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Documentary No. 101583



# GREATER ORLANDO AVIATION AUTHORITY

## PROFESSIONAL SERVICES

### 23-115-RFP BENEFITS CONSULTANT SERVICES

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**Firm:** **Alliant Insurance Services, Inc.**  
Alliant Orlando  
Alliant Insurance Services, Inc.  
271 N. Pennsylvania A e. Suite 5  
Winter Park, FL 32789

Charles Cook, EVP, Producer

**Dept.:** **Human Resources**

**SPA:** **Janice K. Hughes, CPPB**

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## **Professional Services Agreement**

**THIS AGREEMENT**, made and entered into as of the 17th day of February, 2023, by and between the **GREATER ORLANDO AVIATION AUTHORITY**, a public and governmental body existing under and by virtue of the laws of the State of Florida (the "Aviation Authority"), with a business address at Orlando International Airport, One Jeff Fuqua Boulevard, Orlando, Florida 32827-4399, and **ALLIANT INSURANCE SERVICES, INC.**, (the "Consultant"), with a business address at 271 N. Pennsylvania Ave. Suite 5, Winter Park, Florida 32789, (Aviation Authority and the Consultant sometimes collectively referred to herein as the "Parties").

### **WITNESSETH:**

**WHEREAS**, the Aviation Authority desires to employ the services of a Consultant to provide professional and related services required in connection Benefit Consulting Services at the Orlando International Airport and Orlando Executive Airport;

**WHEREAS**, the Consultant is qualified, willing and able to perform the professional services required on the terms and conditions hereinafter set forth; and

**NOW, THEREFORE**, in consideration of the premises and the mutual covenants herein contained, the parties hereto do hereby agree as follows:

#### **1. Services to be Provided by the Consultant.**

- 1.1 **Scope of Services.** The Consultant hereby agrees to perform for Aviation Authority services and work product set forth on the Scope of Services attached hereto as **Exhibit "A"** and incorporated herein by reference (the "Services"). The Services may be modified or increased from time to time by written amendment to this Agreement signed by both Parties; provided, however, the Aviation Authority shall have the right, by written notice to the Consultant, to unilaterally reduce the Services to be rendered hereunder.
- 1.2 **Personnel.** The Consultant agrees to retain the necessary qualified personnel acceptable to Aviation Authority to perform all Services for Aviation Authority pursuant to this Agreement. The Consultant further agrees to promptly remove any personnel from performing Services as Aviation Authority shall request in writing (which request may be made by Aviation Authority with or without cause), and to promptly replace such personnel with other of the Consultant's personnel of comparable experience reasonably acceptable to the Aviation Authority. The Consultant agrees to include a similar provision in its agreements with any and all SubConsultants. Any changes of personnel assigned during the term of this Agreement must be approved by the Aviation Authority, and if not acceptable to the Aviation Authority, the Aviation Authority reserves the right to terminate the agreement.
- 1.3 **SubConsultants.** The Consultant shall perform all of its obligations and functions under this Agreement by means of its own employees or by a duly qualified SubConsultant approved in writing by the Aviation Authority in advance ("SubConsultant"); provided, however, no SubConsultant shall

perform any of the Consultant obligations under this Agreement unless the Aviation Authority approves the SubConsultant in advance in writing. In the event any SubConsultant is employed, the Consultant shall continuously monitor the SubConsultants performance and shall remain fully responsible to ensure that the SubConsultants perform Services as required in accordance with this Agreement. The Aviation Authority shall have no obligation to pay for any unsatisfactory performance of SubConsultants nor to reimburse the Consultant for Services rendered by SubConsultants in connection with the Consultant's performance of Services unless Aviation Authority has given prior written approval of the compensation to be paid SubConsultants by the Consultant. The Aviation Authority may require that invoices for all work (including invoices submitted to the Consultant for work performed by SubConsultants) shall be submitted to the Aviation Authority by the Consultant and the Aviation Authority shall pay all compensation to the Consultant, or Aviation Authority shall have the right, but not the obligation, to pay a specific amount directly to any SubConsultant. The Consultant agrees to pay such SubConsultants for their Services within fifteen (15) days after the Consultant's receipt of payments from the Aviation Authority for accepted work performed by SubConsultants. It shall be the sole responsibility of the Consultant to deal with SubConsultants with respect to the collecting and submission of invoices and the payment of compensation. Payment of compensation by the Aviation Authority to the Consultant for work performed by SubConsultants shall relieve the Aviation Authority of all future liability to the SubConsultant and shall thereafter precludes the SubConsultant from bringing any claim against the Aviation Authority. The Consultant agrees to include insurance and indemnity requirements set forth herein in agreements with any SubConsultants for performance of Services.

- 1.4 **Consultant's Reasonable Efforts and Standards of Performance.** The Consultant agrees to use its reasonable efforts to perform and/or to cause SubConsultants to perform all Services in such sequence, and in accordance with such reasonable time requirements and reasonable written instructions, as may be requested or provided by Aviation Authority, and the Consultant agrees to perform and/or cause SubConsultants to perform all Services in accordance with applicable professional standards, and in accordance with the conditions contained in this Agreement.
- 1.5 **Consultant's Liability.** The Consultant shall be and remain liable in accordance with applicable law for all damages to Aviation Authority caused by the improper acts or omissions of the Consultant or by any SubConsultants in performing any Services to the extent determined by a court of competent jurisdiction, not subject to further appeal. All provisions of this Agreement specifying the Consultant's obligation and duties in performing Services shall apply equally to SubConsultants performing Services.
- 1.6 **Consultant's Obligation to Correct Errors or Omissions.** The Consultant agrees to be responsible for the quality, technical adequacy and accuracy, of all Services furnished by the Consultant or any SubConsultants, in accordance with its specific obligations hereunder. The Consultant shall, without additional cost or expense to the Aviation Authority, correct or revise any errors,

omissions, or other deficiencies in the Services performed by the Consultant, resulting from improper acts or omissions of the Consultant or SubConsultants to the extent determined by a court of competent jurisdiction, not subject to further appeal.

- 1.7 **Consultant's Compliance with Laws and Regulation.** The Consultant and its employees shall promptly observe and comply with then applicable provisions of all Federal, State and local laws, rules and regulations which govern or apply to the Services rendered by the Consultant hereunder, or to the wages paid by the Consultant to its employees. The Consultant shall require all of its Sub-Consultants to comply with the provisions of this paragraph.
- 1.8 **Consultant Is Not Aviation Authority's Agent.** The Consultant is, and at all times shall be deemed to be, an independent Consultant and shall be wholly responsible for the manner in which it performs the services required of the Consultant by the terms of this Agreement. The Consultant shall be liable for any of its acts, and the acts of its Sub-Consultants, and their respective agents or employees, and nothing contained herein shall be construed as creating the relationship of employer and employee, nor principal and agent, between the Aviation Authority and the Consultant or any Sub-Consultant. Neither the Consultant nor any SubConsultant is authorized to neither act as Aviation Authority's agent hereunder nor to have Aviation Authority, express or implied, to act for or bind Aviation Authority.

## 2. **Compensation.**

- 2.1 **Compensation.** For the Services rendered by the Consultant, compensation to the Consultant will not exceed and will be in accordance with the schedule of rates, fees and charges set forth in ***Exhibit "B"*** attached hereto and incorporated herein.
- 2.2 **Reimbursable Expenses.** The annual compensation includes all expenses to be incurred by Consultant as contemplated on the Effective Date of this Agreement. In the event that requirements for extraordinary travel arise then Consultant shall submit a request in writing in advance of the travel date(s) to the Chief Executive Officer, which request shall be handled in accordance with all applicable laws and section 430.02 of the Aviation Authority's Policies and Procedures Manual ("Travel Policy") as amended from time to time; however, such amount for international travel requires prior express written approval of the Aviation Authority.
- 2.3 **Statements.** The Consultant shall submit statements to Aviation Authority for all Services rendered hereunder. The statements shall include detailed information pertaining to any fees received or expected to be received by the Consultant or an affiliate of the Consultant during the same period covered by the statements in connection with or arising from Services performed by the Consultant for the Aviation Authority. Statements shall be in a form and with detail satisfactory to Aviation Authority, shall include the nature and amount of each fee, separated and identified as reasonably requested by the Aviation

Authority. The making of any willfully false statement by the Consultant in a billing statement shall be grounds for the termination of this Agreement by Aviation Authority.

- 2.4 **Maintenance of Records.** The Consultant shall maintain complete and accurate records relating to Services rendered pursuant to this Agreement. Cost records shall be kept in accordance with generally accepted accounting principles and practices consistently applied and in the Consultant's customary form and scope. Records and invoices for Services shall include all of the information required in order to determine the Consultant's Services performed hereunder, and shall identify the Services rendered in a manner reasonably acceptable to Aviation Authority.
- 2.5 **Records Availability.** All of the Consultant's records directly relating to Services shall, upon reasonable notice by Aviation Authority, be made available to Aviation Authority or its representative's at all reasonable times, to review, inspect, audit or copy the Consultant's records. If any such audit establishes that the Consultant has overstated Service fees, the amount of any overcharge paid by Aviation Authority as a result of an overstatement shall forthwith be refunded by the Consultant to Aviation Authority with interest thereon, at the prime rate as from time to time published by *The Wall Street Journal* on any knowingly overstated amount accrued from forty-five (45) days after the Aviation Authority's notice to the Consultant of overstatement.

### 3. **Term and Termination.**

- 3.1 **Term.** This Agreement shall become effective upon its execution by the Aviation Authority and shall continue in effect for **four (4) years**, unless terminated earlier as provided for herein or extended by an addendum hereto executed by both Parties. Upon mutual agreement by both parties the Aviation Authority shall have the option to renew this agreement for **three (3) periods of one (1) year each**.
- 3.2 **Termination on Default.** This Agreement may be terminated in whole or in part in writing by either party in the event of the failure or refusal of the other party to perform or do any obligation herein required of that party within five (5) days after written notice from the non-defaulting party. Liability arising from improper acts or omissions and any indemnity obligations shall survive the termination of this Agreement.
- 3.3 **Termination without Default.** Aviation Authority may terminate this Agreement for any reason or no reason upon not less than thirty (30) calendar days written notice of intent to terminate.
- 3.4 **Effect of Termination.** For any termination, the Consultant shall have no entitlement to recover anticipated profit for Services or other work not performed; provided however, the Aviation Authority shall pay the Consultant for Services performed up to the date of termination, as determined in the discretion of the Aviation Authority.

3.5 **Notice of Intent to Terminate.** Upon receipt of notice of intent to terminate from Aviation Authority pursuant to paragraphs 3.2 or 3.3 above, or upon the Consultant's giving of notice of intent to terminate pursuant to paragraph 3.2 above, the Consultant shall: (1) promptly discontinue all Services affected (unless Aviation Authority directs otherwise); and (2) deliver or otherwise make available to Aviation Authority all Work Product of Consultant generated performing the Services required by this Agreement, data, calculations, estimates, graphics, documents, photographs, reports, memoranda, other documents and instruments, and such other information and materials as may have been produced as original deliverables by the Consultant or by SubConsultants in performing Services under this Agreement, whether completed or in process.

3.6 **Aviation Authority's Right to Complete Terminated Services.** Upon termination pursuant to paragraphs 3.2 or 3.3 above, Aviation Authority may enter into an Agreement with another party for the party to complete the Services. In doing so, the Aviation Authority shall not waive any rights it may have to pursue any and all claims it may have against the Consultant arising out of the Consultant's performance hereunder.

#### 4. **Warranties and Representations of the Consultant.**

4.1 **State Code of Ethics.** The Consultant represents that it is familiar with the terms and conditions of Section 112.313, Florida Statutes, and the Consultant further represents and warrants unto Aviation Authority that to the best of its knowledge and good faith belief no director, officer, employee or agent of Aviation Authority or the City of Orlando, Florida (the "City") has any interest, either directly or indirectly, in the business of the Consultant to be conducted under this Agreement or the proceeds thereof. The Consultant further represents and warrants to Aviation Authority that it has not employed or retained any company or person, other than a bona fide employee working wholly for Consultant, to solicit or secure this Agreement, that it has not paid or agreed to pay any person, company, corporation, individual or Consultant, other than a bona fide employee working solely for the Consultant, any fee, commission, contributions, percentage, gift, or any other consideration contingent upon or resulting from the award or making of this Agreement, and that it has not agreed, as an express or implied condition for obtaining this Agreement, to employ or retain the Services of any Consultant or person in connection with carrying out this Agreement.

4.2 **Public Entity Crimes.** The Consultant represents that it is familiar with the terms and conditions of Section 287.133, Florida Statutes, and the Consultant further represents and warrants unto Aviation Authority that to the best of its knowledge and good faith belief that neither the Consultant nor any affiliate of the Consultant has ever been convicted of a public entity crime. The Consultant acknowledges receipt of the following notice:

A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a



contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a Consultant, supplier, Subconsultant, or the Consultant under a contract with any public entity, and may not transact business with any public entity in excess of \$25,000 for a period of 36 months from the date of being placed on the convicted vendor list.

- 4.3 **Public Records; Open Meetings.** The Consultant has been advised that the Aviation Authority, and its activities, are subject to (i) the Public Records Law, Chapter 119, Florida Statutes, which imposes broad disclosure requirements upon documents of the Aviation Authority with regard to documents deemed to be public records, and (ii) the Government-in-the-Sunshine-Law, Section 286.011, Florida Statutes, which requires, with limited exceptions, the Aviation Authority to conduct business in open meetings. The Consultant will cooperate with Aviation Authority to observe and comply with the requirements of said laws in performing the Services. The Consultant agrees that it will comply with all Aviation Authority policies and procedures in observing the requirements of said laws.
- 4.4 **Duty to the Aviation Authority.** To the extent permitted by professional codes of conduct, the Consultant will represent the Aviation Authority to the best of the Consultant's ability with respect to the performance of the Services, including without limitation in making recommendations to the Aviation Authority and will not make recommendations or otherwise perform Services based on criteria or factors other than the best interests of the Aviation Authority.
- 4.5 **Conflict of interest.** The Consultant shall comply at all times with the affirmative statement provided with its Proposal that during the period of this Agreement, the Consultant and its team members are not currently involved with any active agreement with any Aviation Specialty or developer that would be in conflict with the Aviation Authority, and agree not to enter in to any such agreement during the duration of this Agreement.
- 4.6 **Conflict of Interest After Performance.** The Consultant shall be prohibited from actively recruiting or soliciting Aviation Authority employees during the Consultant's performance of services and for 180 days after the conclusion of services.
- 4.7 **Consultant to Comply.** The Consultant shall comply at all times with the certifications, affirmative statements and other representations made by the Consultant in the Proposal in connection with this Agreement, unless waived in writing by the Aviation Authority; which certifying affirmative statements and other representations are incorporated herein by this reference.

5. **Member Protection; Waiver.**

No recourse under or upon any obligation, covenant or agreement contained in this Agreement, or any other agreements or documents pertaining to the Services of the Consultant or any SubConsultant hereunder, as such may from time to time be altered

or amended in accordance with the provisions hereof, or under any judgment obtained against Aviation Authority or by the enforcement of any assessment or by any legal or equitable proceeding by virtue of any statute or otherwise, under or independent of this Agreement, shall be had against any member, officer, employee, or agent, as such, past, present or future, of Aviation Authority either directly or through Aviation Authority or otherwise, for any claims arising out of this Agreement of the Services rendered pursuant to it, or for any sum that may be due and unpaid by Aviation Authority. Any and all personal liability of every nature, whether at common law or in equity, or by statute or by constitution or otherwise, of any Aviation Authority member, officer, employee or agent as such, to respond by reason of any act of omission on his or her part or otherwise for any claim arising out of this Agreement or the Services rendered pursuant to it, or for the payment for or to the Aviation Authority, or any receiver therefore or otherwise, of any sum that may remain due and unpaid by Aviation Authority, is hereby expressly waived and released as a condition of and as consideration for the execution of this Agreement.

**6. Indemnification.**

The successful Consultant shall indemnify, defend and hold completely harmless the Aviation Authority and the City of Orlando, Florida ("City"), and the members (including, without limitation, members of the Aviation Authority's Board and the City's Council, and members of the citizens' advisory committees of each), officers, employees and agents of each, from and against any and all liabilities (including statutory liability and liability under Workers' Compensation Laws), losses, suits, claims, demands, judgments, fines, damages, costs and expenses (including all costs for investigation and defense thereof, including, but not limited to, court costs, paralegal and expert fees and reasonable attorneys' fees) which may be incurred by, charged to or recovered from any of the foregoing: (a) by reason or on account of damage to or destruction or loss of any property of Aviation Authority or the City, or any property of, injury to or death of any person resulting from or arising out of or in connection with the performance of this Contract, or the acts or omissions of Consultant's directors, officers, agents, employees, Sub-Consultants, licensees or invitees, regardless of where the damage, destruction, injury or death occurred, unless such liability, loss, suit, claim, demand, judgment, fine, damage, cost or expense was proximately caused solely by Aviation Authority's negligence or by the joint negligence of Aviation Authority and any person other than Consultant or Consultant's directors, officers, agents, employees, SubConsultants, licensees, or invitees, or (b) arising out of or in connection with the failure of Consultant to keep, observe or perform any of the covenants or agreements in this Contract which are required to be kept, observed or performed by Consultant, or (c) arising out of or in connection with any claim, suit, assessment or judgment prohibited by this condition or in favor of any person described in below, or (d) arising out of or in connection with any action by Consultant or its directors, officers, agents, employees, SubConsultants, licensees or invitees. Aviation Authority agrees to give Consultant reasonable notice of any suit or claim for which indemnification will be sought hereunder, to allow Consultant or its insurer to compromise and defend the same to the extent of its interests, and to reasonably cooperate with the defense of any such suit or claim. In carrying out its obligations under this section, Consultant shall engage counsel reasonably acceptable to Aviation Authority. In any suit, action, proceeding, claim or demand brought in respect of which the Aviation Authority may pursue indemnity, the Aviation Authority shall have the right

to retain its own counsel. The fees and expenses of such counsel shall be at the expense of the Aviation Authority unless the Consultant and the Aviation Authority shall have mutually agreed to another arrangement. In the event Consultant fails, within a reasonable time to retain counsel satisfactory to the Aviation Authority, the Aviation Authority may retain counsel and Consultant shall be responsible for such legal fees, costs and expenses. In the event, the Aviation Authority and the Consultant are both named parties in any such proceeding and, in the sole judgment of the Aviation Authority, representation of both the Aviation Authority and the Consultant by the same counsel would be inappropriate due to actual or potential differing interests between them then Aviation Authority shall obtain its own counsel and Consultant shall be responsible for such legal fees, costs and expenses. The indemnification provisions of this Section 5 shall survive the expiration or earlier termination of this Contract with respect to any acts or omissions occurring during the term of the Contract. No recourse under or upon any obligation, covenant or agreement contained in this Contract, or any other agreement or document pertaining to the work or services of the Consultant hereunder, as such may from time to time be altered or amended in accordance with the provisions hereof, or any judgment obtained against Aviation Authority, or the City, or by the enforcement of any assessment or by any legal or equitable proceeding by virtue of any statute or otherwise, under or independent of this Contract, shall be had against any member (including, without limitation, members of the Aviation Authority's Board or the City's Council, or members of the citizens advisory committees of each), any officer, employee or agent, as such, past, present, or future of Aviation Authority or City, either directly or through the Aviation Authority or the City or otherwise for any claim arising out of or in connection with this Contract or the work or services conducted pursuant to it, or for any sum that may be due and unpaid by Aviation Authority. Any and all personal liability of every nature, whether at common law or in equity, or by statute or by constitution or otherwise, of any such member, officer, employee, or agent, as such, to respond by reason of any act or omission on his or her part or otherwise for any claim arising out of or in connection with this Contract or the work or services conducted pursuant to it, or for the payment for or to Aviation Authority, or any receiver therefore or otherwise, of any sum that may remain due and unpaid by the Aviation Authority, is expressly waived and released as a condition of and in consideration of the execution of this Contract and the, promises made to Consultant pursuant to this Contract. In any and all claims against the Aviation Authority or the City, or any of their officers, members, agents, servants or employees, by any employee of the Consultant, any Sub-Consultant, anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable, the indemnification obligation of Consultant under this Section shall not be limited in any way by any limitation on the amount or type of damages, compensation or benefit payable by or for the Consultant or any SubConsultant under Workers' Compensation Acts, disability benefit acts or other employee benefit acts. No provisions of this condition shall be construed to negate, abridge, or otherwise reduce any other right of indemnity that Aviation Authority may have as to any party or person described therein.

