TRIDENT TECHNICAL COLLEGE

Request for Proposal
Amendment #: 1

Solicitation Number	080417-946-41405-08/31/17
Date Printed	09/26/17
Date Issued	09/26/17
Procurement Officer	Robert E Tyner, C.P.M.
Phone	(843) 574- 6279
E-mail Address	Robert.tyner@tridenttech.edu

DESCRIPTION: Provide 403b Plan Administrative Services for TTC 2017

The Term "Offer" Means Your "Bid" or "Proposal".

SUBMIT OFFER BY (Opening Date/Time): **10/12/17 @ 2:00 PM EDT** See "Deadline For Submission Of Offer" provision

QUESTIONS MUST BE RECEIVED BY: **Deadline Has Passed.** See "Questions From Offerors" provision

NUMBER OF COPIES TO BE SUBMITTED: **1**

Offers must be submitted in a sealed package. Solicitation Number & Opening Date must appear on package exterior.

SUBMIT YOUR OFFER TO EITHER OF THE FOLLOWING ADDRESSES:

MAILING ADDRESS:
Trident Technical College
Procurement Office
PO Box 118067
Charleston, SC 29423
Fax: 843 574-6395

PHYSICAL ADDRESS
Trident Technical College
Procurement Office
Building 940, Suite G, Room 110
2050 Mabeline Rd. N. Chas SC 29406
See "Submitting Your Offer" provision

ALL MAIL IS PICKED UP FROM THE US POSTAL SERVICE ONCE DAILY AT AROUND 8:00 A.M. (EXCLUDING WEEKENDS AND HOLIDAYS).

CONFERENCE TYPE: **N/A** DATE & TIME:	LOCATION: **N/A**

AWARD & AMENDMENTS	This solicitation, and any amendments will be posted at the following web address: http://www.tridenttech.edu/about/departments/proc/ttc_solic.htm.

You must submit a signed copy of this form with Your Offer. By submitting a bid or proposal, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of thirty (30) calendar days after the Opening Date.

NAME OF OFFEROR (Full legal name of business submitting the offer)		OFFEROR'S TYPE OF ENTITY: (Check one) ☐ Sole Proprietorship ☐ Partnership ☐ Corporation (tax-exempt) ☐ Corporate entity (not tax-exempt) ☐ Government entity (federal, state, or local) ☐ Other (See "Signing Your Offer" provision.)
AUTHORIZED SIGNATURE (Person signing must be authorized to submit binding offer to enter contract on behalf of Offeror named above.)		
TITLE (Business title of person signing above)		
PRINTED NAME (Printed name of person signing above)	DATE SIGNED	

Instructions regarding Offeror's name: Any award issued will be issued to, and the contract will be formed with, the entity identified as the offeror above. An offer may be submitted by only one legal entity. The entity named as the offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, *i.e.*, a separate corporation, partnership, sole proprietorship, etc.

STATE OF INCORPORATION (If Offeror is a corporation, identify the state of Incorporation.)	
TAXPAYER IDENTIFICATION NO. (See "Taxpayer Identification Number" provision)	

COVER PAGE MMO (JAN. 2006)

PAGE TWO

(Return Page Two with Your Offer)

HOME OFFICE ADDRESS (Address for offeror's home office / principal place of business)	NOTICE ADDRESS (Address to which all procurement and contract related notices should be sent.) (See "Notice" clause) Address Area Code – Number – Extension Facsimile E-mail Address
PAYMENT ADDRESS (Address to which payments will be sent.) (See "Payment" clause) ___Payment Address same as Notice Address **(check only one)** ___ Payment Address same as Home Office Address	ORDER ADDRESS (Address to which purchase orders will be sent) (See "Purchase Orders and "Contract Documents" clauses) ____Order Address same as Home Office Address ____Order Address same as Notice Address **(check only one)**

ACKNOWLEDGMENT OF AMENDMENTS

Offerors acknowledges receipt of amendments by indicating amendment number and its date of issue. (See "Amendments to Solicitation" Provision)

Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date

DISCOUNT FOR PROMPT PAYMENT (See "Discount for Prompt Payment" clause)	10 Calendar Days (%)	20 Calendar Days (%)	30 Calendar Days (%)	_____Calendar Days (%)

End of PAGE TWO

Bidders shall acknowledge receipt of this Amendment prior to date and time specified in the solicitation , or as amended, by one of the following methods: (1) by signing and returning the Amendment, (2) by letter, or (3) by submitting a bid that indicates in some way that the bidder received the amendment. Failure of your acknowledgement to be received at the issuing office prior to date and time specified may result in rejection of your offer. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided such telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified. **The college will not accept faxed amendments.**

