer: Please disregard the request for Attachment A indicated on Page 13 and Appendix J as indicated on page 17 of the RFP. Please see Question and Response No. 28.
28. Can you be more specific about the MBE requirements, including the percentage suggested or required for the selected contractor?
Answer: The MBE goal is 15% participation. The MBE goal can be met by obtaining the services of a certified MBE to provide related services and/or goods for this potential contract. See RFP PUR-007-23, Addendum 1, Section B for additional information.
29. Can a copy of the most recent OPEB valuation report be shared?
Answer: The report is not available for distribution.
30. Please confirm if the scope of services includes services not completed in the past or are new initiatives. If new, please identify those services that will be completed for the first time for PGCPS?
Answer: There are no new initiatives listed in the Scope of Services.
31. Please explain more about the monthly budget reconciliation and confirm that the process for monthly budget reconciliations will be handled by one department?
Answer: Please explain your proposed monthly budget reconciliation process and detail how you will work with PGCPS to ensure a robust, thorough, and meaningful analysis.
32. How is ACA reporting handled currently and envisioned in the future? Specifically, please confirm if PGCPS is requesting that the responding vendor take on preparation, issuance and submission of the Forms 1095 or if that will be retained internally by PGCPS. If conducted internally, please confirm if PGCPS is wanting to include any review of results or submission of results for PGCPS and the scope of services preferred?
Answer: ACA reporting is facilitated in-house by PGCPS with consultation by the Health & Welfare Consultant when required.



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33. In Section 3, Scope of Services, each service is listed, and it is noted that services are not limited to these. In submitting our response, is PGCPS requesting other services listed in the questionnaire to be considered? Or can we focus on this list in our response?
Answer: Appendix H asks for an Umbrella Agreement (capped annual price) for all items listed in the Scope of Services. Services provided outside of those mentioned in the Scope of Services will be billed hourly and not subject to the disclosed capped annual price.
34. In the Pricing section, one requirement is to only offer one Price per service. We are interpreting that to mean in this RFP one fee cap for the set of service requirements and the associated hourly rates of those providing the services defined. Please confirm if our understanding is correct?
Answer: Appendix H requests the billable hourly rates for the Health & Welfare Consulting Team. All provided services will be billed according to the hourly rates indicated in the Offeror's proposal. Appendix H asks for an annual billing cap for all items listed in the Scope of Services for budgeting purposes. Offerors shall only bill for actual services performed on this contract based on the disclosed hourly rates indicated in the Offeror's proposal not to exceed the annual fee cap. Please also see Question and Response No. 33.
35. With respect to the non-exclusive provision of the RFP requirements, is PGCPS envisioning selecting one of the responding vendors for the entire set of services as the preferred outcome? Pricing for the full package will have synergies that result in competitive rates?
Answer: PGCPS anticipates awarding one contract for this solicitation.
36. If possible, please confirm the incumbent partner(s) and fees and any commissions.
Answer: PGCPS is currently riding Benefit Consultant contract entered into by another public entity in the State of Maryland in which Bolton, Inc. was the successful awardee. As stated in the RFP, no commissions are to be included. Please also see Question and Response No. 23.
37. Is PGCPS currently paying commissions on any of the product lines offered whether medical, life insurance or disability? If yes, how does PGCPS prefer that commissions be stated in the RFP when quoting the overall fee cap?
Answer: PGCPS would not pay commissions on any product line. And, commissions from vendors are not permitted under our benefit contracts.
38. The Scope of Services (3.1.18) includes "complete ACA Reporting and Tracking". Please provide additional details around the precise services required.
Answer: ACA Reporting and Tracking is handled in-house. Consultation with the Health & Welfare Consultant is required at times during the process.
39. The Scope of Services includes audits (3.1.13). In order to provide a competitive and appropriate annual fee cap, please provide the specific audits required (medical, PBM, etc and the frequency. Or indicate if a separate per audit fee will be acceptable?
Answer: Self-funded vendors (medical/dental/Rx/vision) will require eligibility and claim auditing every even numbered calendar year of the contract.
40. The Scope of Services includes Dependent Eligibility verification. Please provide details on what services are required. Is this a onetime audit or ongoing service for every new dependent?
Answer: Dependent Eligibility verification is required on a going-forward basis for any newly added dependent to the health plan.