## **7. Insurance.**

7.1 Without limiting its liability hereunder, the Consultant shall procure and maintain at its sole expense during the term of this Agreement insurance of the types and in the minimum amounts and deductibles set forth on **Exhibit "C"** attached

hereto and incorporated herein by reference. Without limiting the foregoing, the Consultant shall maintain a professional liability policy and comprehensive general liability policy which shall include contractual liability on a blanket or specific basis to cover the indemnification provided under Paragraph 6 hereinabove, and all insurance required hereunder shall be in a form satisfactory to Aviation Authority and shall be written by a company or companies licensed to transact insurance in the State of Florida and satisfactory to the Aviation Authority.

- 7.2 The Consultant agrees that the Aviation Authority and the City and its members (including, without limitation, members of the Aviation Authority's Board and the City's Council and members of the citizens' advisory committees of each), officers, employees and agents shall be named as additional insureds under such policies of insurance, except professional liability insurance. Such insurance shall provide that it is primary insurance as respects any other valid insurance Aviation Authority may possess including any self-insured retention or deductible Aviation Authority may have, and that any other insurance Aviation Authority does possess shall be considered excess insurance only. This insurance shall also provide that it shall act for each insured and each additional insured as though a separate policy had been written for each; provided, however, that this provision shall not operate to increase the policy limits of the insurance.
- 7.3 Prior to commencing any work under this Agreement and at least ten (10) days prior to the expiration of any certificates previously provided hereunder, the Consultant shall, upon request, provide to Aviation Authority certificates evidencing the maintenance of all insurance required hereunder, and each such certificate shall provide that no material alteration or cancellation, including expiration and non-renewal, shall be effective until at least thirty (30) days after receipt of written notice thereof by Aviation Authority. The Consultant shall maintain and/or cause Sub-Consultants to maintain Workers' Compensation Insurance coverage for all employees in accordance with statutory limits.
- 7.4 The Aviation Authority is currently contracted with a third party for the management of all insurance certificates related to Aviation Authority Contracts. Contractors who enter into a Contract with the Aviation Authority will be contacted directly by the third party vendor for insurance certificates and related matters such as expired certificates. An introductory letter will be sent instructing each Contractor of the proper procedures for processing updated insurance certificates as well as any other insurance related matter that may arise over the term of the Contract. Contractors will respond as directed in the introductory letter as well as any further instructions they may receive.

**8. Compliance with Nondiscrimination Requirements.**

During the performance of this Agreement, the Consultant, for itself, its assignees and successors in interest agrees as follows:

- 8.1 **Compliance with Regulations.** The Consultant shall comply with the Regulations relative to nondiscrimination in federally assisted programs of the Department of Transportation (hereinafter, "DOT") Title 49, Code of Federal Regulations, Part 21, as they may be amended from time to time (hereinafter referred to as the "Regulations"), which are herein incorporated by reference and made a part of this Agreement.
- 8.2 **Nondiscrimination.** The Consultant, with regard to the work performed by it during the Agreement, shall not discriminate on the grounds of race, color, or national origin in the selection and retention of any Sub-Consultant, including procurement of materials and leases of equipment. The Consultant shall not participate either directly or indirectly in the discrimination prohibited by Section 21.5 of the Regulations, including employment practices when the Agreement covers a program set forth in Appendix B of the Regulations.
- 8.3 **Solicitations for Subcontracts, Including Procurement of Materials and Equipment.** In all solicitations either by competitive bidding or negotiation made by the Consultant for work to be performed under a subcontract, including procurement of materials or leases of equipment, each potential SubConsultant or supplier shall be notified by the Consultant of the Consultant's obligations under this Agreement and the Regulations relative to nondiscrimination on the grounds of race, color or national origin.
- 8.4 **Information and Reports.** The Consultant shall provide all information and reports required by the Regulations or directives issued pursuant thereto and shall permit access to its books, records, accounts, other sources or information, and its facilities as may be determined by the Aviation Authority or the Federal Aviation Administration ("FAA") to be pertinent to ascertain compliance with such Regulations, orders and instructions. Where any information required of the Consultant is in the exclusive possession of another who fails or refuses to furnish this information, the Consultant shall so certify to the Aviation Authority or the FAA, as appropriate, and shall set forth what efforts it has made to obtain the information.
- 8.5 **Sanctions for Noncompliance.** In the event of the Consultant's noncompliance with the nondiscrimination provisions of this Agreement, the Aviation Authority shall impose such sanction as it or the FAA may determine to be appropriate, including but not limited to:
- 8.5.1 Withholding of payments to the Consultant under the Agreement until the Consultant complies.
- 8.5.2 Cancellation, termination or suspension of the Agreement, in whole or in part.
- 8.6 **Incorporation of Provisions.** The Consultant shall include the provisions of subsections 8.1 through 8.5 in every subcontract, including procurement of materials and leases of equipment, unless exempt by the Regulations or directives issued pursuant thereto. The Consultant shall take such action with respect to any subcontract or procurement as the Aviation Authority or the FAA

may direct as a means of enforcing such provisions including sanctions for noncompliance. Provided, however, that in the event a Consultant becomes involved in, or is threatened with, litigation with a SubConsultant or supplier as a result of such direction, the Consultant may request the Aviation Authority to enter into such litigation to protect the interest of the Aviation Authority and, in addition, the Consultant may request the United States to enter into such litigation to protect the interests of the United States. The Consultant assures Aviation Authority that it will comply with the pertinent statutes, Executive Orders and such rules as are promulgated to assure that no person shall, on the grounds of race, creed, color, national origin, sex, age, marital status or handicap be excluded from participating in any activity conducted with or benefiting from Federal assistance. This provision shall bind the Consultant from the period beginning with the initial solicitation through the completion of the Agreement.

**9. Title VI List of Pertinent Nondiscrimination Acts and Authorities.**

During the performance of this contract, the Consultant, for itself, its assignees, and successors in interest (hereinafter referred to as the "Consultant") agrees to comply with the following nondiscrimination statutes and authorities; including but not limited to:

- 9.1 Title VI of the Civil Rights Act of 1964 (42 U.S.C. § 2000d *et seq.*, 78 stat. 252), (prohibits discrimination on the basis of race, color, national origin);
- 9.2 49 CFR part 21 (Non-discrimination In Federally-Assisted Programs of The Department of Transportation—Effectuation of Title VI of The Civil Rights Act of 1964);
- 9.3 The Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, (42 U.S.C. § 4601), (prohibits unfair treatment of persons displaced or whose property has been acquired because of Federal or Federal-aid programs and projects);
- 9.4 Section 504 of the Rehabilitation Act of 1973, (29 U.S.C. § 794 *et seq.*), as amended, (prohibits discrimination on the basis of disability); and 49 CFR part 27;
- 9.5 The Age Discrimination Act of 1975, as amended, (42 U.S.C. § 6101 *et seq.*), (prohibits discrimination on the basis of age);
- 9.6 Airport and Airway Improvement Act of 1982, (49 USC § 471, Section 47123), as amended, (prohibits discrimination based on race, creed, color, national origin, or sex);
- 9.7 The Civil Rights Restoration Act of 1987, (PL 100-209), (Broadened the scope, coverage and applicability of Title VI of the Civil Rights Act of 1964, The Age Discrimination Act of 1975 and Section 504 of the Rehabilitation Act of 1973, by expanding the definition of the terms "programs or activities" to include all of the programs or activities of the Federal-aid recipients, sub-recipients and Consultants, whether such programs or activities are Federally funded or not);
- 9.8 Titles II and III of the Americans with Disabilities Act of 1990, which prohibit discrimination on the basis of disability in the operation of public entities, public and private transportation systems, places of public accommodation, and certain testing entities (42 U.S.C. §§ 12131 – 12189) as implemented by Department of Transportation regulations at 49 CFR parts 37 and 38;

- 9.9 The Federal Aviation Administration's Non-discrimination statute (49 U.S.C. § 47123) (prohibits discrimination on the basis of race, color, national origin, and sex);
- 9.10 Executive Order 12898, Federal Actions to Address Environmental Justice in Minority Populations and Low-Income Populations, which ensures non-discrimination against minority populations by discouraging programs, policies, and activities with disproportionately high and adverse human health or environmental effects on minority and low-income populations;
- 9.11 Executive Order 13166, Improving Access to Services for Persons with Limited English Proficiency, and resulting agency guidance, national origin discrimination includes discrimination because of limited English proficiency (LEP). To ensure compliance with Title VI, you must take reasonable steps to ensure that LEP persons have meaningful access to your programs (70 Fed. Reg. at 74087 to 74100);
- 9.12 Title IX of the Education Amendments of 1972, as amended, which prohibits you from discriminating because of sex in education programs or activities (20 U.S.C. 1681 et seq).

**10. Federal Fair Labor Standards Act.**

All contracts and subcontracts that result from this contract incorporate by reference the provisions of 29 CFR part 201, the Federal Fair Labor Standards Act (FLSA), with the same force and effect as if given in full text. The FLSA sets minimum wage, overtime pay, recordkeeping, and child labor standards for full and part time workers. The Consultant has full responsibility to monitor compliance to the referenced statute or regulation. The Consultant must address any claims or disputes that arise from this requirement directly with the U.S. Department of Labor – Wage and Hour Division.

**11. Occupational Safety and Health Act of 1970.**

All contracts and subcontracts that result from this contract incorporate by reference the requirements of 29 CFR Part 1910 with the same force and effect as if given in full text. Consultant must provide a work environment that is free from recognized hazards that may cause death or serious physical harm to the employee. The Consultant retains full responsibility to monitor its compliance and their Sub-Consultant's compliance with the applicable requirements of the Occupational Safety and Health Act of 1970 (20 CFR Part 1910). Consultant must address any claims or disputes that pertain to a referenced requirement directly with the U.S. Department of Labor – Occupational Safety and Health Administration.

**12. Whistle Blower Reporting Line.**

The Aviation Authority is committed to the highest level of integrity in its operations and is fully committed to protecting the organization, its operations, and its assets against fraud, waste or abuse. The Aviation Authority has established a Whistle Blower Reporting Line with a third-party service provider as a means for employees, Consultants, vendors, tenants and the general public to report suspected fraud, waste or abuse in connection with Aviation Authority operations. Should Consultant suspect any fraud, waste or abuse in connection with any work under this Agreement, including any work of its SubConsultants or laborers, it shall promptly report such activity to

(877) 370-6354, through email to [GOAA@integritycounts.ca](mailto:GOAA@integritycounts.ca), or through the online reporting form [www.integritycounts.ca/org/GOAA](http://www.integritycounts.ca/org/GOAA). The Consultant shall include this reporting requirement in all Sub-Consultants and vendor agreements. The Consultant is further encouraged to report any suspected fraud, waste or abuse it suspects in connection with any other airport operation or project.

**13. Florida Law.**

This Agreement was made in the State of Florida and shall be governed by and construed in accordance with Florida law.

**14. Remedies.**

In the event of default, in addition to any other remedy available to the non-defaulting party, the non-defaulting party pursuant to the terms may terminate this Agreement in accordance with Section 3.2. Any such termination shall not waive or replace any other legal or equitable remedies available to the non-defaulting party. All remedies provided in this Agreement shall be deemed cumulative and additional and not in lieu of or exclusive of each other or any other remedy available to any party at law or in equity.

**15. Attorney's Fees and Costs.**

To the extent allowable by law, in the event that any legal proceedings at law or in equity arising hereunder or in connection herewith (including any appellate proceedings), the prevailing party shall be awarded costs, reasonable expert fees and reasonable attorney's fees incurred in connection with such legal proceedings as determined by a court of competent jurisdiction.

**16. Venue and Waiver of Jury Trial.**

The appropriate venue for any actions arising out of this Agreement will be any court of competent jurisdiction in Orange County, Florida. Such claims, disputes or other matters shall not be subject to arbitration without the prior written consent of both Aviation Authority and the Consultant. The parties hereby agree that process shall be served on the Consultant and Aviation Authority in the manner prescribed by applicable law. To encourage prompt and equitable resolution of any litigation that may arise hereunder, the parties hereby waive any rights and either party may have to a trial by jury of any such litigation.

**17. Transfers, Assignments and Subcontracts.**

The Consultant shall not transfer or assign any of its rights hereunder except as otherwise authorized in this Agreement or any of its obligations hereunder to third parties without the prior written approval of Aviation Authority. Aviation Authority shall be entitled to withhold such approval for any reason or for no reason. Except as limited by the provisions of this paragraph, this Agreement shall inure to the benefit of and be binding upon Aviation Authority and the Consultant, and their respective successors and assigns.



**18. Miscellaneous Provisions.**

- 18.1 The Consultant shall promptly observe, and comply with applicable provisions of all federal, state and local laws, rules and regulations that govern or apply to the services rendered by the Consultant hereunder.
- 18.2 The Consultant shall produce and keep in force during the term of this Agreement all necessary licenses, registrations, certificates, permits and other authorization as are required by law in order for the Consultant to render the services required hereunder.
- 18.3 All information and documents received from the Consultant in response to this RFP will become the property of the Aviation Authority, will not be returned to the Consultant, and will be incorporated in the final Agreement in the event of Agreement award. Any work product produced as part of the Agreement will become the exclusive property of the Aviation Authority.
- 18.4 If Aviation Authority determines that modifications to this Agreement are required in order to qualify for federal or state funding for the services to be rendered by the Consultant hereunder, and if the Consultant is unable to comply within a reasonable time with applicable federal and state laws and regulations governing the grant of such funds for services to be rendered hereunder, then notwithstanding anything else herein contained, Aviation Authority shall have the right, by giving written notice to the Consultant, to terminate this Agreement forthwith.
- 18.5 The Consultant assures that it will comply with pertinent statutes, Executive Orders and such rules as are promulgated to assure that no person shall, on the grounds of race, creed, color, national origin, sex, age or handicap be excluded from participating in any activity conducted with or benefitting from Federal assistance. This Provision obligates the Consultant or its assigns, for the period during which Federal assistance is extended to the airport program, except where Federal assistance is to provide, or is in the form of personal property or real property or interest therein or structures or improvements thereon. In these cases, the Provision obligates the Consultant for the longer of the following periods: (a) the period during which the property is used by the Aviation Authority or any transferee for a purpose for which Federal assistance is extended, or for another purpose involving the provision of similar services or benefits; or (b) the period during which the Aviation Authority or any transferee retains ownership or possession of the property. In the case of a construction project, this Provision binds the Consultant from the Proposal solicitation period through the completion of the Agreement.
- 18.6 Consultant and its Sub-Consultants, if any, shall maintain complete and accurate books and records in accordance with generally accepted accounting principles, consistently applied, and shall be in a form reasonably acceptable to the Aviation Authority's Chief Executive Officer or designee. Consultant and its Sub-Consultants shall account for all expenses of any nature related to transactions in connection with this Agreement in a manner which segregates in detail those transactions from other transactions of the Consultant and Sub-

Consultants and which support the amounts reported and/or invoiced to the Aviation Authority. At a minimum, Consultant's and Sub-Consultant's accounting for such expenses and transactions shall include such records in the form of electronic media compatible with or convertible to a format compatible with computers utilized by the Aviation Authority at its offices; a computer run hard copy; or legible microfilm or microfiche, together with access to the applicable reader. All such books and records and computerized accounting systems, shall upon reasonable notice from Aviation Authority be made available in Orange County, Florida, for inspection, examination, audit and copying by Aviation Authority through and by its duly authorized representatives at any time for up to four (4) years after the year to which books and records pertain. Such inspection, examination, or audit may include, but is not limited to a review of the general input, processing, and output controls of information systems, using read only access, for all computerized applications used to record financial transactions and information. Consultant and Sub-Consultant shall freely lend its own assistance in a timely manner in making such inspection, examination, audit, or copying and, if such records are maintained in electronic and other machine readable format, shall provide the Aviation Authority and/or its representative such assistance as may be required to allow complete access to such records. The Chief Executive Officer may require Consultant and Sub-Consultants to provide other records the Chief Executive Officer, in his or her sole discretion, deems necessary to enable the - to perform an accurate inspection, examination or audit of expenses incurred in and transactions related to performance of this Agreement. Such records shall be provided within thirty (30) days of request thereof. In the event that expenses incurred or reimbursed are found by such inspection, examination, or audit to have been overpaid, Consultant and its Sub-Consultants agree that such amounts shall be payable to the Aviation Authority. If, prior to the expiration of the above-stated four (4) year record retention period, any audit or investigation is commenced by the Aviation Authority, or any claim is made or litigation commenced relating to this Agreement by the Aviation Authority, the Consultant, or a third party, the Consultant shall continue to maintain all such records, and the Aviation Authority shall continue to have the right to inspect such records in the manner stated above, until the inspection, examination, audit, claim, or litigation is finally resolved (including the determination of any and all appeals or the expiration of time for an appeal). This provision shall survive the expiration or earlier termination of this Agreement. In the event of any conflict between any provision of this Agreement and generally accepted accounting principles or generally accepted auditing standards, the provisions of this Agreement shall control even where this Agreement references such provisions or standards. In particular, without limitation, Consultant and Sub-Consultants shall maintain all records required under this Agreement to the full extent required hereunder, even if some or all such records would not be required under such generally accepted accounting principles or auditing standards. If as a result of an inspection, examination or audit, it is established that amounts are due from the Consultant to the Aviation Authority, Consultant shall forthwith, upon written demand from the Aviation Authority, pay the Aviation Authority such amount, together with interest on the amount due at the rate of eighteen (18%) percent per annum, or if less, the maximum rate of interest allowed by law, from the date such additional amounts

were overpaid by the Aviation Authority. Further if such inspection, examination or audit establishes that the Consultant has over billed such amounts for any Agreement period by two (2%) percent or more, then the entire expense of such inspection, examination or audit shall be paid by the Consultant.

