



September 13, 2021

TO WHOM IT MAY CONCERN:

Subject: Request for Proposal No. 21-00176-ADIM – Medical and Welfare Benefits Broker – 5 yr. term

Southeastern Pennsylvania Transportation Authority (SEPTA) is soliciting proposals from qualified brokers for **Medical and Welfare Benefits Broker – 5 yr. term**. The qualified proposers shall be able to procure medical stop loss insurance, voluntary benefits, serve as the “Broker of Record” for medical, prescription, dental and vision benefits coverages, as well as provide all services and all consulting requirements in Scope of Services.

Prospective Proposers can view or download The Request for Proposal Documents from SEPTA’s website www.septa.org. Follow this path: Business/Procurement/Bid& RFP Opportunities/Over \$100,000 Non-EPS Bid/RFP Opportunities. The RFP documents include Proposers Instructions, Agreement, Scope of Services, and any associated attachments. **CAUTION:** Subsequent correspondence and follow-up documentation concerning this Request for Proposal No. **21-00176-ADIM** will only be sent to consultants who have submitted written requests (via email) for the proposal documents. It is the consultant’s responsibility to assure that it has all the necessary correspondence and documents from SEPTA to properly prepare its proposal.

Each proposal shall be submitted in two (2) separate parts, enclosed in two (2) separate packages, and identified as Technical Proposal and Cost Proposal. Cost proposals will not be opened until the technical evaluation is completed.

A Pre-Proposal Meeting will be held on Wednesday, September 22, at 11:30 AM. A representative of your company is encouraged to join to discuss the proposed work with representatives of SEPTA, but attendance is not mandatory. To call into the TEAMS meeting, please dial +1 312-593-1554 and enter conference ID: 761 370 365#. This will be for audio only. Please email me if you would like me to forward the link for this meeting.

To help with our COVID-19 safety protocol, guests will not be permitted to access the floors of 1234 Market Street. If you would like to join the Pre-Proposal Meeting, please reach out to Diane McCarthy, Contract Administrator, at dmccarthy@septa.org to request the TEAMS meeting link.

All questions pertaining to this request for proposal must be submitted in writing to SEPTA, 1234 Market Street, 11th Floor, Philadelphia, Pennsylvania 19107, Attn: Diane McCarthy, Procurement, Supply Chain & DBE Division via email: dmccarthy@septa.org. **All questions must be received no later than the close-of-business (4:30 P.M.) on Thursday, September 30, 2021.** The answers to all questions submitted will be issued as an addendum to the project.

Three (3) copies and one (1) original of the Technical Proposal and three (3) copies and one (1) original of the Cost Proposal are to be submitted to SEPTA, by the close of business (4:30 P.M.) on Tuesday, October 19, 2021.

Please direct all correspondence to:

Diane McCarthy
Sr. Contract Administrator
Procurement, Supply Chain & DBE Division
1234 Market Street, 11th Floor
Philadelphia, Pennsylvania 19107

Subject to SEPTA's right to reject any and all proposals and/or to negotiate separately with any firm in any manner deemed appropriate to serve its best interests, if any award is made as a result of these proposals, it will be made on the basis of the proposal which best satisfies the intent of the RFP and other factors considered in the best interests of SEPTA.

SEPTA, in accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 253, 42 U.S.C. 2000d to 2000d-4, and Title 49, Code of Federal Regulations, Department of Transportation, SubTitle A, Office of the Secretary, Department of Transportation, in Federally Assisted Programs of the Department of Transportation issued pursuant to such Act, hereby notifies all proposers that it will affirmatively, insure that in regard to any contract entered into pursuant to this advertisement, disadvantaged business enterprises will be afforded full opportunity to submit proposals in response to this invitation, and will not be discriminated against on the grounds of race, sex, color, or national origin in consideration for an award.

Consultant will be required to comply with all applicable Equal Employment Opportunity laws and regulations.

All proposers will be required to certify compliance with Executive Order 12549 (ineligible contractors).

Oral, telegraphic, or telephonic proposals or modifications will not be considered.

Sincerely,

Diane McCarthy

Diane McCarthy
Contract Administrator
Procurement, Supply Chain & DBE Division