THE SOLICITATION IS AMENDED AS PROVIDED HEREIN. INFORMATION OR CHANGES RESULTING FROM QUESTIONS WILL BE SHOWN IN A QUESTION-AND-ANSWER FORMAT. ALL QUESTIONS RECEIVED HAVE BEEN REPRINTED BELOW. THE “STATE’S RESPONSE” SHOULD BE READ WITHOUT REFERENCE TO THE QUESTIONS. THE QUESTIONS ARE INCLUDED SOLELY TO PROVIDE A CROSS-REFERENCE TO THE POTENTIAL OFFEROR THAT SUBMITTED THE QUESTION. QUESTIONS DO NOT FORM A PART OF THE CONTRACT; THE “STATE’S RESPONSE” DOES. ANY RESTATEMENT OF PART OR ALL OF AN EXISTING PROVISION OF THE SOLICITATION IN AN ANSWER DOES NOT MODIFY THE ORIGINAL PROVISION EXCEPT AS FOLLOWS: UNDERLINED TEXT IS ADDED TO THE ORIGINAL PROVISON. STRICKEN TEXT IS DELETED.

Solicitation #: 080417-946-41405-08/31/17

Title: Provide 403b Plan Administrative Services for TTC 2017

Is hereby amended as follows:

Revisions Unrelated to Questions:

State’s Response: The solicitation is modified as follows:

~~SUBMIT OFFER BY (Opening Date/Time): **10/02/17 @ 2:00 PM EST**~~

SUBMIT OFFER BY (Opening Date/Time): **10/12/17 @ 2:00 PM EST**

~~QUESTIONS MUST BE RECEIVED BY: **09/25/17 @ 3:00 PM EDT**~~

QUESTIONS MUST BE RECEIVED BY: **DEADLINE HAS PASSED.**

Questions:

Question 1: Does TTC currently have a plan administrator for the 403b plan, or is it self-administered?

State’s response: No change. TTC currently has a plan administrator for the 403b plans – TSA Consulting Group.

Question 2: What is the reason for your search?

State’s response: No change. The current contract is expiring.

Question 3: What is the number of plans involved in the RFP?

State's response: No change. See section III, Scope of Work / Specifications, page 13;

Current plan providers are Aspire, Lincoln Financial, TIAA, MET-LIFE, and VALIC.

Question 4: Are the current providers – MetLife, VALIC, Lincoln Financial, and Aspire Financial invited to re-bid?

State's response: No change. There is no anticipated change in the current providers, Aspire, Lincoln Financial, TIAA, MET-LIFE, and VALIC.

Question 5: What are the total sizes of the plan(s)?

State's response: No change. See question 3 above.

Question 6: It also looks like TSA Consulting is provider for a 403(b) plan for the college but it is not mentioned anywhere in the RFP? TSA is a provider for a separate 403(b) plan?

State's response: No change. See question 1 above. No, TSA is not providing any financial products.

Question 7: In Section IV. You request the carrier's A.M. Best rating. This rating is given to Insurance companies that provide the 403(b) products but not to an independent Third Party Administrator (TPA). A TPA will oversee the administration not sell the product. Is it the intent of the college to have a TPA that also markets one of the investment products to the employees? That is not the college's current arrangement, but we need to know if there has been a change in the college's intent.

State Response: See section VII-B, Terms and Conditions – Special, Contractor's Liability Insurance - General, page 25, Additional Insurance Requirements, page 26, and Contractor's Liability Insurance – Information Security and Privacy, page 26; These clauses reference the insurance coverage the contractor is required to carry during the term of the contract. No. The College will not allow the 403b Plan Administration Services contractor to market or sell its financial products at TTC.

Question 8: In Section IV, you ask for a list of governmental agencies of similar size. Can you clarify if you have a certain number required? We currently have 787 agencies that we provide similar services to that fall in the college's size. Do you want a list of all of them or can you let us know an appropriate number?

State Response: The solicitation is modified as follows:

1. ~~A list of government agencies and/or educational institutions of similar size and complexity for whom you are providing 403b administrative services.~~ Include full contact information to include: name of agency or institution, contact person's name, telephone number, and e-mail address.

1. A list of, at a minimum, (10) government agencies and/or educational institutions of similar size and complexity for whom you are providing 403b administrative services. Include full contact information to include: name of agency or institution, contact person's name, telephone number, and e-mail address.

Question 9: In Section IV, #2 under please submit, you ask for license to conduct financial services. Again this is typically a state issued license to sell or represent financial products. Can you please clarify which type of state offered license from the State of South Carolina you may be referring too? Our initial corporate annual report was submitted as part of the SC Registration 6/28/11. Each year thereafter, the corporation annual report is a part of the corporation income tax return and paid along with the corporate income tax. Is this registration sufficient for the required license?

State Response: No change. The initial corporate annual report submitted as part of the SC Registration and on-going annual reports and income tax returns and corporate income taxes paid is sufficient to meet the requirements of Section IV, item 2.