- 18.7 In the course of performing the Agreement work, Consultant may gain access to Sensitive Data Types including but not limited to Personal Identifiable Information (PII), Personal Health Information (PHI), Sensitive Security Information (SSI), Payment Card Industry (PCI), Financial Information and/or other confidential information of the Aviation Authority. Consultant agrees to hold such information in confidence and to make such information known only to its employees, affiliates, agents, Sub-Consultants, and Sub-Consultants who have a legitimate need to know such information and who are under a similar obligation of confidentiality. The Consultant shall seek the Aviation Authority's prior written consent before releasing, disclosing, or otherwise making such confidential information available to any other person. This provision shall not apply to information required to be released by applicable law, legal subpoena, or other lawful process. The Consultant must notify the Aviation Authority as soon as practicable in the event Consultant is notified of or discovers any compromise and/or breach or suspected breach, such as unauthorized access to, theft of, misuse of and unintentional releases or of any security/sensitive data types, or confidential information of the Aviation Authority and/or Individuals ("Data Breach") involving Consultant controlled systems such as, but not necessarily limited to, web sites, transmission infrastructure, voice response unit, and retrieval and storage systems. This notification should include, to the extent known, the type of Data Breach, type of data compromised and/or breached, and results of any forensic investigation. To the extent Consultant is responsible for the Data Breach and upon mutual agreement of the parties, Consultant shall be responsible to implement, in coordination with the Aviation Authority, a commercially reasonable Remediation Plan to address and respond to a Data Breach. Such commercially reasonable "Remediation Plan" will include certain administrative requirements associated with addressing and responding to such Data Breach to the extent necessary under the circumstances, and may include but is not necessarily limited to: (i) preparation and mailing or other transmission of legally required notifications, (ii) preparation and mailing or other transmission or communication to impacted Individuals such as may be required by applicable law or regulation; (iii) offering potentially impacted Individuals the opportunity to enroll in a credit monitoring service offered by a vendor of Consultant's choice for a two-year period, or other period as required by applicable law, at no charge to the impacted Individuals; and (iv) payment of applicable reasonable legal, audit, accounting and administrative expenses associated with the investigation, notifications and recovery arising from the Data Breach. The remedies provided for in the Remediation Plan shall be in addition to any other remedies available to the Aviation Authority under this Agreement. The provisions of this Section 18.6 shall survive the expiration or earlier termination of the Agreement.

18.8 **IF THE CONSULTANT HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONSULTANT'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENTT, PLEASE USE THE LINK TO CONTACT THE AVIATION AUTHORITY'S CUSTODIAN OF PUBLIC RECORDS: <http://orlandoairports.net/publicrecords>; PHONE NUMBER: (407) 825-2400; AND MAILING ADDRESS: GREATER ORLANDO AVIATION AUTHORITYY, PUBLIC RECORDS, ONE JEFF FUQUA BOULEVARD, ORLANDO, FL 32827.** A Contractor with an Aviation Authority Contract for services must comply with Florida Statute, Chapter 119.071, specifically to: Keep and maintain public records that ordinarily and necessarily would be required by the Aviation Authority in order to perform the service. Upon request from the Aviation Authority's custodian of public records, provide the Aviation Authority with a copy of the requested records or allow the access to public records to be inspected or copied within a reasonable time on the same terms and conditions that the Aviation Authority would provide the records and at a cost that does not exceed the cost provided in Chapter 119.07, Florida Statutes, or as otherwise provided by law. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the Contract term and following completion of the Contract if the Contractor does not transfer the records to the Aviation Authority. Upon completion of the Contract, meet all requirements for retaining public records and transfer, at no cost to the Aviation Authority, all public records in possession of the Contractor or keep and maintain public records required by the Aviation Authority to perform the service. If the Contractor transfers all public records to the Aviation Authority upon completion of the Contract, the Contractor shall, upon termination of the Contract, destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Contractor keeps and maintains public records upon completion of the Contract, the Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the Aviation Authority, upon request from the Aviation Authority's custodian of public records, in a format that is compatible with the information technology systems of the Aviation Authority. If a Contractor does not comply with a public records request, the Aviation Authority shall enforce the Contract provisions in accordance with the Contract.

**19. Purchasing Agreements with Other Governmental Entities**

The Aviation Authority permits the awarded Consultant to extend the pricing, terms and conditions of this solicitation to other governmental entities at the Consultant's discretion. Each governmental entity that utilizes this solicitation or resulting Agreement will be responsible for execution of its own requirements with the awarded Consultant.

**20. Entire Agreement.**

This Agreement constitutes the entire agreement between the parties and shall supersede and replace all prior agreements or understandings, written or oral, relating to the matters set forth herein.

**21. Amendment; Waiver.**

Except for the Aviation Authority's right to reduce the Scope of Services as provided in paragraph 1.1 above, this Agreement shall not be amended or modified other than in an amendment writing signed by the parties hereto. The Aviation Authority and the Consultant reserve the right to amend this Agreement in writing at any time by such mutually executed amendment. Failure by any party at any time to enforce any default or right reserved to it or to require the performance of any of the terms, covenants or provisions hereof by the other party at the time designated, shall not be deemed a waiver of any such default or right to which the party is entitled, nor shall it in any way affect the right of the party to enforce such provisions thereafter.

**22. Severability.**

If any term or provision of this Agreement shall be found to be unenforceable, then, notwithstanding, this Agreement shall remain in full force and effect and such term or provision shall be deemed stricken.

**23. Time of the Essence.**

Time is of the essence in the performance of this Agreement.

**24. Execution and Counterparts.**

To facilitate execution, the parties hereto agree that this Agreement and any Amendments may be executed and tele-copied to the other party and that the execution telecopy shall be binding and enforceable as an original. The parties agree to fully execute two (2) originals of this Agreement. This Agreement may be executed in as many counterparts as may be required and it shall not be necessary that the signature of, or on behalf of, each party, or that the signatures of all persons required to bind any party, appear on each counterpart; it shall be sufficient that the signature of, or on behalf of, each party, or that the signatures of the persons required to bind any party, appear on one or more of such counterparts. All counterparts shall collectively constitute a single agreement.

**25. Notices.**

All notices under this Agreement shall be in writing and shall be given by United States Certified Mail Return Receipt Requested postage prepaid addressed to:

To the Consultant:                   **Alliant Orlando  
Alliant Insurances Services, Inc.  
271 N. Pennsylvania Ave. Suite 5  
Winter Park, FL 32789**

With copy to:                           Alliant Insurances Services, Inc.  
701 B Street 6th Floor  
San Diego, CA 92101

To Aviation Authority:      **Greater Orlando Aviation Authority**  
   **One Jeff Fuqua Boulevard**  
   **Orlando, Florida 32827-4399**  
   **Attention: Chief Executive Officer**

The Aviation Authority's Chief Executive Officer, or designee, shall act as Aviation Authority's agent with respect to the Services to be rendered by the Consultant hereunder and shall transmit instructions, receive information, and communicate Aviation Authority's policies and decisions to the Consultant regarding such Services. Either party may change the designee or address for notices by written notice given in accordance with the terms of this Section 24.

**IN WITNESS WHEREOF**, the parties hereto have caused this Agreement to be executed the day and year first mentioned above.

**GREATER ORLANDO AVIATION AUTHORITY**

ATTEST

By: \_\_\_\_\_

By: \_\_\_\_\_

Title: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_

**"CONSULTANT"**

**ALLIANT INSURANCE SERVICES, INC.**

ATTEST

By: DocuSigned by:  
Alan Pickering  
B7E6AA0C9EE49C...

By: DocuSigned by:  
Peter Carpenter  
15BA5A84A2E1461...

Title: Alan Pickering  
Operations Representative Lead

Title: Peter Carpenter  
COO, Executive Vice President

Date: 2/8/2023

Date: 2/8/2023

Approved as to Form and Legality  
this 15 day of February, 2023  
Nelson Mullins Riley & Scarborough, LLP  
By Joel Macher  
Greater Orlando Aviation Authority

**1. Exhibit "A" – Scope of Services**

- a. Provide estimates of renewal rates for benefit plans and services to assist the Authority with forecasting and budgeting.
- b. Assist in the competitive proposal process for the Aviation Authority's benefit plans and related Third Party Administrator (TPA) providers, including proposal development, evaluation, and recommendation.
- c. Solicit and negotiate premiums, renewal rates, service, benefit levels, plan design, special terms and conditions, etc. with carriers and providers for benefit plans in coordination with the Human Resources (HR) Staff. Initiate all contract renewals.
- d. Apprise the Aviation Authority of local and national benefit trends, innovative ideas and recommend new products, designs, programs, and services. Present benchmarks, industry standards, and best practices.
- e. Provide ongoing analysis of plan designs (including retiree coverages), cost containment strategies, available cost sharing alternatives, competitive position, and funding methods, including but not limited to self-funding.
- f. Timely inform the Aviation Authority of changing legislation, regulatory and legal decisions affecting employee benefits. Advise and discuss methods to comply with these changes including any reporting requirements.
- g. Assist with maintaining regulatory compliance as it relates to providing benefit plan coverage for active employees, and retirees [Other Post-Employee Benefits (OPEB)], including advice on data practices, records retention and privacy issues.
- h. Review and monitor contracts, plan documents and policies to ensure accuracy, completeness, and compliance with the law. Monitor claim performance according to any contractual performance standards and recommend the establishment of additional performance standard agreements with carriers/providers where appropriate.
- i. Review and analyze relevant data to ensure the Aviation Authority is receiving optimum service and benefits from all carriers and providers.
- j. Respond promptly and accurately to questions from Aviation Authority representatives.
- k. Provide ongoing assistance with benefit related education for employees and the Aviation Authority's HR Staff.
- l. Assist in developing wellness initiatives for employees to include assisting with coordination of employee health events and wellness measurement tools.



- m. Assist with the creation and implementation of communication materials (pamphlets, brochures, presentations, etc.) for new or changed programs, including Open Enrollment and health event materials. Assist the Aviation Authority's HR Staff with development of employee benefits statements.
- n. Provide open enrollment support to include on-line enrollment, explanation of benefit options and conducting and/or attending enrollment meetings, as needed.
- o. Coordinate employee communication and conduct employee information meetings as new programs are implemented.
- p. Provide consulting advice and cost impact of proposed changes to benefits as requested. Attend the Aviation Authority's Board Meeting(s) (usually September) when Group Health/Benefit Plans are presented for approval. Make presentations to Senior Management and/or Board if required.
- q. Meet with the Aviation Authority staff on a quarterly basis.
- r. Serve as a liaison with carriers and providers when service problems or claims issues occur. Provide support to employees on benefit questions and claim issues.
- s. Conduct benefit surveys as requested and make recommendations based on data.
- t. Review, monitor and make recommendations, when needed, on the efficiency measures for streamlining plan processes.
- u. Arrange for the retention of other professional consultants as may be needed and approved by the Aviation Authority.
- v. Provide such other benefit advice and services to the Aviation Authority as is deemed necessary and approved by the Aviation Authority.
- w. Complete analysis of all funding strategies and potential administrative differences.
- x. Provide guidance through any benefits related transition including, development of an action plan/timeline, drafting and/or review of plan documents and policies, stop loss recommendations/acquisition, draft and/or review of administrative service agreements and advice regarding all matters concerning compliance and risk mitigation, etc. For self-insured analyses, review and negotiate competitive pharmacy terms and pricing.

**Additional Services**

If during the Agreement period, Additional Services are needed beyond the Scope of Services, the Consultant may, at the option of the Aviation Authority, be engaged to perform these services based on the Hourly Rates provided in the Consultant's Fee Form submitted with its response. All Additional Services shall be documented by engagement memoranda to be approved by the Authority by issuing an Amendment to this Agreement.

**Non-Exclusive Services**

This is a non-exclusive Agreement. During the term of this Agreement, and any extensions thereof, the Aviation Authority reserves the right to contract for another provider for similar services as it determines necessary in its sole discretion.

## 2. Exhibit "B" - Proposal Schedule of Fees

Each Proposer shall submit its fixed fee for providing the Transition Plan services for the period from January 1, 2023 through March 31, 2023:

<b>Transition Plan</b>	<b>\$ <u>0</u></b>
------------------------	--------------------

### **Annual Fixed Fees**

Each Proposer must provide a Fixed Annual Fee for services as specified per Section 2.0 Scope of Services, including but not limited to labor, travel, materials and overhead cost for providing Benefit Consulting Services. Out-of-pocket expenses incurred by Proposer will not be separately reimbursed.

DESCRIPTION	YEAR 1 FIXED FEE (04/01/2023 – 03/31/2024)	YEAR 2 FIXED FEE (04/01/2024 – 03/31/2025)	YEAR 3 FIXED FEE (04/01/2025 – 03/31/2026)	YEAR 4 FIXED FEE (04/01/2026 – 03/31/2027)
Scope of Services	\$89,815.00	\$89,815.00	\$94,306.00	\$94,306.00

### **Additional Services**

Each Proposer shall provide its Hourly Rates for Additional Services as described in Section 2.2 that are not provided for in the Scope of Services, to be performed by the Engagement Team. These Additional Services shall be requested by and approved in advance in writing by the Aviation Authority.

TITLE OF ENGAGEMENT TEAM MEMBER	HOURLY RATE
Consultant	\$ <u>375.00</u> per hour
Account Exec/Manager	\$ <u>250.00</u> per hour

### 3. Exhibit "C" - Insurance

<u>Type</u>	<u>Amount</u>
Professional Liability	\$1,000,000
General Liability	\$1,000,000
Automobile Liability	\$1,000,000
Workers Compensation	Statutory limits
Employers Liability	\$100,000 each accident, \$500,000 disease policy limit \$100,000 disease each employee

Self-Insured Retention: Consultant's commercial general liability and professional services liability insurance policies shall not be subject to a self-insured retention exceeding \$100,000, unless approved by the Aviation Authority's Chief Executive Officer. Consultant's automobile liability insurance policies shall not be subject to a self-insured retention exceeding \$10,000, unless approved by the Aviation Authority's Chief Executive Officer.

Additional Insured Endorsement: The Company agrees and shall cause the Aviation Authority and the City and their members (including, without limitation, members of the Aviation Authority's Board and the City's Council and member of the citizens' advisory committees of each), officers, employees, and agents to be named as additional insureds under such policy or policies of commercial general and automobile liability insurance.

If coverage is on a claims-made basis, the Company will maintain coverage applicable to the Services performed for two (2) years after expiration of the Agreement.

Insurers shall be licensed to transact insurance in the State of Florida. This requirement may be waived in the sole discretion of the Chief Executive Officer or if the insurer is rated by A.M. Best at A-/VIII or better.



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
**01/19/2023**

**THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.**

**IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).**

<b>PRODUCER</b> License # 0C36861 <b>Alliant Insurance Services, Inc.</b>	<b>CONTACT NAME:</b> michele.rodriguez@alliant.com <b>PHONE</b> (A/C, No, Ext): _____ <b>FAX</b> (A/C, No): _____ <b>E-MAIL ADDRESS:</b> _____														
<b>INSURED</b> <b>Alliant Holdings, LP</b> <b>c/o Alliant Insurance Services, Inc.</b> <b>18100 Von Karman, 10th Floor</b> <b>Irvine, CA 92612</b>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center;"><b>INSURER(S) AFFORDING COVERAGE</b></td> <td style="text-align: center;"><b>NAIC #</b></td> </tr> <tr> <td><b>INSURER A : Evanston Insurance Company</b></td> <td style="text-align: center;"><b>35378</b></td> </tr> <tr> <td><b>INSURER B :</b></td> <td></td> </tr> <tr> <td><b>INSURER C :</b></td> <td></td> </tr> <tr> <td><b>INSURER D :</b></td> <td></td> </tr> <tr> <td><b>INSURER E :</b></td> <td></td> </tr> <tr> <td><b>INSURER F :</b></td> <td></td> </tr> </table>	<b>INSURER(S) AFFORDING COVERAGE</b>	<b>NAIC #</b>	<b>INSURER A : Evanston Insurance Company</b>	<b>35378</b>	<b>INSURER B :</b>		<b>INSURER C :</b>		<b>INSURER D :</b>		<b>INSURER E :</b>		<b>INSURER F :</b>	
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<b>INSURER F :</b>															

**COVERAGES** **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER: _____						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ _____ \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ _____ \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED _____ RETENTION \$ _____						EACH OCCURRENCE \$ AGGREGATE \$ _____ \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y <input checked="" type="checkbox"/> N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N/A				PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
<b>A</b>	<b>Prof. Liability</b>			<b>MKL7PL0005608</b>	<b>12/15/2022</b>	<b>12/15/2023</b>	<b>Each Claim/Aggregate \$10,000,000</b>

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**  
 This is a Claims Made Policy.

