

XI.F

Scope:

2014-2015 Flex Spending Account Services
Request for Proposal (RFP)

Receipt of Proposals:

Monday, November 3, 2014

Proposals Requested From:

Benefit Mall
Benefit Resource, Inc.
Brown & Brown of New York, Inc.
d.b.a. Fitzharris Company
J.J. Stanis & Co.
Newman Company

Total Number of Proposals Received:

2

Proposals Received From:

Benefit Resource, Inc.
Brown & Brown of New York, Inc.
d.b.a. Fitzharris Company

Tabulations of Proposals Received:

See Attached

Bid Awarded To:

Benefit Resource, Inc.
245 Kenneth Drive
Rochester NY 14623

Background:

Proposals were received by Dr. Spiro C. Colaitis, Assistant Superintendent for District Operations, Purchasing Official, Christopher Caputo, Business Administrator, and Donna Fecht, Administrative Assistant on Monday, November 3, 2014.

Recommendation:

After analyzing all proposals, it is recommended that the district award the contract to Benefit Resource, Inc.

FLEX SPENDING ACCOUNTING

Monday, November 3, 2014

Beniversal by Benefit Resource, Inc.

<u>Installation:</u> <ul style="list-style-type: none"> • Program design • Plan documentation (also available in Spanish) • Initial enrollment session • Initial enrollment materials • 	\$500.00 waived
<u>Ongoing Support</u> Account Administration <ul style="list-style-type: none"> • Beniversal Card • Qualified expense claim processing • Online participant account statements • Employer benefit accounting reports • Web support at www.BenefitResource.com • 	\$3.95 per participation/month or (\$100.00 monthly minimum)
Beniversal new card issue	\$2.50 per cardholder (one time) Waived for initial enrollment
Direct deposit reimbursement	No charge
Compliance Administration <ul style="list-style-type: none"> • Plan document amendments • Non-discrimination testing • 	\$295.00 per year
Beniversal Cardholder Fees <ul style="list-style-type: none"> • Lost/Stolen replacement card • Expedited card processing • 	\$ 5.00 per card \$30.00 per card
<u>Optional Support</u> Customization of plan documentation	\$250.00/hour

Brown & Brown of New York, Inc.
d.b.a. Fitzharris & Company

Date: November 3, 2014	Administration Fee (Per member per Month) (Guaranteed for 24 months)
January 1, 2015 to December 31, 2016	\$3.50
Set-up Fee	\$0.00
Debit Card Fee	\$0.00 for the first card per family. Any additional or lost cards have a fee of \$1.00.
Run-Out Processing (Flat Fee)	\$500.00
Banking Fees:	There are no additional fees for banking services. They are included within the monthly administrative fee.
Claims Forms:	No Fee