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41. In 1.1.9 OPEB is listed. Is the contractor expected to provide OPEB valuation? If not, what is the expectation? If so, please provide a copy of the most recent valuation?
Answer: The current OPEB valuation work is not being provided by the existing consultant and is not included in Scope of Services. However, we posed the question related to OPEB experience to provide the flexibility of using the successful vendor for that valuation going forward, if desired.
42. The Scope of Services (3.1.13) includes dependent verification services. Please provide specifics regarding the type of services required?
Answer: See Question and Response No. 40.
43. The Scope of Services (3.1.18) includes “complete ACA Reporting and Tracking”. Please provide additional details around the precise services required?
Answer: Please provide details of your ACA Reporting and Tracking capabilities as well for your view on a complete and compliant process.
44. How many 403(b) and 457(b) plans are in the proposed scope of work?
Answer: PGCPS’s defined contribution plans are not included in the Scope of Work. There are questions to be answered in the Technical Questionnaire regarding defined contribution plan exposure and experience.
45. How many current participating investment providers / administration providers?
Answer: There are currently 18 investment providers and one administration provider.
46. Please share the current investment lineup by fund.
Answer: Investment lineup by fund is irrelevant for the purpose of this RFP.
47. We have noticed that Appendix N – MBE 3325 Administration Procedures and Forms is not in the RFP?
Answer: In Section 13.0 of the RFP, PGCPS advised Administrative Procedures and forms are available for download. See Question and Response No. 28.
48. Who is the current vendor?
Answer: See Question and Response No. 36.
49. How long has the incumbent vendor been providing services?
Answer: Approximately four (4) years.
50. What is the reason for the issuance of this RFP, in lieu of providing a contract extension to continue using the incumbent consulting firm?
Answer: See Question and Response No. 1.
51. Is PGCPS interested in any improvements or additional services? If yes, please identify.
Answer: For the purpose of this solicitation, we are interested in evaluating capabilities of vendors to assist with the items outlined in the Scope of Services.
52. Will the incumbent vendor be eligible to bid for this RFP?
Answer: The solicitation is open to all qualified consultants capable of providing services in accordance with the terms and conditions of the RFP.



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53. In order to assist us in gaining a clear understanding of the scope of work, can you please provide the amount of total level of effort (hours of work) and fees paid to the current consultant in 2020, 2021 and 2022?

Answer: A response for the requested information cannot be provided in time for release of this addendum. Offerors are asked to provide their best pricing and approach to addressing the items outlined in the scope of work.

Please note it is PGCPS' policy not to release into the public domain information obtained via a RFP process. However, this information may be made available via a MPIA request. Should you require this information, please submit the MPIA request for consideration to:

**Sally A. Robinson
Associate General Counsel
Office of the General Counsel
Prince George's County Public Schools
14201 School Lane, Room 205
Email: Sally.Robinson@pgcps.org**

54. In particular, if available, please provide the separate fees/hours of work for different services included in the current vendor's contract (for example, Health and Welfare core services, Plan Rate Review, etc.)

Answer: See Question and Response No. 53.

55. Please identify/describe any special projects that may have been authorized during the current contract, including number of hours and corresponding fees.

Answer: See Question and Response No. 53.

56. Was the scope of services required in prior years similar to that required in the current RFP? If it has changed, please identify any changes.

Answer: The current consultant is providing all of the services listed in the Scope of Services. Offerors are asked to provide their best pricing and approach to the items outlined in the scope of work for this solicitation.

57. How many in person meetings are required for the chosen consultant to attend? Please provide us details on when and where these meetings will take place.

Answer: For the purposes of this solicitation vendors can assume no more than four (4) in person meetings. The actual number of meetings may vary depending on how any given project unfolds.

58. How many hard copies of reports are expected for delivery?

Answer: For the purposes of this solicitation, vendors can assume two (2) hard copies of any reports.

59. Does PGCPS currently utilize a benefits administration system?

a. If yes, please provide name. **Answer: Benefits are administered internally using Oracle Advanced Benefits.**

b. Has PGCPS evaluated benefit administration systems in recent years? If yes, what companies by name were considered? **Answer: PGCPS Benefit Staff has reviewed the capabilities of several**



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benefit administration platforms over the years. There is currently no funding, no plan, and/or commitment to implement a platform.

- c. What is the expected timeline of implementation of a benefits administration system? **Answer: There is currently no funding nor plan and/or commitment to implement a benefits administration system.**
60. What is the contract start date?
Answer: See RFP PUR-007-23, Item No. 8.0 which indicates the effective date of the contract will be April/May 2023.
61. Who is the current LTD carrier? What is their contract term?
Answer: Metropolitan Life Insurance Company. Please see the future solicitation schedule (page 19).
62. Please describe any on-going wellness programs and current wellness vendors that are currently utilized. Is the program meeting your organization needs?
Answer: Burnalong, WellSet, Inova EAP are current external vendors being utilized in PGCPS's Wellness360 program.
63. Who is the current Section 125 provider? What is the Section 125 Plan year? What are the Section 125 open enrollment dates?
Answer: The current Flexible Spending Plan administrator is HealthEquity/WageWorks. Open enrollment is in the October timeframe for the plan year beginning January 1.
64. We noted on page 54 of RFP, question number 39, it requests experience with 403b/457 plan consulting.
- a. Has 403b/457 consulting services been provided under current contract term by incumbent consultant or other party? If yes, please provide name of company, description of services and the date(s) services were provided? **Answer: Services are not provided under the current contract. We are seeking to understand vendor capabilities should we need support in this area.**
- b. Do you anticipate similar 403b/457 services to be performed by newly contracted consultant?
Answer: See Question and Response No. 64a.
- c. We noted PGCPS employees have access to a high number of 403b/457 investment providers. When was the last consultant investment and recordkeeper fee benchmarking conducted to help control costs incurred by employees? **Answer: This is not relevant, nor requested in the Scope of Services. We are seeking to understand vendor capabilities in defined contribution plans.**
- d. Department of Labor identifies plan sponsor fiduciary best practice to conduct fee benchmarking and/or RFP every 3-5 years. Do you anticipate this task could be a potential additional service under this new consultant contract term? **Answer: Possibly, but no decision has been made at this time.**
65. What is the total dollar amount of fees paid to the current or previous consultant that conducted 403b/457 plan for the last two (2) years? Was it a fixed fee, hourly rate?
Answer: PGCPS's current Health & Welfare Consultant has not been engaged in defined contribution plan services, nor is this mentioned in the current Scope of Work.
66. Does the list of active 403b/457 providers available to PGCPS employees outlined in the following link accurate? (<https://www.omni403b.com/plandetail/1275?sel=True>) Please confirm.
Answer: Yes