**CERTIFICATE HOLDER** **CANCELLATION**

<b>Greater Orlando Aviation Authority</b> 8652 Casa Verde Road, Building 811 Orlando, FL 32827	<p>SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.</p> <p>AUTHORIZED REPRESENTATIVE <i>Frank T. Podilly</i></p>
--	--



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
1/19/2023

**THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.**

**IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).**

<b>PRODUCER</b> Crystal IBC, LLC 560 Mission St., 6th Floor San Francisco, CA 94105	<b>CONTACT NAME:</b> Heather Shoemaker Williams <b>PHONE (A/C, No. Ext):</b> _____ <b>FAX (A/C, No):</b> _____ <b>E-MAIL ADDRESS:</b> AlliantCorporateCerts@alliant.com														
License#: 0C36861 ALLIHL-01	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center;">INSURER(S) AFFORDING COVERAGE</th> <th style="text-align: center;">NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A : Federal Insurance Company</td> <td style="text-align: center;">20281</td> </tr> <tr> <td>INSURER B : ACE American Insurance Company</td> <td style="text-align: center;">22667</td> </tr> <tr> <td>INSURER C :</td> <td></td> </tr> <tr> <td>INSURER D :</td> <td></td> </tr> <tr> <td>INSURER E :</td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> </tr> </tbody> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A : Federal Insurance Company	20281	INSURER B : ACE American Insurance Company	22667	INSURER C :		INSURER D :		INSURER E :		INSURER F :	
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INSURER E :															
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**COVERAGES** **CERTIFICATE NUMBER: 132584358** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER: _____	Y		3605-39-43 NBO	3/1/2022	3/1/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 Deductible \$ 0
A	<input checked="" type="checkbox"/> <b>AUTOMOBILE LIABILITY</b> <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	Y		(22) 7362-65-36	3/1/2022	3/1/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<input type="checkbox"/> <b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <input type="checkbox"/> <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED _____ RETENTION \$ _____						EACH OCCURRENCE \$ AGGREGATE \$ \$
B	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y <input checked="" type="checkbox"/> N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	(23) 7175-67-12	3/1/2022	3/1/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**  
 Workers Compensation & Employers Liability Coverage consisting of the following programs:  
 7183-29-59 (WC- NY OR WI), ACE Fire Underwriters Insurance Company (NAIC#20702), 3/1/2022-3/1/2023  
 (23) 7175-67-12 (WC- All Other States, except monopolistic states of OH, WA, WY, ND - Stop Gap/Employers Liability coverage only.)  
 Greater Orlando Aviation Authority, the City, their members, officers, employees and agents are included as Additional Insureds as respects General Liability and Automobile as required by written contract, per attached carrier endorsements.

<b>CERTIFICATE HOLDER</b>  Greater Orlando Aviation Authority 8652 Casa Verde Road, Building 811 Orlando FL 32827	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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POLICY NUMBER: (22) 7362-65-36

COMMERCIAL AUTO  
CA 20 48 10 13

**THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.**

## **DESIGNATED INSURED FOR COVERED AUTOS LIABILITY COVERAGE**

This endorsement modifies insurance provided under the following:

AUTO DEALERS COVERAGE FORM  
BUSINESS AUTO COVERAGE FORM  
MOTOR CARRIER COVERAGE FORM

With respect to coverage provided by this endorsement, the provisions of the Coverage Form apply unless modified by this endorsement.

This endorsement identifies person(s) or organization(s) who are "insureds" for Covered Autos Liability Coverage under the Who Is An Insured provision of the Coverage Form. This endorsement does not alter coverage provided in the Coverage Form.

This endorsement changes the policy effective on the inception date of the policy unless another date is indicated below.

**Named Insured:** Alliant Holdings, L.P.  
**Endorsement Effective Date:** 03/01/2022

### **SCHEDULE**

**Name Of Person(s) Or Organization(s):**  
PERSONS OR ORGANIZATIONS THAT YOU ARE OBLIGATED, PURSUANT TO A CONTRACT OR AGREEMENT, TO PROVIDE WITH SUCH INSURANCE AS IS AFFORDED BY THIS POLICY.

Information required to complete this Schedule, if not shown above, will be shown in the Declarations.

Each person or organization shown in the Schedule is an "insured" for Covered Autos Liability Coverage, but only to the extent that person or organization qualifies as an "insured" under the Who Is An Insured provision contained in Paragraph **A.1.** of Section **II** – Covered Autos Liability Coverage in the Business Auto and Motor Carrier Coverage Forms and Paragraph **D.2.** of Section **I** – Covered Autos Coverages of the Auto Dealers Coverage Form.



## Liability Insurance

### Endorsement

*Policy Period* MARCH 01, 2022 TO MARCH 01, 2023  
*Effective Date* MARCH 01, 2022  
*Policy Number* 3605-39-43 NBO  
*Insured* Alliant Holdings, L.P.  
  
*Name of Company* FEDERAL INSURANCE COMPANY  
*Date Issued* MARCH 01, 2022

This Endorsement applies to the following forms:

GENERAL LIABILITY

Under Who Is An Insured, the following provision is added.

### Who Is An Insured

*Owners, Lessees Or Contractors - Ongoing Operations*

- A. Persons or organizations shown in the Schedule below are insureds; but they are insureds only with respect to their liability for **bodily injury, property damage, advertising injury or personal injury** caused, in whole or in part, by:
1. your acts or omissions; or
  2. the acts or omissions of those acting on your behalf;

in the performance of your ongoing operations for the person or organization shown in the Schedule at the applicable location described in the Schedule.

However,

- the insurance afforded to such person or organization only applies to the extent permitted by law; and
- if coverage provided to the person or organization is required by a contract or agreement, the insurance afforded to the person or organization will not be broader than that which you are required by such contract or agreement to provide for the person or organization.



---

**Liability Endorsement**  
(continued)

- B. However, no person or organization is an insured for bodily injury or property damage occurring after:
1. all work, including materials, parts or equipment furnished in connection with such work, on the project (other than service, maintenance or repairs) to be performed by or on behalf of the person or organization shown in the Schedule at the applicable location described in the Schedule has been completed; or
  2. that portion of your work out of which the injury or damage arises has been put to its intended use by any person or organization other than another contractor or subcontractor engaged in performing operations for a principal as part of the same project.

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**Schedule**

Designated Owner, Lessee Or Contractor

PERSONS OR ORGANIZATIONS THAT YOU ARE OBLIGATED, PURSUANT TO A CONTRACT OR AGREEMENT, TO PROVIDE WITH SUCH INSURANCE AS IS AFFORDED BY THIS POLICY.

All other terms and conditions remain unchanged.

Authorized Representative



**CHUBB**

**Liability Insurance**

**Endorsement**

*Policy Period* MARCH 01, 2022 TO MARCH 01, 2023  
*Effective Date* MARCH 01, 2022  
*Policy Number* 3605-39-43 NBO  
*Insured* Alliant Holdings, L.P.  
  
*Name of Company* FEDERAL INSURANCE COMPANY  
  
*Date Issued* MARCH 01, 2022

This Endorsement applies to the following forms:

GENERAL LIABILITY  
EMPLOYEE BENEFITS ERRORS OR OMISSIONS

**Conditions**

Under Conditions, the following provision is added to the condition titled Other Insurance.

*Other Insurance -  
Primary, Noncontributory  
Insurance - Scheduled  
Person Or Organization*

If you are obligated, pursuant to a written contract or agreement, to provide the person or organization described in the Schedule (that is also included in the Who Is An Insured section of this contract) with primary insurance such as is afforded by this policy, then this insurance is primary and we will not seek contribution from insurance available to such person or organization.

**Schedule**

PERSONS OR ORGANIZATIONS THAT YOU ARE OBLIGATED PURSUANT TO A CONTRACT OR AGREEMENT, TO PROVIDE WITH SUCH INSURANCE AS IS AFFORDED BY THIS POLICY.

All other terms and conditions remain unchanged.

Authorized Representative



Alliant Insurance Services



## **REQUEST FOR PROPOSAL (RFP) PROFESSIONAL SERVICES**

### **23-115-RFP BENEFITS CONSULTANT SERVICES**

Benefit Consult Services will assist the Aviation Authority in all matters relating to the design, implementation and management of the Aviation Authority's benefit plans.



# **GREATER ORLANDO AVIATION AUTHORITY**

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October 18th, 2022

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## Tab 2 – Executive Summary

---

### A. General Company Information

- 1) Provide the name of Proposer's company (including the name of any parent company), Include:

Alliant Orlando  
Alliant Insurances Services, Inc.  
271 N. Pennsylvania Ave. Suite 5  
Winter Park, FL 32789

Home Office  
Alliant Insurances Services, Inc.  
701 B Street 6<sup>th</sup> Floor  
San Diego, CA 92101

Northeast Region Office Location  
Alliant Insurance Services  
101 Park Avenue 12<sup>th</sup> Floor  
New York, NY 10016

**Alliant Employee Benefits (Alliant EB)** is one of the four major business groups that comprise Alliant Insurance Services. It provides a full range of brokerage/consulting services, nationally and globally, both to exclusive benefits clients and to joint accounts within Alliant's commercial divisions.

- 2) Contact name and complete contact information of individual responsible for account ("Lead Individual").

Charles Cook, EVP, Producer  
Alliant Insurances Services  
271 N. Pennsylvania Ave. Suite 5  
Winter Park, FL 32789

- 3) Type of organization (corporation, sole proprietor, partnership, other).

Alliant is a privately held corporation that is over 53 percent employee owned. The company conducts business in all 50 states and U.S. territories as well as internationally. We are continually expanding our footprint and service capabilities through a combination of organic growth and the friendly acquisition of successful firms that align with Alliant's client-centric values and culture.

## B. Cover Letter

The cover letter on company letterhead shall be signed by an authorized representative of the Proposer. The letter should indicate the Proposer's commitment to provide the services proposed and include the following:

1. Proposer must certify in writing with its Proposal that Proposer is registered/qualified to do business in the State of Florida. Include a copy of such registration/qualification to the Aviation Authority with the Proposal submission.

Alliant Insurance Services, Inc. is registered to do business in the State of Florida and is including a copy of such registration as [Exhibit A](#).

2. Proposer shall have a minimum of five (5) years of continuous and recent experience providing services of the type described in the Scope of Services above, prior to the deadline of this RFP. Cover letter shall include an affirmative statement and documentary proof of such experience with the Proposal submission.

The Consultants and team herein replying to the Request for Proposal for GOAA Employee Benefits Consulting have over 100 years of combined experience in Consulting/Employee Benefits and are the team who is currently servicing the GOAA account. For more specifics, please read bios and see resumes, which are included with this response as [Exhibit B](#).

3. An affirmative statement that it is independent of the Aviation Authority.

Alliant Insurance Services, Inc. is an independent agency, separate of the Aviation Authority.

4. Proposer shall provide affirmative statement of their willingness to execute an agreement substantially in the form attached as [Exhibit 2](#).

Charles Cook and team at Alliant Insurance Services, Inc. are willing to execute the agreement in the form attached as [Exhibit 2](#), located within this response.

5. If the Proposer is a joint venture or partnership, the Experience and Qualifications may be satisfied by the Joint Venture or Partnership entity. Please state whether the entity is currently in existence, is being formed specifically for this project, or whether it will be formed upon award. If the Joint Venture is formed specifically for this agreement/project or will be formed upon award, please provide a copy of the Joint Venture or Partnership Agreement with the RFP.

Alliant Insurance Services, Inc. is not a joint venture, or a partnership.

GOAA  
23-115 Benefit Consultant  
Services



October 18, 2022

Greater Orlando Aviation Authority  
8652 Casa Verde Road, Bldg 811 Orlando, FL 32837-4338

Re: Purchasing Proposal 23-115 Benefit Consultant Services, for the Orlando International Airport

Alliant, the 8<sup>th</sup> largest consultant in the United States, has extensive experience with public sector clients. Our clients include GOAA, the Seminole County Board of County Commissioners, and the Seminole County Sheriff's Office. Charles served as the consultant for OUC from 1995 until he joined Alliant.

Alliant is at the forefront of Social Determinants of Health (SDOH). SDOH are the conditions in which we are born, grow, live, work and age that influence our physical health and well-being.

Alliant will provide unparalleled expertise, a long-term partnership and a customer service experience expected from one of the country's top service organizations. We have partnered with American Graphix Solutions to strengthen our proposal.

Alliant Insurance Services is committed to providing the services proposed herein and certifies to GOAA that Alliant is registered and qualified to do business in the State of Florida. A copy of our registration is included in our response as Exhibit A. Our team has over 100 years of combined experience. The Lead Consultant, Charles Cook, has over 33 years in the industry. We have included resumes for all team members as Exhibit B.

Alliant Insurance Services, Inc. is an independent agency, separate from GOAA. Alliant Insurance Services, Inc. is willing to execute the agreement in the form attached as Exhibit 2, located within this response. Alliant Insurance Services, Inc. is not a joint venture, nor a partnership.

Our goal is to earn your business and continue to serve you well into the future.

Sincerely,

A handwritten signature in black ink, appearing to read "Charles P. Cook", written over a light blue circular stamp.

Charles P. Cook – Executive Vice President, Alliant Insurance Services, Inc.

## Tab 3 – Proposer’s Knowledge and Experience

---

### A. Proposer's knowledge and experience, including:

#### 1. Proposer shall include a narrative of the experience and qualifications of the Proposer relative to benefit consulting services.

Charles Cook has over 33 years of experience working with both public and private sector clients. Charles’ primary area of focus has been on financial analysis, negotiation, strategic planning, pharmacy, wellness, benchmarking and compliance – for both fully insured and self-funded groups. He has worked with several public sector groups throughout his career that has given him a depth of tenure and experience in the public sector unmatched in Florida. Charles has managed all lines of coverage for his clients’ active employees, pre-65 retirees and Medicare retirees. He has worked in conjunction with his clients on budgeting, projections and strategic planning. He has a blend of private and public sector clients which gives him a unique perspective and insight unlike most consultants. His experience specific to this RFP that relates to governmental entities with multiple divisions and retirees is unique.

#### 2. Provide documentation on other projects, a minimum of three (3), up to a maximum of five (5), which best represent the Proposer’s skill and experience in providing the Services of similar type and complexity as the services required herein. Include brief descriptions that demonstrate the Proposer's experience relative to the Scope of Services listed in Section 2.0.

##### Project #1: Funding Review

A long-term client was fully insured but wanted us to evaluate self-funded options. We engaged our team and financial underwriting experts to do a 7-year retrospective view of fully-insured vs self-funded costs. We summarized all of the data for both funding methods to provide an executive presentation to leadership on our findings. We also did a projection for both funding types to determine which method would be most advantageous to the group at renewal. Part of this evaluation used a financial analytics tool to predict which option would be best. During this process we also evaluated their on-going claims and proposed a wellness program focused on preventative medicine to improve the overall health of the population.

##### Project #2 Voluntary Benefits

A client wanted to expand their voluntary (worksite) benefits. We conducted a full market analysis with our Voluntary Benefits Specialist division. We gathered more than 15 different types of policies from several carriers and provided benchmark information to determine which products might be the best fit based on their industry and popularity. These policies are often very hard to differentiate based on the many benefits each policy offers. Alliant created a matrix that rates each policy based on benefits and price to determine the carrier that would be the best option.

##### Project #3: Medicare Renewal



While the team has worked with OPEB for pre and post 65 retirees, one of the most unique analysis occurred during health care reform. Exchange models were created for Medicare Age retirees mirroring the exchanges for the public. The theory was that this would open options to employers and their retirees. After a thorough analysis, it was evident that while the model had application, it was initially cumbersome in the combination of medical and pharmacy benefits and could not easily fill the “donut-hole” as it was known at the time. It was not a viable alternative to benefits provided through an employer’s regular plan or in lieu of Medicare options then available to groups. The hope had also been that exchanges would develop for non-Medicare age retirees with guarantee issue. However, these never evolved and complexity/pitfalls.

#### Project #4 On-site Clinic Analysis

Charles Cook has conducted two RFP’s and analyses for onsite clinics over a period of several years. This was for a group with approximately 800 employees in the Orlando area and 600 employees spread throughout the southeast. We conducted ongoing financial analysis about the impact of an onsite clinic depending on what services would be provided. Finalists were interviewed after each RFP process. Interestingly, the abilities of different vendors evolved exponentially in a few short years. This primarily had to do with the state-by-state authorization of tele/video medicine. At the time, the client did not believe that it made financial sense given the out-of-state population as well as the potential lack of uptake by dependents. Covid-19 exponentially increased the availability of and acceptance of virtual medicine. Both this client and GOAA have the potential space for a clinic onsite as well as the possibility of bringing in other employers/constituents.

#### Project #5 Wellness

A new client needed assistance in understanding why employee participation in company-sponsored wellness programs was so low, despite the client investing a myriad of resources as well as time and commitment.

Alliant conducted a comprehensive survey and coupled the results with health risk assessment and biometric data. Through a forensic review of the information, we uncovered that a good amount of employees didn’t get their annually physical, age related exams and a good amount of claims were associated with chronic conditions. Alliant made recommendations to:

- Incentivize the employees to get their annual physical and age-appropriate exams
- Establish a relationship with a Primary Care Physician
- Incentivize employees to participate in disease management programs
- Enhance the Employee Assistance Program (EAP) to cover more face-to-face visits.

Additionally, Alliant recommended expanding the scope of the current wellness strategy to directly support financial health and security. Among the services to be included: student loan refinancing, debt consolidation services, and preferred banking relationships. Other services such as seminars on understanding credit

scores and impulsive stress shopping were introduced to help employees address behaviors that contributed to financial stress and related health issues.

## B. Key Personnel

1. The Proposer shall identify the Lead Individual to be assigned to the Aviation Authority's account who has at least five (5) years of successful experience, describe the experience, which is with similar scope to that of the Orlando International Airport.

Charles Cook, Executive Vice President, will be the lead individual for the Orlando International Airport. Charles has an undergraduate degree in Rehabilitation Counseling and a master's in Public Administration from the Florida State University. After working in training and development at the state headquarters for the Department of Health and Rehabilitative Services, he worked on a successful statewide campaign as well as the successful campaign for the first Cuban-American elected to Congress.

Upon entering the insurance industry on October 16, 1989, he received extensive training with a top company in the industry that included underwriting and strategic funding alternatives. His clients have included both public and private sector entities with a focus on large, complex organization with multiple classes of covered individuals.

During his career, he has worked with complex organizations both public and private including the Orlando Utilities Commission, Seminole County Government, the Nebraska Public Power Department, Seminole County Sheriffs, Ripley Entertainment, Planet Hollywood and Massey Services. Each client has had its unique challenges and structure. Charles's unique experience across all types of funding, organizational structures and employee/retiree combinations places him in the perfect position to serve as lead consultant for the Greater Orlando Aviation Authority.

Andrew Fox, Vice President, has over 12 years of experience as an Employee Benefits Consultant. Andrew will be the partner consultant working with the Orlando International Airport. He works in Alliant's Orlando office and has experience working with organizations in the public and private sectors, including fully-insured and self-insured benefit programs. He proactively manages all aspects of benefit programs, including the design and development of integrated wellness programs. Andrew concentrates on solutions that reduce healthcare spend and produce quantifiable bottom-line results. His expertise includes pharmacy, reinsurance, wellbeing, voluntary benefits, analytics, and a range of additional benefits solutions. Andrew is a life-long Orlando resident and graduated from Florida State University with a degree in Finance.

