

	District Five of Lexington and Richland Counties Request For Proposals Amendment One	Solicitation #	2026-049
		Date Amendment Issued	July 2, 2026
		Procurement Official	Chris Winslow
		Phone	(803) 476-8140
		E-Mail Address	D5bids@lexrich5.org

DESCRIPTION	Benefits Enrollment Services
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The Term "Offer" Means Your "Bid" or "Proposal"

SUBMIT OFFER BY	July 7, 2026 @ 11:00 am July 9, 2026 @ 11:00am
QUESTIONS MUST BE RECEIVED BY	June 25, 2026 @ 12:00 pm Electronically to D5bids@lexrich5.org TIME HAS PASSED
NUMBER OF COPIES TO BE SUBMITTED	One (1)

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

SUBMIT YOUR SEALED OFFER TO:

**District Five of Lexington and Richland
Counties
Purchasing Office
1020 Dutch Fork Road
Irmo, SC 29063**

CONFERENCE TYPE: N/A DATE & TIME: As appropriate, see "Conferences - Pre-Bid/Proposal" & "Site Visit" provisions	LOCATION: N/A
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AWARD & AMENDMENTS	The award, this solicitation, and any amendments will be posted at the following web address: https://www.lexrich5.org/departments/office-of-finance/procurement/solicitations-and-awards
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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 sixty (60) 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 a binding offer to enter into a 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. 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>i.e.</i> , a separate corporation, partnership, sole proprietorship, etc.		
STATE OF INCORPORATION (If Offeror is a corporation, identify the state of Incorporation.)	TAXPAYER IDENTIFICATION NO.	

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Amendment One

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(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)						
	Area Code - Number - Extension Facsimile						
	E-Mail Address						
PAYMENT ADDRESS (Address to which payments will be sent.) (See "Payment" clause)	ORDER ADDRESS (Address to which purchase orders will be sent) (See "Purchase Orders" and "Contract Documents" clauses)						
	Order E-Mail Address:						
☐ Payment Address same as Home Office Address ☐ Payment Address same as Notice Address (check only one)	☐ Order Address same as Home Office Address ☐ Order Address same as Notice Address (check only one)						
ACKNOWLEDGMENT OF AMENDMENTS: Offerors acknowledge 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 (%)			
PREFERENCES - A NOTICE TO VENDORS (SEP. 2009): On June 16, 2009, the South Carolina General Assembly rewrote the law governing preferences available to in-state vendors, vendors using in-state subcontractors, and vendors selling in-state or US end products. This law appears in Section 11-35-1524 of the South Carolina Code of Laws. A summary of the new preferences is available at www.procurement.sc.gov/preferences . ALL THE PREFERENCES MUST BE CLAIMED AND ARE APPLIED BY LINE ITEM, REGARDLESS OF WHETHER AWARD IS MADE BY ITEM OR LOT. VENDORS ARE CAUTIONED TO CAREFULLY REVIEW THE STATUTE BEFORE CLAIMING ANY PREFERENCES. THE REQUIREMENTS TO QUALIFY HAVE CHANGED. IF YOU REQUEST A PREFERENCE, YOU ARE CERTIFYING THAT YOUR OFFER QUALIFIES FOR THE PREFERENCE YOU'VE CLAIMED. IMPROPERLY REQUESTING A PREFERENCE CAN HAVE SERIOUS CONSEQUENCES. [11-35-1524(E)(4) & (6)]							
PREFERENCES - ADDRESS AND PHONE OF IN-STATE OFFICE: Please provide the address and phone number for your in-state office in the space provided below. An in-state office is necessary to claim either the Resident Vendor Preference (11-35-1524(C)(1)(i)&(ii)) or the Resident Contractor Preference (11-35-1524(C)(1)(iii)). Accordingly, you must provide this information to qualify for the preference. An in-state office is not required, but can be beneficial, if you are claiming the Resident Subcontractor Preference (11-35-1524(D)).							
☐ In-State Office Address same as Home Office Address ☐ In-State Office Address same as Notice Address (check only one)							

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AMENDMENT ONE
Benefits Enrollment Services
SOLICITATION # 2026-049

The Solicitation may be amended at any time prior to opening. Submitters shall acknowledge receipt of any amendment to this solicitation (1) by signing and returning the amendment, (2) by identifying the amendment number and date in the space provided for this purpose on Page Two, (3) by letter, or (4) by submitting a bid that indicates in some way that the bidder received the amendment. (c) If this solicitation is amended, then all terms and conditions which are not modified remain unchanged.

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 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 "DISTRICT'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 PROVISION. ~~STRICKEN TEXT IS DELETED.~~

CLARIFICATIONS/ RESPONSES TO BIDDER QUESTIONS:

SUBMIT OFFER BY: ~~July 7, 2026 @ 11:00 am~~ **July 9, 2026 @ 11:00am**

Question: Please identify the District's current Benefits Enrollment Services provider and the length of the current engagement.

District Response: The contractor providing Benefits Enrollment Services for the last 5 years has been Ward Services.

Question: Are you able to provide current employee participation counts, by carrier and product line, for each District-approved voluntary benefit currently offered?

District Response: The participation counts by carrier and product line for voluntary benefits currently offered are as follows:

Allstate Cancer 599
Trustmark Accident 389
Trustmark Cancer/Critical Illness 192
Trustmark STD 895
Trustmark UL/LTC 761

Question: Please identify the current enrollment technology platform utilized by the District. If the District intends for the successful offeror to maintain the existing platform, please identify the platform and describe any expectations regarding transition or continued use.

District Response: The technology platform utilized by the District is, and will continue to be, PEBA.

Question: Please describe the current staffing model supporting Benefits Enrollment Services, including the number of enrollment counselors, service representatives, and other personnel assigned to support the District during annual enrollment and throughout the year.

District Response: The District does not maintain information regarding the current contractor's staffing model or the number of personnel assigned. The current contractor provides staffing to support annual Open Enrollment and new hire enrollment throughout the year.

Question: Does the District currently utilize a dedicated on-site Benefits Service Representative or similar full-time resource to support employee benefits administration, enrollment activities, and employee benefit education throughout the year?

District Response: No. The District does not currently have a dedicated on-site Benefits Service Representative or similar full-time resource to support employee benefits administration, enrollment activities, and employee benefit education.

Question: If a new contractor is selected, please describe the District's expectations regarding the transition of Agent of Record responsibilities for District-approved voluntary benefit products.

District Response: If a new contractor is selected, the successful offeror will be expected to ensure a seamless transition of services with minimal disruption to the District. As part of its proposal, the Offeror should describe its proposed implementation and transition approach, including any activities related to the transition of Agent of Record responsibilities, if applicable.