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67. When do the current recordkeeper contracts expire?
Answer: If you are referring to 403b/457 recordkeeper, the contract expires December 31, 2024.
68. When was the last 403b/457 Recordkeeper RFP completed?
Answer: The last 403(b)/457 Recordkeeper contract was awarded January 1, 2019.
69. In what year is the next Recordkeeper RFP anticipated?
Answer: Timing for a future Recordkeeping RFP has not been identified.
70. What are PGCPS's expectations for the consultant regarding the recordkeeper search process? Will it include drafting, and evaluating the recordkeeping RFP responses?
Answer: No recordkeeping search is scheduled at this time. For the purposes of this RFP, PGCPS is seeking to understand vendor capabilities in the event we need support in this area.
71. Can you please identify amount of plan assets in risk-based/managed account portfolios?
Answer: No.
72. Does PGCPS have a 403b/457 plan investment policy statement? If yes, can you please provide a copy? When was IPS last updated?
Answer: A plan investment policy statement is not available for distribution. We are interested in understanding vendor capabilities regarding defined contribution plans.
73. Can you please provide us with the ticker symbols and the current market value of each 403b/457 fund option in the plan segregated by recordkeeper? If ticker symbols are not available, can you please provide us the name of the fund, asset class, investment objective, and expense ratio of each fund?
Answer: Not relevant to this solicitation. PGCPS is requesting information regarding your experience in this area.
74. What is the expected annual cash flow of contributions in each of the 403b/457 providers?
Answer: See Question and Response No. 73.
75. Can you please provide a copy of the most recent full valuation and roll forward OPEB valuation reports?
Answer: This information is not available for distribution.
76. Can you please disclose the names and title of the proposal evaluation committee?
Answer: PGCPS does not disclose the names of the evaluation committee members. However, committee members will be PGCPS employees and will conduct all scoring. Girling Benefit Consulting has been engaged to provide technical assistance to review pricing and serve as a subject matter expert (SME). Girling Benefit Consulting will not participate as a scoring member of the evaluation committee. No other consultants have been engaged to assist or participate in this solicitation process.
77. Is there any MBE company(s) or other sub-contractors participating in the current contract? If yes, please provide the name, brief description of services, and percentage and dollar amount of their annual fees?
Answer: There are no MBE subcontractors on the current contract.



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78. To help facilitate meaningful professional service MBE contract participation, could you please release a list of pre-proposal call attendees from the January 20th preproposal meeting, along with their contact information?

Answer: Yes, please see attached.

79. We noted from (<https://www.pgcps.org/offices/benefits/dependent-verification>) that Bolton is conducting dependent eligibility verification service.

- a. Can you please describe the process and frequency this is performed? **Answer: Every newly added dependent to health coverage is verified as an eligible dependent.**
- b. Is this service meeting PGCPS's expectations of providing acceptable results? **Answer: Yes.**
- c. What is the fee Bolton is charging for this service? **Answer: See Question and Response No. 23.**
- d. Is this an acceptable service we could outsource to a sub-contractor and/or transition this function to a benefit administration technology as outlined in RFP page 55, question 53? **Answer: Please provide your suggested approach for dependent eligibility verification services. Please also see Question and Response No. 59b.**

80. The RFP states the addendum was to be posted on February 1, 2023. Today is February 6th. Is the BOE planning to extend the deadline? We are in need of the 3325 forms to send to our minority businesses, while providing them time to respond. In addition, the answers from the addendum will help better frame our responses.

Answer: As referenced in the RFP PUR-007-23, Administrative Procedures and Forms were available for download from the PGCPS website. Please see RFP PUR-007-23, Addendum 1, Section B for the link.

END OF ADDENDUM NO. 1