Leah Wroblewski, Consultant/Account Executive will provide strategic planning, monitor program progress and actively responds to client feedback. Leah will direct program transition management, oversee and manage program implementation, benchmarking, and ongoing quality assurance. Leads/participates in scheduled and as needed client

meetings. She will also coordinate the account team's subject matter experts and other resources on behalf of GOAA. Leah brings 30 years of experience in the employee benefits industry. Leah's professional background includes working for a national insurance company, for a national agency and as an agency owner. Her well-rounded experience gives a 360° perspective and approach to engineering solutions and strategies for employers. Leah has provided consulting to employers in varying industries and size, from small business to national account Fortune 500 ranked companies. Leah is based out of Alliant's Winter Park, Florida office. Leah graduated from the University of Central Florida with a Bachelor of Science in Business Administration degree, majoring in Marketing.

Amy Kimberlin, Financial Analytics/Benefits Analyst, will manage the underwriting, financial, and analytics functions for GOAA. Amy has over 20 years of experience in the Employee Benefits field and has worked with GOAA since they came on board with prior employer. She will assist the team with financial projections, renewal shopping and presenting calculations, claims reporting, utilization, contribution modeling, benchmarking, and funding models. Responsible for best practices and quality control for client financials. Coordinates data warehousing and health informatics services. Amy has a knack for working with all sorts of individuals and brings a team approach to all areas. Amy was born and raised in Central Florida, graduated from the University of Florida with a degree in Business/Marketing.

Debbie Haas, Account Manager will support the Account Executive in directing daily program operations, including but not limited to coordination and administration of services, vendor liaison activities, open enrollment, and employee communications. Assists with general billing and claims issues. Debbie brings over 25 years of experience in the Employee Benefits field. Starting out on the carrier side with United Healthcare, the Hartford, and Reliance Standard Life. At the Hartford, she was a long-term disability Claims Examiner. She was part of the Stable and Mature Unit, working closely with the Special Investigations Unit to prevent fraudulent claims. She moved to the broker side of the business starting as an Assistant Account Manager and focused on claim, eligibility, and billing issues. As an Account Manager, she will utilize her past experiences to support client accounts and relationships. Debbie earned an Associates in Arts Degree in General Studies from Seminole State College.

2. Provide names and titles of key personnel and an organizational chart of your proposed project team. Clearly identify and describe the proposed role for each key personnel. Provide professional resumes of all key personnel.

NAME	TEAM ROLE	RESPONSIBILITIES	Yrs. in industry
<b>Executive Management</b>			

Dan McCaffrey	Executive Sponsor	Represents the Alliant EB practice. Contributes to executive oversight, advanced escalation, and client relations.	25 yrs.
Camille Pucillo	Operations Manager	Directs the development, implementation, and best practice standards for broker/consulting services for Alliant EB's Northeast and Florida regions.	21 yrs.
<b>Core Benefits Consulting &amp; Account Management</b>			
Charles Cook	Benefits Team Leader/Lead Consultant	Establishes overall benefit program goals and financial objectives of the benefits program. Provides oversight of strategic planning and leads all collaborative consulting efforts. Responsible for performance of all personnel and resources assigned to account. Problem escalation and direct contact for GOAA management if needed.	33 yrs.
Andrew Fox	Co-Consultant	Works together with the Lead Consultant on all strategic planning and collaborates with all parties on the ongoing monitoring and management of plans.	12 yrs.
Leah Wrobleski	Account Executive	Provides strategic planning. Monitors program progress and actively responds to client feedback. Directs program transition management, program implementation, reporting, benchmarking, vendor management and negotiations, and ongoing quality assurance. Leads/participates in scheduled and as needed client meetings. Coordinates account team's subject matter experts and other resources. Primary HR/Benefits contact daily.	30 yrs.
Debbie Haas	Account Manager	Supports Account Executive in directing daily program operations, including but not limited to coordination and administration of services, vendor liaison activities, open enrollment, and employee communications.	10 yrs.
Amy Kimberlin	Underwriting/ Financial & Analytics Manager	Manages the underwriting, financial, and analytics functions for your account. Studies cover financial projections, renewal shopping and presenting calculations, claims reporting, utilization, contribution modeling, benchmarking, and funding models.	20 yrs.

		Responsible for best practices and quality control for client financials. Coordinates data warehousing and health informatics services.	
<b>Subject Matter Experts</b>			
Doug Levit	Senior Actuary	Monitors and consults on all actuarial functions performed for your account. Additional responsibilities include IBNR reserve calculations, actuarial certifications, staff training and support, advanced data analytics studies, and special projects.	28 yrs.
Joe Logan	Underwriter	Conducts underwriting analyses and provides client reports. Studies renewal calculations, claims reporting, utilization, contribution modeling, benchmarking, and alternative funding models.	10 yrs.
Joseph Jurewicz	Pharmacy Consultant	Analyzes Rx program structure, pricing levels, member utilization, contract terms, and alternative management options to reduce the pharmacy costs of self-funded plans.	15 yrs.
Kryz Novotnaj	National Director, Health Informatics	Leads key initiatives based on analytic reporting and clinical methodology to assist employers with understanding their population's health/illness burden.	20 yrs.
Lydia Ramcharitar	Mergers & Acquisitions Consultant	Manages all M&A due diligence activity for clients as they consider possible acquisitions and the opportunities and liabilities that come with such acquisitions.	20 yrs.
Priya Setty, J.D.	Attorney, Compliance Consultant	Specialist in benefits law. Engaged to review and interpret compliance requirements, provide in-depth commentary on specific issues, and respond to escalated client questions.	13 yrs.
Margaret Gee	Lead Communications Consultant	Assists account management with effective planning and use of Alliant EB communications resources for employee awareness and education regarding benefits. Areas of focus include Open Enrollment, new product rollouts, and benefits utilization.	25 yrs.

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Jennifer Spence	National Director, Health & Productivity	Provides direction and support in evaluating, implementing, and managing clinical programs, consumerism strategies, and prevention initiatives.	21 yrs.
Scott Martinelli	Voluntary Benefits Consultant	Assists in development and implementation of customized, effective, and affordable well-being programs. Addresses such areas as program planning, best practices, communications, vendor selection, and the ongoing tracking of results.	14 yrs.
Holly Moyer	Absence Management Consultant	Provides guidance and support in the areas of pricing, vendor management, technology tools, and best practices program design, administration, and compliance.	18 yrs.
<b>EMPLOYEE CALL CENTER</b>			
Benefit Advocates	Alliant-staffed call center available 12 months a year to answer benefit questions and help resolve claims and service issues.		

BENEFITS TECHNOLOGY SERVICES	
Employer Technology Consulting	Internal department that reviews and makes recommendations regarding client's in-force systems, and assists in specifying, marketing, and implementing new systems or upgrades.
PROFESSIONAL HR SUPPORT	
Mineral (formerly ThinkHR)	Alliant vendor partner provides your HR staff with live help and online tools, including on-demand Q&A assistance, benefits compliance support, standard documents and forms, best practice information, and HR training courses.

### Your Alliant Team

Alliant has decades of experience creating the “right” account teams for literally thousands of clients.

- **Core Account Management:** This group includes your Benefits Team Leader/Lead Consultant, Technical Consultant/Underwriting and Financial Manager, and Account Executives. They direct all strategic, management, and financial functions for your account. They also serve as the points-of-contact for the GOAA’ executive management as well as for your HR department, both on a day-to-day and as-needed basis.
- **Subject Matter Experts:** Supported by their National Practice management and resources, the SMEs assigned to your team represent all the specialized disciplines needed to help implement high quality, cost-effective benefit programs. Through Alliant 's "**Matrix Management**" model, every SME reports to more than one supervisor or team leader on a case-by-case basis. They are not tied to a specific territory or line of business. As a result, Alliant EB can leverage our intellectual capital to assist each client individually—but without having to impose time limits, territorial restrictions, or chargeback costs.
- **Specialized Support Groups:** We include such resources as an Employee Benefits Help Desk (to answer employee questions and assist with their claim issues) and an HR support service (which provides on-call professional consulting as well as model documents and training videos).
- **Executive Sponsor:** Representing Alliant’s national benefits practice, this senior executive provides oversight, issue escalation, and additional firm resources if needed.

Your account team members average 25+ years of industry experience. As important, all these outstanding professionals are assigned to the GOAA for the foreseeable future. At no point in the engagement will they be replaced by more junior personnel to reduce internal costs.



The members of our team have worked with and for other consulting firms. They can attest that our service model is a differentiator. We staff client teams thoughtfully with talented, experienced experts who are actively involved every day in our work for you. Those teams include strategic leaders, analysts, and underwriters, as well as account management experts who serve as a resource to and an extension of your benefits staff. Your core Alliant team is supported by specialty resources, including health and productivity, compliance, data analytics, prescription benefits, and stop-loss procurement.

### 3. Describe the key personnel experience with similar scope to that of the Orlando International Airport.

The key personnel with similar scope and/or exact experience on the local team include:

Charles Cook, Executive Vice President, Consultant (lead)  
*Public Sector account experience with actives, retirees, firefighters and first responders continuously since 1995 - GOAA since 2010*

Andrew Fox, Vice President, Consultant  
*Public Sector account experience with actives, retirees, firefighters and first responders continuously since 2017 - GOAA since spring 2022*

Leah Wrobleski, Account Executive  
*Public Sector experience as a carrier representative – 8 years including actives and retirees*

Debbie Haas, Account Manager  
*Public Sector experience as a carrier representative*

Amy Kimberlin, Benefits Analyst  
*Public Sector account experience with actives, retirees, firefighters and first responders continuously since 2003 - GOAA since 2010*

All team members presented within this response of RFP have extensive experience in the employee benefits arena. Our proposed team is unique in the way they have provided services working together as a team for several years.

- Charles Cook – 30+ years in Employee Benefits field
- Andrew Fox – 12+ years in Employee Benefits field
- Leah Wrobleski – 30+ years in the Employee Benefits arena in different roles
- Debbie Haas – 25+ years in Employee Benefits field
- Amy Kimberlin – 20+ years in Employee Benefits field



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The culture of this team together with Alliant Insurance Services, Inc. brings an extremely high level of commitment to clients. This team has had a retention rate in excess 95% during its entire tenure under the leadership of Charles Cook while consistently adding new clients.

### C. References

The Proposers' references should demonstrate that it has the experience required, and reasonably has the reputation to perform the Scope of Services described. It is the responsibility of the Proposer to provide references and information that most closely demonstrate experience with airport or governmental accounts of similar size, complexity, and risk exposure as the Aviation Authority. References shall be for work **substantially similar in scope and magnitude** and shall be able to validate the Proposer's capabilities and experience.

1. The Proposer shall provide a minimum of three (3), up to a maximum of five (5) references for which your proposed Lead Individual and key personnel have performed these services.
2. Proposer shall provide the following information for each reference:

#### REFERENCE #1

- a) **Name** Greater Orlando Aviation Authority
- b) **Address** 5855 Cargo Road, Orlando, FL 32827-4399
- c) **Contact person** Kathy Bond, Senior Director of Human Resources & Risk Management
- d) **Telephone number and email address of contact person**  
[kbond@goaa.org](mailto:kbond@goaa.org); (407) 825-2328
- e) **Brief Description of Overview of Work Performed**  
Provided comprehensive consulting services including benchmarking, strategic planning, RFP development, financial analysis, claims analysis, monthly IBNR and projections, benefits strategy, contribution strategy, compliance support, open enrollment, benefits administration interface support, management data analytics platform.

- 1) **Proposer's Role and Lead Individual and summary of work performed by Proposer. Indicate which team member(s) provided services.**  
Charles Cook, Executive Vice President, Consultant (lead)  
Andrew Fox, Vice President, Consultant  
Leah Wroblewski, Account Executive  
Debbie Haas, Account Manager  
Amy Kimberlin, Benefits Analyst
- 2) **Provide the name of the firm member working with your firm that was the primary contact for the reference provided.**  
Charles Cook, Executive Vice President, Consultant (lead)
- 3) **Date of Services/Status (current or past client).**  
2010 - present

- 4) The Proposer authorizes the Aviation Authority, its staff or consultants to contact any of the references provided in the response and specifically authorizes such references to release either orally or in writing, any appropriate data with respect to the Proposer and its Engagement Team members.

We authorize the Authority to contact any of the references provided.

## REFERENCE #2

- a) **Name** Seminole County Sheriff's Office  
b) **Address** 100 Eslinger Way, Sanford, FL 32773  
c) **Contact person** Mary Hope, Director of Fiscal Services  
d) **Telephone number and email address of contact person**  
[mhope@seminolesheriff.org](mailto:mhope@seminolesheriff.org); (407) 665-6532  
e) **Brief Description of Overview of Work Performed**  
Provided comprehensive consulting services including benchmarking, strategic planning, RFP development, financial analysis, claims analysis, monthly IBNR and projections, benefits strategy, contribution strategy, compliance support, open enrollment, benefits administration interface support, management data analytics platform, manage opioid prevention program

- 1) **Proposer's Role and Lead Individual and summary of work performed by Proposer. Indicate which team member(s) provided services.**  
Charles Cook, Executive Vice President, Consultant (lead)  
Andrew Fox, Vice President, Consultant  
Whitney Suplick, Account Executive  
Debbie Haas, Account Manager  
Amy Kimberlin, Benefits Analyst
- 2) **Provide the name of the firm member working with your firm that was the primary contact for the reference provided.**  
Charles Cook, Executive Vice President, Consultant (lead)
- 3) **Date of Services/Status (current or past client).**  
February 2022 – present
- 4) The Proposer authorizes the Aviation Authority, its staff or consultants to contact any of the references provided in the response and specifically authorizes such references to release either orally or in writing, any appropriate data with respect to the Proposer and its Engagement Team members.  
We authorize the Authority to contact any of the references provided.

## REFERENCE #3

- a) **Name** Seminole County Government
- b) **Address** 1101 East First Street, Sanford, FL 32771
- c) **Contact person** Christina Brandolini, Chief Administrator of the Office of HR
- d) **Telephone number and email address of contact person**  
[cbrandolini@seminolecountyfl.gov](mailto:cbrandolini@seminolecountyfl.gov); (407) 665-7940
- e) **Brief Description of Overview of Work Performed**  
Provide comprehensive consulting services including benchmarking, strategic planning, RFP development, financial analysis, claims analysis, monthly IBNR and projections, benefits strategy, contribution strategy, compliance support, open enrollment, benefits administration interface support, third-party pharmacy savings program integration and human resource support.

- 1) **Proposer's Role and Lead Individual and summary of work performed by Proposer. Indicate which team member(s) provided services.**  
Charles Cook, Executive Vice President, Consultant (lead)  
Andrew Fox, Vice President, Consultant  
Whitney Suplick, Account Executive  
Debbie Haas, Account Manager  
Amy Kimberlin, Benefits Analyst
- 2) **Provide the name of the firm member working with your firm that was the primary contact for the reference provided.**  
Charles Cook, Executive Vice President, Consultant (lead)
- 3) **Date of Services/Status (current or past client).**  
February 2021 to present with brief interruption of consulting arrangement upon moving from McGriff Insurance Services to Alliant Insurance Services.
- 4) **The Proposer authorizes the Aviation Authority, its staff or consultants to contact any of the references provided in the response and specifically authorizes such references to release either orally or in writing, any appropriate data with respect to the Proposer and its Engagement Team members.**  
We authorize the Authority to contact any of the references provided.

#### REFERENCE #4

- a) **Name** Orlando Utilities Commission
- b) **Address** 100 West Anderson St. Orlando, FL 32801
- c) **Contact person** Latisha Thompson, Chief Employee Experience Officer
- d) **Telephone number and email address of contact person**  
[lthompson@ouc.com](mailto:lthompson@ouc.com); 407-242-7106
- e) **Brief Description of Overview of Work Performed**

Provide comprehensive consulting services including benchmarking, strategic planning, RFP development, financial analysis, claims analysis, monthly IBNR and projections, benefits strategy, contribution strategy, compliance support, open enrollment, benefits administration interface support, third-party pharmacy savings program integration and human resource support.

Uniquely, OUC was in the first category of clients required to complete new HIPAA filings for self-funded plans at a certain size. The team worked with OUC and their legal counsel to develop prototype documents before guidance was issued by regulatory agencies. Upon receipt of guidance, drafts were adjusted such that all requirements were met in a timely fashion.

Additionally, OUC was one of the first clients to be eligible for the Medicare Part D Subsidy. Again, the final forms had not been issued by regulatory agencies – only drafts. The team worked with OUC to prepare all documentation to submit for the subsidy. There was a finite amount of money and order of submission was critical. The team worked to complete final forms and prepared the FedEx envelop to submit.

Over the course of time working with this client, many similar projects were undertaken and completed successfully including three in-depth claim audits.

1) **Proposer's Role and Lead Individual and summary of work performed by Proposer. Indicate which team member(s) provided services.**

Charles Cook, Executive Vice President, Consultant (lead)  
Whitney Suplick, Account Executive  
Amy Kimberlin, Benefits Analyst

2) **Provide the name of the firm member working with your firm that was the primary contact for the reference provided.**

Charles Cook

3) **Date of Services/Status (current or past client).**

May 1995 – June 2022

4) **The Proposer authorizes the Aviation Authority, its staff or consultants to contact any of the references provided in the response and specifically authorizes such references to release either orally or in writing, any appropriate data with respect to the Proposer and its Engagement Team members.**

We authorize the Authority to contact any of the references provided.

## REFERENCE #5

a) **Name**      Brevard Health Alliance

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- b) **Address** 4315 Woodland Park Drive, Melbourne, FL 32904
  - c) **Contact person** Bob Walters, Chief HR Officer
  - d) **Telephone number and email address of contact person**  
bob.walters@brevardhealth.org; (321) 241-6865
  - e) **Brief Description of Overview of Work Performed**  
Provided comprehensive consulting services including benchmarking, strategic planning, RFP development, financial analysis, claims analysis, projections, benefits strategy, contribution strategy, compliance support, open enrollment, benefits administration interface support, and human resource support.
- 1) **Proposer's Role and Lead Individual and summary of work performed by Proposer. Indicate which team member(s) provided services.**  
Andrew Fox, Vice President, Consultant  
Charles Cook, Executive Vice President, Consultant  
Whitney Suplick, Account Executive  
Debbie Haas, Account Manager  
Amy Kimberlin, Benefits Analyst
  - 2) **Provide the name of the firm member working with your firm that was the primary contact for the reference provided.**  
Andrew Fox, Vice President, Consultant
  - 3) **Date of Services/Status (current or past client).**  
December 2013 - present
  - 4) **The Proposer authorizes the Aviation Authority, its staff or consultants to contact any of the references provided in the response and specifically authorizes such references to release either orally or in writing, any appropriate data with respect to the Proposer and its Engagement Team members.**  
We authorize the Authority to contact any of the references provided.

## Tab 4 –Approach and Methodology Plans

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### A. Work Plan

#### 1. Approach to assisting governmental entities in maximizing employee benefits while minimizing the financial impact of rising premiums.

Alliant Employee Benefits is a division of Alliant Insurance Services. We provide state-of-the-art benefits brokerage and consulting services locally, nationally and internationally, both to public and private sector clients. The employee benefits practice of Alliant (per Business Insurance) is also among the nation's 10 largest.

Our approach is “**National in Scope, Local in Service.**” We provide all the resources, expertise and proactive partnership expected of a national consultant with the responsiveness and granular support that our clients would expect from a local broker. We are ideally positioned to serve the Aviation Authority as both a trusted partner and extension of your human resource and finance departments.

Alliant's business philosophy is comprised of four key concepts, which shape our unique culture and success:

- **Entrepreneurialism:** Alliant promotes an entrepreneurial culture, because when quality people have the freedom outside of traditional bureaucracy to explore and innovate, good things happen for our clients. This allows a customized approach for each client. For GOAA, this means being intimately familiar with the needs of the active employees, pre-65 retirees and Medicare retirees within the culture, structure and challenges that are unique to GOAA. It is our responsibility to proactively guide GOAA in the area of benefits and how those benefits integrate with the Authority's entire employee benefits strategy.
- **Service:** Alliant employees understand they are an extension of our clients' business and constantly strive to help them grow, while protecting their business. The core of service to us is “responsiveness.” We have a culture of immediate responsiveness and keeping clients of the status of issues that require time to resolve. But service is best when it follows proactive partnership so that there are no surprises and fewer problems to solve. It could be called “issue prevention.”
- **Relationships:** Alliant knows that quality relationships are cultivated on trust, integrity, and results. These values are at the heart of everything we do.
- **People:** Alliant's distinct culture comes from passionate, quality people who aren't afraid to think differently, take ownership, and deliver exceptional service and value.

#### 2. RFP process for selecting related providers and carriers.

Alliant assumes full responsibility for vendor management.

Our commitment includes:

- Being responsive to client requirements and preferences.
- Conducting the initial marketing process for all vendors: pre-qualification; preparation and distribution of RFPs; evaluation of responses; vendor finalist presentations and Q&A; Alliant's recommendations; vendor negotiations through final contracting, subject to review and approval by GOAA.
- Evaluating each vendor's:
  - Underwriting capabilities and practices
  - Account management team (in terms of experience, depth, availability, etc.)
  - Range and quality of plan member support services
  - Strength of provider networks (size, distribution and access, quality of care ratings)
  - Level of network discounts and guarantees to client
  - Availability, quality, and associated costs for Medical Management, Disease Management, and Health and Wellness programs
  - Recommendations of innovative products and solutions appropriate to the client
  - Willingness to participate in client benefit events (e.g., Open Enrollment and health fairs)
  - IT capabilities, including the ability (and any costs) to integrate with client systems
  - Reporting (range, depth, and frequency)
  - Competitive pricing
- Managing the renewal process and negotiations
- Investigating and resolving all vendor service issues

Alliant documents and tracks vendor adherence to performance guarantees (financial and operational) in our agency management system. This information is culled from such sources as:

- Plan members (either directly through surveys, or indirectly by assessing activity reports from our Benefit Advocate group, which may indicate underlying vendor problems or trends)
- Your HR department
- Alliant account team members who work with vendors on an ongoing basis
- Reviews of vendor billing



### 3. Approach to resolving provider/carrier/customer issues.

If any problems are identified, Alliant will: (1) immediately engage and monitor the issue until it is resolved; and (2) document the quality of the vendor's response if vendor related (e.g., accepting responsibility, timeliness, completeness, addressing root causes, likelihood of recurrence). At renewal, Alliant will include and weigh these factors in our competitive assessment of the vendor's renewal proposal.

Our culture creates and encourages an environment where our team members respond as soon as possible if not immediately to client concerns on any level. We engage partners, providers or carriers and seek immediate resolution in the best interest of the clients. We want our clients to let us know of concerns when they arise and allow our team to use our long-standing relationships and carrier knowledge to seek the best path to a positive resolution.

Today's technology of texting in addition to emails and phone calls helps us keep clients up to date during the stages of issue resolution.

### 4. Methodology and approach to the Scope of Services as listed in Section 2.0

#### Scope of Services

##### a. Provide estimates of renewal rates for benefit plans and services to assist the Authority with forecasting and budgeting.

While GOAA has remained fully insured during this team's tenure as consultant, there have been multiple retrospective reviews done to determine the possibility of self-funding. While there has not been monthly reporting per se, there have been multiple claim summary and projection discussions during the year. GOAA sets its budget during January and February. The first projection for the renewals for all lines of coverage is provided in January, the initial renewal provided in May 2022. Follow-up projections are provided to keep HR apprised of any potential changes in the direction.

There have been multiple utilization reviews and specific claim analyses done upon request. As The Authority moves forward with its decision to convert to self-funding for 1/1/24, the discussions around reporting and projections will increase.

Alliant will provide monthly forecasting of expected costs and for the renewal year. This will give us insight into the rate action and rates for the following year. These models will be provided whether GOAA remains fully insured or self-funded. If GOAA changes to a self-funded program, Alliant will be responsible for developing the conventional equivalent rates for these programs. Alliant develops these according to guidelines and regulations and does not rely on carrier rates. Also during 2023, Alliant will provide monthly Incurred But Not Reported (IBNR) reports to demonstrate the type of reporting that will be provided in addition to projections.

b. Assist in the competitive proposal process for the Aviation Authority's benefit plans and related Third Party Administrator (TPA) providers, including proposal development, evaluation, and recommendation.

Alliant will pursue all vendor combinations and permutations that could potentially provide a path to long-term success with all of the benefit programs. A great deal, but not all of a program's success has to do with cost. We work to bring together partners that create a program to achieve maximum cost-savings while providing an experience that will lead to employee engagement in their health and wellness – where pathways to care are easy to navigate.

c. Solicit and negotiate premiums, renewal rates, service, benefit levels, plan design, special terms and conditions, etc. with carriers and providers for benefit plans in coordination with the Human Resources (HR) Staff. Initiate all contract renewals.

Alliant will take full responsibility and leadership in soliciting all proposals and negotiating all aspects in the best interest of GOAA. We want to give proactive guidance and advice that will enable HR and Finance to make the best decision possible without having to be intimately involved in the research and minute details of all aspects of the proposals. It is our job to make sure that every aspect of every program is in the best interest of GOAA.

In addition to our unparalleled expertise, an integral part of our success is a result of the depth of trust with our carrier partnerships.

Alliant has unsurpassed marketplace leverage and negotiating ability based on the following factors, both individually and in combination:

- The Alliant organization places over \$27.5 billion in annual premiums. This volume of activity alone gives us significant market knowledge, presence, and negotiating strength.
- Alliant sits on the Broker Advisory Boards of almost all major carriers.
- Our national footprint, combined with the size of our client base, gives us extensive knowledge of regional and local carriers/insurers--knowledge that we utilize in the negotiating process.
- Your tenured account team personnel have successfully negotiated thousands of contracts over the course of their 25+ year careers.
- Our senior management and account resources have also established high-level contacts and personal relationships within all major carriers, developed over decades of experience. In many cases we have direct access to the vendors' senior management, home-office decision makers, and underwriters—the people who have first-hand knowledge and/or authority regarding programs, policies, and pricing.

d. Apprise the Aviation Authority of local and national benefit trends, innovative ideas and recommend new products, designs, programs, and services. Present benchmarks, industry standards, and best practices.

Alliant will apprise the Aviation Authority of local and national trends as well as provide education on the evolving health care market. This will be broad in making sure GOAA understands any and all potential solutions/enhancement/strategies even if those strategies have not yet been adopted on a large scale.

Alliant provides national, regional, state and industry-specific benchmark and best proactive information through multiple sources including out national book of business.

Plan design is arguably the primary one of the most employee-facing components of a benefits program. Our goal is to strike a balance between what gives GOAA the best financial results as a business, what gives Human Resources the strongest recruitment and retention tool, and what gives your employees an acceptable level of protection and peace-of-mind for themselves and their covered dependents.

We start the process by applying these criteria:

- Understand your current plan designs and how they have developed over time.
- Become completely familiar with your goals, objectives, business culture, and employee population.
- Use benchmarking to see how your benefit levels and contributions compare (e.g., too rich? not rich enough?) to your industry, locations, and competition for the same labor pool.
- Identify specific plan design features to support behaviors that improve member health and reduce the frequency of claims (e.g., tobacco cessation and weight loss programs covered at 100%).

Based on all available information, we would develop a strategic plan and review with GOAA the direction we believe your plan designs need to take. With client input and approval, we typically proceed to test the carrier/vendor market and report on the marketing results, presenting a line-by-line comparison of plan design features and costs.

At the same time, Alliant does not evaluate plan design features in a vacuum. We consider all other factors that impact cost and performance. For example, we:

- Monitor utilization and claims activity throughout the year, looking to identify trends and recommend corrective actions.
- Integrate reviews of provider networks (for size and access, discount levels, and quality care), contribution scenarios (to promote cost savings but also consistency and fairness), pharmacy strategies, etc.
- Ensure that your plans are in compliance with all federal, state, and local regulations, reducing your financial exposure to potential fines and/or legal actions

Proactively educate employees to better understand their benefits and leverage available plan design options.

- By providing a comprehensive, customized approach, we look to deliver the highest value at the lowest cost.

e. Provide ongoing analysis of plan designs (including retiree coverages), cost containment strategies, available cost sharing alternatives, competitive position, and funding methods, including but not limited to self-funding.

We would provide guidance on the above including funding, cost-sharing, up to date creative alternatives. All would be done with the goals of cost containment and employee satisfaction and ultimately an improvement in employee health.

An option that would involve the employee experience, cost-containment, plan design and an alternative funding mechanism would be the evaluation and possible introduction of an onsite/near-site clinic. In addition to our internal expertise for guiding this process, our goal would be to engage a minority-owned business with specific expertise in this space. They are currently confirming their federal designation and are seeking designations as a minority business as outlined in this RFP.

Alliant Analytics is a proprietary data warehouse solution that aggregates your benefits plan data across multiple vendors. With its broad range of reporting data sets, our solution gives GOAA the essential data needed to inform strategic health decisions and drive significant improvements in annual savings. It can provide detailed claims history and utilization analysis, cost driver analysis, and predictive modeling. Its extensive reporting package addresses all the key elements of plan performance, such as:

- Demographic changes
- Year-over-year utilization changes
- Top drug utilization
- Leading chronic conditions
- Clinical adherence metrics
- Prospective risk assessment

Our solution currently runs over 100 standard reports and provides a series of executive dashboards that summarize key findings for our clients. We also incorporate quality care metrics from a national health data provider. This information allows us to analyze:

- Distribution of client spend by quality of provider
- Cost savings related to improving provider quality
- Regional hospital quality comparisons
- Risk score analysis of higher vs lower-rated quality providers

One key differentiator of Alliant's Data Analytics Platform is our partnership with Johns Hopkins University and the licensing of their Adjusted Clinical Grouping (ACG) Database, which we brand as Plan IQ. Alliant is the only employee benefits broker/consultant in the U.S. with a partnership with Johns Hopkins University (JHU). JHU is an Internationally Recognized Medical Institution and Leader in Medicine, Research and Innovation, powered by ACG® established in the early 1970s. The ACG Database contains over 4.2 Trillion medical claim records analyzed and used by doctors, scientists, nurses and researchers. It evaluates gender/age composition to develop lifestyle risk adjustment factors (LSRAF's) and uses evidence-based medicine to predict the future health care costs associated with large claims and determine a plan's rate appropriateness.

f. [Timely inform the Aviation Authority of changing legislation, regulatory and legal decisions affecting employee benefits. Advise and discuss methods to comply with these changes including any reporting requirements.](#)

Our national Compliance department is tasked with keeping your organization informed and prepared regarding the latest compliance requirements—not only to avoid legal exposures, but to contribute to your future HR and benefits planning. The department is staffed by experienced attorneys and benefits professionals who exclusively review, research, and help problem-solve the employee benefits compliance needs of Alliant clients.

Our scope of expertise includes issues related to ERISA as well as COVID-19, ACA/Health Care Reform, Plan Documents, COBRA, CARES Act, HIPAA, Cafeteria Plans, Medicare, and compliance standards specific to public sector plans. Alliant also provides a Compliance Calendar for the coming year, which identifies all due dates for required reporting and other compliance activities.

As important, attorney Priya Setty is a member of the GOAA account team as your dedicated compliance consultant. She is available to answer questions and discuss specific regulations and how they apply to your firm via in-person or remote meetings. As needed, Priya can directly engage attorney Kristine Blanco JDL, who is director of national compliance practice to assist on escalated issues.

Our national Compliance department regularly communicates its findings to our client base throughout the plan year, utilizing such media as:

- Weekly compliance eblasts (e.g., please find samples of our “Friday Fast Facts” and “Leave It To Friday” weekly compliance newsletters in the Appendix)
- Issue-specific news releases or updates as needed
- More detailed and in-depth resources, such as:
  - A podcast series (“Compliant with Alliant”)

GOAA  
23-115 Benefit Consultant  
Services

- Quarterly webinars (e.g., 3/1/2022 National Compliance Webinar: “Employer ERISA Fiduciary Duties In the New Era of Transparency”)
  - White papers
  - Client tool kits
  - Plan modelers
  - Compliance calendars
  - Reporting guides
- An online compliance library, in which all the above is maintained, continually updated, and accessible to GOAA through your Alliant Account Management team
  - Online, phone, or email questions or requests for guidance directed to the attorney/compliance consultant on your Alliant account team
  - Every client meeting with Alliant, at which the latest compliance news is a required agenda item

g. Assist with maintaining regulatory compliance as it relates to providing benefit plan coverage for active employees, and retirees [Other Post-Employee Benefits (OPEB)], including advice on data practices, records retention and privacy issues.

Please see response in Letter F above for complete details about the resources and approach. However, the Orlando Alliant team will take full ownership of making sure that GOAA is apprised of all regulatory requirements around the benefit program as part of our relationship. Our commitment is that GOAA will never be caught off guard or surprised in this environment. While Alliant’s corporate resources provide a stellar proactive experience with issues that arise immediately, our Orlando team makes outbound calls to clients to let them know exactly what is happening. Immediate issues relative to health care reform and Covid are examples when items were passed/considered legislatively or shown on the news without complete regulatory guidance.

h. Review and monitor contracts, plan documents and policies to ensure accuracy, completeness, and compliance with the law. Monitor claim performance according to any contractual performance standards and recommend the establishment of additional performance standard agreements with carriers/providers where appropriate.

Alliant will also conduct initial and ongoing compliance audits/reviews/assessments on behalf of GOAA. Additional information is available in Letter F above. This will include monitoring of claim performance. Unfortunately, documents must be reviewed in detail both initially and each time a change is made. Experience has shown that vendors don’t always provide continually updates as expected. It is our responsibility to be sure that all agreed terms are included.

i. Review and analyze relevant data to ensure the Aviation Authority is receiving optimum service and benefits from all carriers and providers.



We continually review and analyze all data available relative to all aspects of carrier partnerships to make sure that GOAA is receiving the optimum overall experience.

**j. Respond promptly and accurately to questions from Aviation Authority representatives.**

Our approach is two-fold:

The Orlando Alliant team will maintain ongoing communication with the GOAA team to proactively and reactively address all concerns. Our commitment is to respond immediately, provide prompt answers and resolution and keep GOAA apprised of all outstanding items.

Additionally, Benefit Advocates is an internal employee help desk service provided by Alliant. Your plan members can engage the service throughout the year to obtain timely, professional assistance with claims issues and other benefits questions or concerns. In addition, we assign specific support professionals to your account, which adds to the knowledge and personalized attention they provide.

**k. Provide ongoing assistance with benefit related education for employees and the Aviation Authority's HR Staff.**

Please see response in Section R. However, we want to reiterate that Alliant is committed to ongoing communication with and education of the Aviation Authority's HR staff. Much of this is formal, but our ongoing connection will provide continuous discussion and education.

**l. Assist in developing wellness initiatives for employees to include assisting with coordination of employee health events and wellness measurement tools.**

Alliant is excited to partner with GOAA to expand its wellness program. GOAA has taken important steps with education and rewards to grow its wellness program. The number of employees obtaining annual physicals and engaging with the tools available is higher than the norm.

The next step is the provision of a significant incentive for employees to develop a relationship with a primary care physician. This is part of the wellness expansion being implemented currently for the 2023 plan year. This will lead both to early detection of potentially serious illnesses but also be part of guiding employees to lead healthier lifestyles. This is first step in a long-term wellness strategy that will continue to expand with different opportunities for GOAA's employees. Nearly 70% of healthcare costs are directly related to modifiable behaviors. Helping employees live healthier lives can produce meaningful healthcare cost savings over time. To this end, Alliant will:

- Assign a Health & Productivity consultant to GOAA who will coordinate Alliant's specialized resources and expertise and help strategize, design, and implement a customized program appropriate to your firm.
- Use data to diagnose issues before prescribing a cure. We use the latest data analytics technology to help understand your population's health risks and

address these problems head-on with targeted strategies. We can also integrate available data (e.g., biometrics, health assessments) from any programs currently in place.

- Conduct employee surveys to assess satisfaction, perceptions, attitudes, and overall employee needs and interests. Using our library of questions, we will work with you to design the survey and determine the best form of administration. Post survey, we will summarize results and work with you to determine actionable insights.
- Make objective and reliable vendor recommendations. Alliant works with multiple preferred partners and providers known for their ability to deliver wellness services such as:
  - Health Risk Assessments
  - Biometric Screening
  - Health Coaching
  - Education and Communication
  - Fitness Activity Tracking
  - Health and Wellness Challenges
  - Incentive Design and Tracking
  - Mental Health programs

m. Assist with the creation and implementation of communication materials (pamphlets, brochures, presentations, etc.) for new or changed programs, including Open Enrollment and health event materials. Assist the Aviation Authority's HR Staff with development of employee benefits statements.

Please see the information in Section C. Alliant is committed to taking the leadership role in developing all communication materials in partnership with American Blueprinting & Supply DBA American Graphix Solutions. While GOAA will have the final say, we provide content, creativity, editing, design and production. 17% of this contract will be in partnership with this minority-owned businesses. Additionally, we have identified two potential minority-owned partners for the future who are working to obtain the designations needed.

n. Provide open enrollment support to include on-line enrollment, explanation of benefit options and conducting and/or attending enrollment meetings, as needed.

Alliant facilitates and supports such important Open Enrollment functions as:

- Creation, review and approval of all open enrollment material
- Event planning
- Carrier coordination
- Review and approval of enrollment documentation
- Colleague communications
- Enrollment meetings and presentations



- Q&A support during the open enrollment period through our Benefit Advocates service, which also provides ongoing colleague support throughout the plan year.
- Reviewing enrollment data with carriers for accuracy

Alliant conducts on-site, in-person enrollment. We can arrange for virtual meetings that utilize either our internal system options or GOAA's comparable technology. Alliant also records virtual meetings, which we password protect and make accessible to plan members and covered dependents at their convenience.

**o. Coordinate employee communication and conduct employee information meetings as new programs are implemented.**

Please see response in Section C below.

**p. Provide consulting advice and cost impact of proposed changes to benefits as requested. Attend the Aviation Authority's Board Meeting(s) (usually September) when Group Health/Benefit Plans are presented for approval. Make presentations to Senior Management and/or Board if required.**

The Alliant team will provide underwriting and actuarial evaluation off all potential plan changes. This includes not only the impact of items like deductible or copay changes, but the impact of changes and contribution on plan enrollment migration. All of this information and analysis will be provided on an executive summary basis to present to leadership for final decisions. Alliant will also develop and make presentations to executives and the board as needed.

Specifically, we work closely with the team at GOAA by working in partnership to create the "board memo" summarizing all of the proposed benefits. Alliant has and will continue to take full responsibility of developing the financial back-up for this process.

**q. Meet with the Aviation Authority staff on a quarterly basis.**

Orlando Team will meet with the Aviation Authority on whatever schedule is desired. We would recommend a quarterly meeting as a minimum. Given the importance of strategic planning for each renewal and the funding options to be considered, we would recommend monthly meetings for full preparation of the 2024 plan years and beyond. Historically, there are months during the cycle when we would meet with GOAA multiple times in a single month.

**r. Serve as a liaison with carriers and providers when service problems or claims issues occur. Provide support to employees on benefit questions and claim issues.**

Alliant will serve as the liaison with all carriers both between the HR team and carriers as well as between employee, family members and retirees and carriers. Leah Wroblewski and Debbie Haas are the direct contacts for employees, members and retirees for addressing all billing and claim issues. This will be supported both through members of the Orlando Alliant team as well as through the national Benefits Advocate team.

Benefit Advocates is an internal employee help desk service provided by Alliant. Your plan members can engage the service throughout the year to obtain timely, professional assistance with claims issues and other benefits questions or concerns. In addition, we assign specific support professionals to your account, which adds to the knowledge and personalized attention they provide.

Areas of support covered by our Benefit Advocates: Benefit questions or clarifications; enrollment and eligibility questions; Open Enrollment support; claims support and issue resolution; denied appeals; prescription problems; HSA and FSA questions (if applicable); COBRA inquiries; and other general benefits questions. Highlights of the service include:

- Staffed by benefit experts who function as trusted advisors
- Provides support for dependents as well as employees
- Available via email or phone (toll-free)
- Convenient hours 8am – 8pm, Monday – Friday
- Advocates are full-time Alliant employees, with secure access to benefits documentation
- All requests for assistance are confidential
- All requests tracked and monitored to resolution
- HIPAA-compliant activity reports are provided
- Same-day response

**s. Conduct benefit surveys as requested and make recommendations based on data.**

Alliant has three methods to directly obtain and assess employee feedback regarding your benefits program:

- Alliant can conduct online satisfaction surveys to help identify which program components have met plan member expectations, and which have not and need to be addressed.
- Our Benefit Advocates service provides HIPAA-compliant reports that will identify and quantify all recurring employee issues that it receives. GOAA and Alliant can then decide if any of these issues are prevalent enough to require corrective action.
- In some cases, it may be productive to conduct focus groups to obtain more detailed and direct employee feedback on areas of concern. (Note that focus groups may also provide an opportunity for GOAA to assess multiple aspects of your employees' experience, including but not limited to benefits.)

**t. Review, monitor and make recommendations, when needed, on the efficiency measures for streamlining plan processes.**

Please refer to Letter D above.

u. [Arrange for the retention of other professional consultants as may be needed and approved by the Aviation Authority.](#)

Alliant will engage subject matter experts as needed though most insurance, actuarial, human resource and legal expertise will be provide by in-house experts. However, we are in talks with a minority-owned business to provide expertise relative to an onsite/near-site clinic application for GOAA.

Subject Matter Experts: Supported by their National Practice management and resources, the SMEs assigned to your team represent all the specialized disciplines needed to help implement high quality, cost-effective benefit programs. Through Alliant's "Matrix Management" model, every SME reports to more than one supervisor or team leader on a case-by-case basis. They are not tied to a specific territory or line of business. As a result, Alliant EB can leverage our intellectual capital to assist each client individually—but without having to impose time limits, territorial restrictions, or chargeback costs.

v. [Provide such other benefit advice and services to the Aviation Authority as is deemed necessary and approved by the Aviation Authority.](#)

Alliant will provide both advice and services on a comprehensive basis. We realize that insurance is only one component of the complex universe of HR. Therefore, our consulting contract will provide both the services requested and, almost always, advice in those areas that tangentially touch benefits. It is extremely rare that something would be considered as “out-of-scope.”

Below is an example of advice related to impact of Covid-19. This is something that wasn't addressed in any past RFP and something none of us could foresee. This is perfect example of our immediate response to challenges that we will face in the future.

**Impact of COVID-19:**

COVID-19 has become an unprecedented "new reality" for businesses, families, and communities. The outstanding response of Alliant combined national Compliance, Underwriting & Analytics, Health & Productivity, and Retirement teams to the COVID-19 pandemic has been unsurpassed in our industry.

Alliant created a COVID-19 task force to produce an impressive (and growing) range of research, resources, and tools that is keeping pace with this critical “moving target.” Their tireless efforts include webinars, guides, templates, legislative alerts, financial impact models, forms, websites, and employer playbooks.

To date, Alliant EB has developed more than 25 different COVID-19 information and planning materials. Representative examples include:

- COVID-19 Cost Containment Checklist
- Compliance Guide
- Options for Employee Benefit Changes due to COVID-19

- COVID Tax Credit Loan Options
- CARES Act - Changes to Your Retirement Plan
- Employee Emotional Health
- Relevant Federal State and Local Leave Legislation
- Return to Work Playbook

All these materials are continually updated to reflect the most current and reliable information—and all are made available to our clients at no additional charge.

w. **Complete analysis of all funding strategies and potential administrative differences.**

The team has provided education, modeling, retrospective reviews and analysis relative to multiple funding options including, but not limited to self-funding. These have been in the form of summary white papers, PowerPoints, Excel documents. The goal has been to provide a comprehensive education of these options and apply those to the actual claims and experience of GOAA.

Alliant will provide comprehensive analysis of financial and administrative implications of different funding strategies that GOAA must consider to be positioned to provide the best benefit program for the future.

Given the cost and complexity of health care, “If you fail to plan, you plan to fail.” Therefore, strategic planning is a cornerstone of Alliant’s methodology and effectiveness. We prepare a strategic benefits plan in conjunction with GOAA, including input from other stakeholders as needed. As your strategic advisor, your Account Executive will work with you and the Alliant team to develop your strategic plan considering all the factors that impact the performance of your program including:

- Market trends
- Your business, culture, employee demographics, and program goals
- Recruitment and retention (competitiveness of program)
- Recent or anticipated growth
- Carrier and vendor options
- Voluntary benefits and perks
- Employee contributions
- Plan design and options
- Funding methods
- GOAA’s claims history and trends
- Employee health and wellness resources and programs
- Regulations and legal exposures
- Program administration

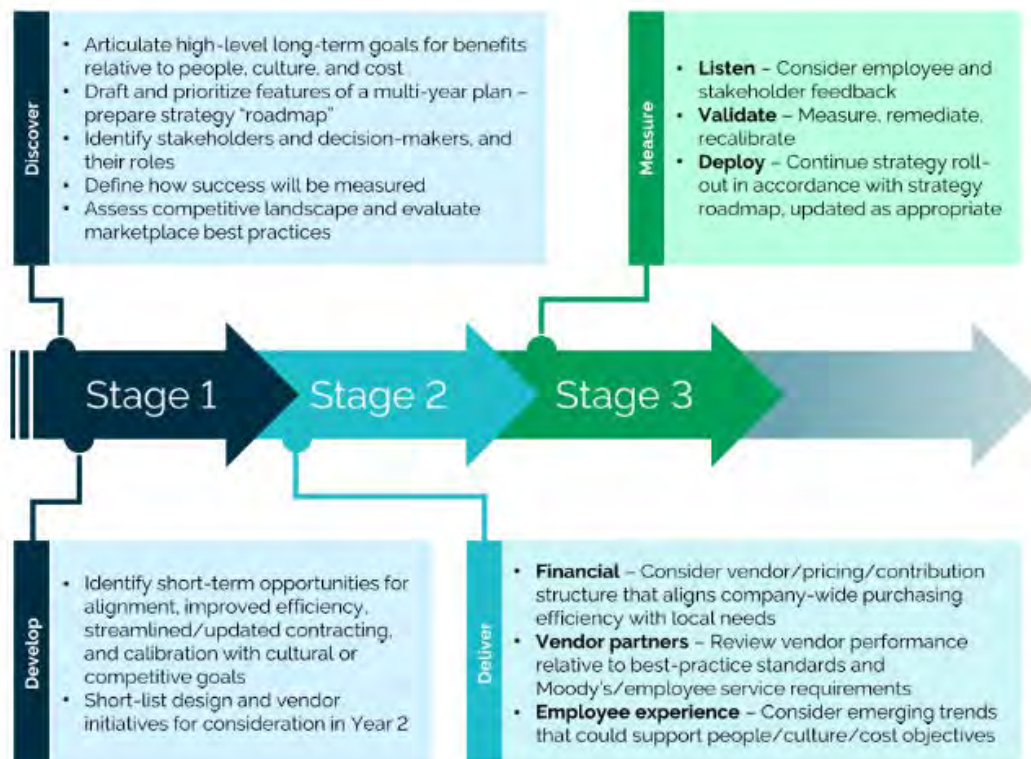
Your strategic plan will address both the current plan year as well as long-term goals. As your benefits program matures (and, most likely, features of the GOAA organization change), we annually re-assess and adjust your strategic plan accordingly.

For each upcoming plan year, we apply our ResultsFirst™ diagnostic process. ResultsFirst helps us “pre-qualify” the latest products, services, and providers to determine which are most appropriate to a specific client, highlighted by cost modeling and predictive analysis. GOAA will receive objective, reliable financial projections for each solution we recommend. You will be able to compare and evaluate their cost impact—and make a fully informed decision for your organization and its employees.

The plan is also the basis for creating an annual Benefits Service Calendar. The calendar captures all the major tasks, deliverables, and responsible parties needed to implement the strategic plan. (In addition, the calendar serves as a tool to hold all participants accountable—including Alliant—for fulfilling their respective responsibilities and commitments on time.

Your program will be fully customized. No generalized assumptions or cookie-cutter “solutions.” Alliant never looks to steer a client in any one direction. We educate our clients on all available options, so they are empowered to make informed decisions in their own best interests.

### Alliant’s Strategic Planning Process





Alliant has been supporting and designing benefit programs for many years and currently has 8,600+ clients. Over the course of all this activity, we have worked closely with every major HRIS provider and system. Alliant has been responsible for assisting the implementation of hundreds of new benefits programs in tandem with HRIS providers.

Alliant will assign a dedicated IT consultant from our internal Employer Technology Consulting department to GOAA's account team. Alliant created this group to contribute to the success of our clients' HRIS solutions from both a technical and organizational perspective. This team of IT consultants will assist in the following:

- Performing a technology needs analysis for the purpose of optimizing benefits functionality and support.
- Assessing the capabilities of current or contemplated systems based on the needs analysis.
- Documenting an appropriate scope of work to identify the roles and responsibilities your carriers and Alliant.
- Providing project management for the implementation.
- Assisting with file feeds and conversion of platforms as needed.
- Fully testing the system and obtaining sign-off before going live.

x. Provide guidance through any benefits related transition including, development of an action plan/timeline, drafting and/or review of plan documents and policies, stop loss recommendations/acquisition, draft and/or review of administrative service agreements and advice regarding all matters concerning compliance and risk mitigation, etc. For self-insured analyses, review and negotiate competitive pharmacy terms and pricing. The Alliant team will provide proactive guidance through each step of any transition process. This starts with extensive education around the types of issues to be addressed during the transition. For example, for a client considering a transition from fully insured to self-funding, this will include discussion of all terms and components as well as both retrospective and prospective modeling.

Alliant will review all terms, conditions, agreements, etc. to be certain that they provide the coverage and services agreed upon while including the best possible provisions for the client. All financial terms will be negotiated in the best interest of the client whether the services are provided on a bundled basis by one vendor or an a la carte basis. If multiple vendors are used, the integration will be completed managed by Alliant.

The following is a list of the standard financial analyses GOAA will receive on an ongoing basis throughout the plan year (depending on availability of data and method of funding):

- **Carrier Claims Data and Financial Monitoring Reports:** These reports examine ongoing claims, premium/budget, and enrollment data. (Monthly for self-funded

plans; quarterly or less frequently for fully insured plans subject to carrier-provided data.)

- **Benchmarking of Plan Designs:** We apply benchmarking data to inform all of our analyses in the development of alternative plan options and strategies. We draw from multiple data sources to enhance the range, accuracy, and quantity of data. (Annual or as needed)
- **Health Plan Actuarial Modeling:** We measure the impact of plan changes, stop loss premiums, and shifts in underlying risk, and model the impact on cost and employee behavior due to changes in benefit plan provisions. (Annual)
- **Pre-Renewal Projection:** To prepare for changes in plan costs, we provide a pre-renewal projection a minimum of six months prior to the actual renewal date. (Annual)
- **Recalculation of Carrier Renewal:** This analysis helps to identify and question carrier assumptions and drive the process of renegotiating the carrier's renewal submission. (Annual)
- **Pharmacy Benefits Analysis:** We analyze use of national pharmacy networks, pharmacy benefit modeling tools, and other services to help reduce Rx costs. (Annual)
- **Contribution Strategy Modeling:** We model and compare multiple contribution scenarios to determine which approach best meets the needs of our clients. (Annual) For example, please see [Exhibit P](#).
- **Claims and Medical Service Utilization:** We analyze reported data for financially relevant information to understand claim drivers and recommend targeted, client-specific strategies to reduce the cost of claims. (Semi-annual)
- **IBNR Reserves:** We project the level of funding needed to pay Incurred But Not Reported claims for self-funded plans. (Frequency depends on client specific factors and needs. Actuarial Attestation provided if needed as well)
- **Stop Loss Projections:** We calculate the appropriate levels of stop-loss protection for self-funded plans.
- **Financial Projections:** We calculate single and multiple projections of your benefit spend based on actual plan designs and contemplated changes; our analysis also factors in other financial aspects of your benefits program (contributions, employee plan migration assumptions, funding arrangement, etc.).
- **Alternative Funding Modeling:** Perform claims analyses and financial scenarios to assess the cost impact of alternative funding methods.
- **Provider Network Discount Analysis and Provider Specific Disruption Analysis:** For self-funded accounts, evaluate and compare available carrier network discounts and provider access and disruption analyses to help ensure the

best financial return for the client/plan sponsor and ensure appropriate provider match and coverage access for health plan members.

- **Special Projects:** As determined by requests from GOAA and project specifications.

## B. Transition Plan

The Transition Plan shall describe in detail, including a timeline, what the Proposer will do to ensure the benefit plan renewal documents are complete, correct, and compliant in accordance with negotiated terms for Plan Year 2024. Submit a Transition Plan based on the following information:

Alliant is the incumbent broker for GOAA. If you choose to continue our engagement, there will be no need for transition services. There will be no disruption of service. No time or resources will have to be allocated for broker orientation. Alliant fully understands the history, goals, procedures, values, etc. reflected in your benefits program. It is important to note that our two firms have an established, proven relationship that continues to grow each year, which only adds to our effectiveness working together.

However, the above points are meaningful to your broker decision only because a more significant fact is also true: Alliant demonstrated – and continues to demonstrate - our ability to provide exceptional cost savings and quality service throughout our tenure as your broker. GOAA can depend on Alliant in both the areas of service and savings—and no transition period is necessary. With Alliant, the months indicated below will be spent preparing for the January 2023 renewal beginning with our annual pre-renewal strategy meeting and building on our three-year benefits strategy. Numerous benefit plan levers were identified through Alliant's Medical Plan Optimizer tool, which will be revisited in conjunction with Plan IQ.

Plan IQ and Alliant Health Score use demographic data to reveal how behaviors and overall health are affected by age, race, and socio-economic factors, enabling us the ability to understand these social determinants of health and their cost impact. For information about Plan IQ, please see [Exhibit O](#).

Alliant will begin evaluation of plan design and funding alternatives in January of 2023. This will include an RFP for all lines of coverage and vendors that GOAA would want to consider for 2024. While final pricing may not be available until the summer, the strategy can be finalized shortly before or after the current consulting contract ends

1. March 31, 2023 - The current Benefit Consultant contract expires.
2. April 1, 2023 – RFP for all lines of coverage will have been completed with preliminary pricing contingent on finalization.
3. April 2023 – Complete all review with Human Resources and Finance in preparation for May board review of preliminary direction.



4. May 2023 – Complete network disruption analysis specific to the network(s) selected.
5. May 2023 – Present recommendation to board
6. June 2023 – Develop draft board memo and financial back-up in concert with directional recommendation.
7. June/July 2023 - Begin employee communications regarding any change in benefits, wellness targets, benefit access, etc. to minimize impact of any changes.
8. August 2023 – Present to board for final approval pending any pricing variations for stop loss coverage assuming direction of self-funding is taken.
9. September 2023 – Pre-Enrollment Education
10. October 2023 – Open Enrollment
11. October/November – All self-funding logistics (banking, processes, imprest, etc.) finalized.
12. December 1, 2023 – Final submission of all eligibility to carrier.
13. January 1, 2024 – Effective Date

Alliant will begin evaluation of plan design and funding alternatives in January of 2023. This will include an RFP for an and all services and vendors that GOAA would want to consider for 2024. While final pricing may not be available until the summer, the strategy can be finalized shortly before or after the current consulting contract ends. Please see Client Timeline in [Exhibit D](#) for more details.

### C. Communication Plan

Include the proposed method for communication and coordinating with the Aviation Authority, its program HR management team and consultants. Provide a sample of work product for benefits communications.

#### Employee Communications Capabilities

Alliant views employee communications and engagement as both (1) an essential function of any successful benefits program; and (2) one of our core responsibilities as your broker/consultant. For these reasons, Alliant will develop an annual communications plan in conjunction with (and subject to approval by) GOAA. More information and samples in [Exhibits G, H, F, J](#).

The plan will place major emphasis on the Open Enrollment period, but will also address ongoing needs to support GOAA colleagues in:

- Improving their understanding of how their health plan works
- Reducing the cost of medical services and out-of-pocket expenses
- Effectively managing chronic conditions

- Preventing illness and improving overall health and wellness
- Understanding their health benefits as new hires joining GOAA' workforce throughout the plan year
- Receiving assistance and having questions answered as needed
- Giving feedback about their benefits and their experience as plan members

Communicating benefits information is often an inefficient and costly process for employers. Alliant has the resources to develop communications materials that successfully inform and motivate, using an appropriate mix of messaging, visual impact, and media sources. The following is a review of our primary communications tools and resources. (See [Exhibit F, G, I](#) for colleague communication samples.)

### 1. CampaignBuilder

Alliant efficiently creates professional communications materials by utilizing our proprietary online resource [CampaignBuilder](#). This system gives each client a range of striking design templates and base content to choose from, all of which can be easily customized with specific benefits information for GOAA. For more information on Campaign Builder, please see [Exhibit E](#).



CampaignBuilder not only provides printed materials, but also non-print media such as presentations, e-blasts, and a library of educational videos on benefits topics. Examples of the communications functionality of the system include, but are not limited to:

- Benefit summaries
- Annual notices
- Medical plan comparisons
- Open Enrollment materials (OE kickoff / emails / presentations)
- Benefits glossary
- Prescription drug information
- HDHP-HSA-HRA campaigns
- FSA reminders
- Newsletters
- Health and wellness information and education



## 2. MyBenefits.Life

Colleagues will have use of our MyBenefits.Life app, which is available for iPhone and Android as well as desktops.

MyBenefits.Life gives employees and covered dependents 24/7 access to information and assistance regarding their benefits program. Support provided through our app addresses, but is not limited to:

- Health plan highlights
- Cost of care scenarios
- Online videos
- FAQs
- Benefits-related contacts
- Wellness tips
- Plan ID cards
- Timely reminders and advice from HR

The app is easy to learn with online tutorials and other training resources. It is available to plan members at no additional cost to them or GOA. This service can be implemented after plan information is approved and installed in the system. For more information on MyBenefits Life, please see [Exhibit F](#).



## Open Enrollment Services

Alliant annually facilitates and supports such important Open Enrollment functions as:

- Event planning (More information in [Exhibit E, K](#))
- Carrier coordination (More information in [Exhibit N](#))
- Review and approval of enrollment documentation
- Colleague communications (More information in [Exhibit G, H, I](#))
- Enrollment meetings and presentations
- Q&A support during the open enrollment period through our [Benefit Advocates service](#), which also provides ongoing colleague support throughout the plan year. (More information in [Exhibit J](#).)
- Reviewing enrollment data with carriers for accuracy

Alliant conducts on-site, in-person enrollment meetings for any location with a minimum of 50 colleagues. For locations with fewer than 50 colleagues, we can arrange for

virtual meetings that utilize either our internal system options or GOAA's comparable technology. Alliant also records virtual meetings, which we password protect and make accessible to plan members and covered dependents at their convenience.

#### D. MWBE Participation Plan

The Aviation Authority has set a MWBE participation goal of seventeen percent (17%) for this solicitation, please provide the level of MWBE participation that will be provided, and what services will be performed by the MWBE firm.

Alliant is extremely excited to partner with an MBWE entity that will receive a minimum of 17% of our proposed contract. We have identified and coordinated with the following firm who is currently certified:

#### Certified Profile

#### Business & Contact Information

BUSINESS NAME	American Blueprinting & Supply, DBA American Graphix Solutions
OWNER	Ms. Tammy Zegowilz-Smith
ADDRESS	750 Clay Street Winter Park, FL 32789 <a href="#">[map]</a>
PHONE	407-644-5366
FAX	407-644-1980
EMAIL	<a href="mailto:tammy@agsorlando.com">tammy@agsorlando.com</a>
WEBSITE	<a href="http://www.americangraphixsolutions.com">http://www.americangraphixsolutions.com</a>

#### Certification Information

CERTIFYING AGENCY	Orange County Florida
CERTIFICATION TYPE	WBE - Women Business Enterprise
EXPIRATION DATE	12/31/2023
CERTIFIED BUSINESS DESCRIPTION	Blueprinting services, CAD plotting, digital design services, wide format printing services, bindery & fulfillment services

Additionally, we have identified the following potential partners who are in the process of becoming certified:

Jason Littleton, MD  
Wellness Strategy

From his website:

The health and wellbeing of your team is an invaluable resource that you can invest in them to minimize stress, absenteeism, curtail infection while promoting well-being and a healthy energized work environment.

A team that does not have to worry about tangential health matters driven by healthcare insurance plan requirements is a focused team that can give their efforts towards the advancement of the overall corporate goal.



**Raegan Le Douaron**

President & CEO

999 Douglas Ave, Suite 1119, Altamonte Springs, FL 32714

Local: 407-562-1212 opt. 2 · Toll Free: 800-941-0644

Cell: 407-416-2591 · Fax: 407-804-2971

Raegan.Garber@WeCaretlc.com

Raegan's company works with corporate wellness including the evaluation and installation of on-site/near site clinics.

## Tab 5 – Proof of Insurance

---

*The Proposer's submittal shall demonstrate ability to meet all portions listed in Section 3.7 Insurance Requirements by providing evidence of one of the following:*

1. Certificate of Insurance on Acord form or form acceptable to Aviation Authority, or
2. Signed affirmation of ability to comply from a licensed insurance agent, or Insurance quote.

Please see **Exhibit C** for all necessary certificates as required above.

## Tab 6 – Prior or Pending Convictions, Indictments, Investigations, Regulatory Investigations, and Conflicts of Interest

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**A.** The Proposer shall provide a description of all prior or pending convictions, indictments, investigations, and regulatory investigations, either civil or criminal that relate to arbitrage rebate calculation services, in which Proposer or its affiliates, subsidiaries, parent company, directors, senior officers, senior regional officers, the Lead Individual, or Engagement Team members have been involved with in the last five (5) years immediately preceding the date of Proposer's response to this RFP. *Or provide an affirmative statement that there are none.*

Alliant Insurance Services, Inc. is a party to certain legal proceedings consistent with a business and business enterprise of its size and scale. None of the proceedings, or their resolution, will have any bearing on Alliant's viability or ability to deliver the services outlined in this proposal.

### **B. Conflict of Interest/Representation of Other Clients**

Describe any conflicts of interest with the Aviation Authority that the Proposer's has or may have, including with any other parties who are potentially involved in any contemplated financings of the Aviation Authority, and how that conflict of interest would be mitigated.

1. Identify any current clients which may represent a possible conflict.  
To the best of our knowledge no employee, officer, or director within our firm has any relationship with individuals associated with Greater Orlando Aviation Authority.
2. Identify any clients, current or within the past five (5) years that are airports or transportation firms or vendors who do business the Aviation Authority.  
JSM & Associates was a client for the consultants with their former employer for approximately one year prior to their departure.
3. Identify any current clients which may complement this association.  
To the best of our knowledge no clients may complement this association.
4. Describe how conflicts of interest would be mitigated or provide a statement that there are none.  
To the best of our knowledge there are no conflicts of interest that would need mitigation.

### **C. Claims Information**

Disclose all lawsuits, arbitrations and claims filed or raised by or against the Proposer over the last five (5) years, specifically identifying the project involved, the parties involved, the nature of the claim(s), amount at issue, disposition or status and litigation, case style, number, and jurisdiction.



GOAA  
23-115 Benefit Consultant  
Services

Alliant Insurance Services, Inc. is a party to certain legal proceedings consistent with a business and business enterprise of its size and scale. None of the proceedings, or their resolution, will have any bearing on Alliant's viability or ability to deliver the services outlined in this proposal.

## Tab 7 - Additional Information

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### **Strategies to Mitigate Rising Pharmacy Costs:**

Prescription drugs have become one of the major drivers of increased healthcare costs—they typically represent 30% of all employee claims.

As the highest touched and most utilized member benefit, offering pharmacy benefits comes with some tough decisions for the plan sponsor. From deciding which vendor would be best suited to manage the pharmacy benefit for your organization, to knowing how the latest pharma trends impact costs, the process is technical and complicated.

Alliant's National Pharmacy Consulting practice is comprised of a deep bench of dedicated consultants, clinical pharmacists, analysts, supporting actuaries, and former industry executives. (A pharmacy consultant is a permanent member of your Alliant account team.) We collect, review, and make recommendations based on four major categories of each client's specific Rx vendor data:

- Pricing/Contracts
- Drug Mix and Utilization
- Delivery Channels
- Clinical Program Support

Our National Pharmacy Practice has a proven track record of delivering the most aggressive results in our industry. Across our book of business, Alliant has achieved an average first year cost savings of 17% on pharmacy spend for new clients that have gone our Pharmacy Diagnostic process and implemented our recommendations. Alliant's National Pharmacy Practice is comprised of PBM industry innovators and experts who have a diverse background of pharmacy experience. Our resources include former PBM executives in addition to a deep bench of dedicated pharmacists, pharmacy consultants, pharmacy analysts, and supporting actuaries. We understand that not one client is alike and work to understand the nuances of our clients, helping align our consulting expertise with our client's short and long-term strategic goals and objectives.

At the foundation of Alliant's on-going pharmacy consulting support resides our expertise in PBM contract and vendor management. We help our clients understand the subtleties within their PBM vendor contract and negotiate market leading terms to as great an extent as possible to ensure that their pharmacy relationship is on solid footing. The pharmacy consultant on your account team will conduct a comprehensive pharmacy diagnostic analysis to test and objectively evaluate the price competitiveness and service components of the program. Based on our findings, we make recommendations that provide the most value and align with your objectives. The components we address include, but are not limited to:

### Comprehensive Pharmacy Diagnostic



Alliant can also be engaged to conduct all subsequent pharmacy marketing and negotiations. As part of our marketing efforts, we will compare offers from a curated group of diverse PBMs, in order to ensure that your final selection results in the best possible financial outcome and service delivery.

Across our book of business Alliant has been able to negotiate **average cost savings of 17%** on pharmacy spend, based on the findings of our Pharmacy Diagnostic Analysis. For more information, please see [Exhibit L](#).

### Importance of Voluntary Benefits

For many employers and their brokers, offering voluntary benefits is often a haphazard process to give employees “extra” options at little or no cost or obligation to the organization. In contrast, Alliant recognizes voluntary benefits as a strategic opportunity that allows us to help clients add value to the core programs, strengthen the overall benefits approach to support recruitment and retention initiatives, and increase employee satisfaction.

Alliant’s National Voluntary Benefits Practice has extensive experience in developing effective voluntary programs that align and integrate with an employer’s overall benefit offerings. In considering the selection of voluntary benefits, we look to determine: (1) Can they supplement existing coverage levels or fill any gaps in the group health plan? (2) Are they responsive to strong needs or preferences within the population? In addition (3) would their addition help make the client more competitive in the job market?

We begin this initiative by examining the client’s current core and voluntary offerings to identify:

- Potential needs (through the use of benchmarking studies and/or employee surveys for direct feedback)
- The latest industry products and trends

- Any benefit shortcomings in the group plans those voluntary benefits might address (such as additional cancer coverage, elder care benefits, etc.)

We then work with the client to develop a responsive ongoing strategy. Included in our strategy is the targeted use of communications to educate employees about the value of voluntary benefits and help drive enrollment.

### **Regulatory and Administrative Requirements for Leave Management.**

Alliant's Absence Management practice represents the largest and most formidable collection of absence, disability, and life management expertise in the industry. In addition to having one of the largest Leave/National Absence Management Practice's in the country, it also combines the aggregation of two highly regarded specialty firms acquired by Alliant over the last 10 years (American Benefits Consulting and Sagewell Partners), with the continued addition of top industry talent from the consulting and insurance carrier community. Our Absence Management practice excels because these types of programs are its sole and primary focus, and our professionals are tenured, dedicated, Leave experts.

A subject matter expert can consult with GOAA's HR department in such areas as: -

- Leave qualification standards
- Compliance reviews and support (FMLA, ADAAA, PFL, PSL, etc.)
- Strategy development
- Cost modelling, contribution structuring, and planning
- Day-to-day support, issue resolution, and vendor management
- Effect of leave rules on other benefits programs such as Workers' Compensation, Casual Absences Sick Days, PTO Days/Banks, Free Time Off, Military Leave, and ADAAA.
- Evaluation of automated tools for leave tracking and related functions
- Alliant also offers a self-service subscription-based product called Alliant Leave Advantage. GOAA would receive:
- Weekly Legislative Tracking, Analysis, and Reporting: Track leave developments online as the service provides news and updates at the federal, state, and local levels.
- Tailored Leave Risk Analysis by Zip Code: This thoughtful technology quickly creates a detailed, custom analysis of your organization's leave law liabilities by jurisdiction. With minimal effort on your part, you receive a complete and accurate overview of leave liability on a national scale, enabling you to quickly identify risks and prioritize your area of concern.
- Template Policies: Gain federal, state, and local leave policy templates to review with your own counsel for easy implementation and compliance.

Alliant Leave Advantage ("ALA") normally has a monthly subscription fee which includes the above bulleted deliverables. Please see [Exhibits K, M, N](#) for more information.

**Alliant Retirement Consulting (ARC)**

ARC is a wholly owned subsidiary of Alliant Insurance Services, Inc. John Cunningham, the ARC consultant, and Executive Manager on your benefits account team, has over 25 years of experience and is a recognized leader in the Retirement Services industry. ARC is uniquely positioned to service all types of employer-sponsored retirement plans from qualified plans (such as 401(k), 403(b), and Defined Benefit plans) to non-Qualified plans and ESOP plans, leveraging both our seasoned investment team and partnership with an in-house TPA and actuarial staff. ARC also has the capability to serve as a 3(21) or 3(38) Co-Fiduciary and our in-house TPA frequently serves as 3(16) Co-Fiduciary for our TPA and Advisory clients. We also help our clients recruit and retain key employees through our deep knowledge of plan designs, compliance regulations, and financing approaches such as Corporate-Owned Life Insurance (COLI), Equity Financing and unfinanced plans.

ARC will conduct an initial assessment of GOAA's retirement plans at no cost. All subsequent ongoing services would be fee-based as they are not included as part of our proposed compensation for benefits brokerage/consulting.

**Medicare Assistance**

Alliant Medicare Solutions is the nation's largest sales and consulting firm for Medicare programs. It offers a white glove, concierge approach to Medicare. Experts are available to guide individuals through a comprehensive process, discuss their options, and ensure that they make the right choice for their needs.

This specialized service can be valuable for employees who are either approaching Medicare age themselves or trying to help aging parents or grandparents obtain coverage. There is no additional cost for this service.

Tab 8 - Response Forms to be turned into the Aviation Authority

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**Response Forms to be turned into the Aviation Authority**

# FLORIDA DEPARTMENT of FINANCIAL SERVICES

## ALLIANT INSURANCE SERVICES, INC.

701 B STREET 6TH FLOOR  
SAN DIEGO CA 92101-8156

Agency License Number L038815

Location Number: 151889

Issued On 11/28/2006

Pursuant To Section 626.0428, Florida Statutes, This Agency Location Shall Be In The Active Full-Time Charge Of A Licensed And Appointed Agent Holding The Required Agent Licenses To Transact The Lines Of Insurance Being Handled At This Location.

Pursuant To Subsection 626.172(4), Florida Statutes, Each Agency Location Must Display The License Prominently In A Manner That Makes It Clearly Visible To Any Customer Or Potential Customer Who Enters The Agency Location.



Jeff Atwater  
Chief Financial Officer  
State of Florida

**2022 FOREIGN PROFIT CORPORATION ANNUAL REPORT**

DOCUMENT# F02000003013

**Entity Name:** ALLIANT INSURANCE SERVICES, INC.

**Current Principal Place of Business:**

1301 DOVE STREET  
SUITE 200  
NEWPORT BEACH, CA 92660

**Current Mailing Address:**

1301 DOVE STREET  
SUITE 200  
NEWPORT BEACH, CA 92660 US

**FEI Number:** 33-0785439

**Certificate of Status Desired:** No

**Name and Address of Current Registered Agent:**

CORPORATION SERVICE COMPANY  
1201 HAYS STREET  
TALLAHASSEE, FL 32301-2525 US

*The above named entity submits this statement for the purpose of changing its registered office or registered agent, or both, in the State of Florida.*

SIGNATURE: \_\_\_\_\_

Electronic Signature of Registered Agent

\_\_\_\_\_ Date

**Officer/Director Detail :**

Title CEO, CHAIRMAN, DIRECTOR  
Name CORBETT, THOMAS W.  
Address 1301 DOVE STREET, SUITE 200  
City-State-Zip: NEWPORT BEACH CA 92660

Title PRESIDENT, DIRECTOR  
Name ZIMMER, P. GREGORY JR.  
Address 1301 DOVE STREET, SUITE 200  
City-State-Zip: NEWPORT BEACH CA 92660

Title PRESIDENT, SENIOR EXECUTIVE VICE PRESIDENT, DIRECTOR  
Name HURST, RALPH S  
Address 1301 DOVE STREET, SUITE 200  
City-State-Zip: NEWPORT BEACH CA 92660

Title TREASURER, EXECUTIVE VICE PRESIDENT  
Name FILLEY, TED C  
Address 1301 DOVE STREET  
City-State-Zip: NEWPORT BEACH CA 92660

Title COO, SENIOR EXECUTIVE VICE PRESIDENT  
Name CARPENTER, PETER  
Address 1301 DOVE STREET, SUITE 200  
City-State-Zip: NEWPORT BEACH CA 92660

Title CFO, SENIOR EXECUTIVE VICE PRESIDENT  
Name ANDERS, ILENE  
Address 1301 DOVE STREET, SUITE 200  
City-State-Zip: NEWPORT BEACH CA 92660

Title SECRETARY  
Name BAUMANN, JENNIFER  
Address 1301 DOVE STREET SUITE 200  
City-State-Zip: NEWPORT BEACH CA 92660

*I hereby certify that the information indicated on this report or supplemental report is true and accurate and that my electronic signature shall have the same legal effect as if made under oath; that I am an officer or director of the corporation or the receiver or trustee empowered to execute this report as required by Chapter 607, Florida Statutes; and that my name appears above, or on an attachment with all other like empowered.*

SIGNATURE: JENNIFER BAUMANN

SECRETARY

04/22/2022

\_\_\_\_\_ Electronic Signature of Signing Officer/Director Detail

\_\_\_\_\_ Date



# FLORIDA DEPARTMENT OF FINANCIAL SERVICES

***CHARLES PATRICK COOK***

***License Number : A053659***

## **Resident Insurance License**

- 0216 - LIFE
- 0240 - HEALTH
- 0220 - GENERAL LINES (PROP & CAS)
- 0218 - LIFE & HEALTH

## **Issue Date**

10/10/1987  
10/10/1987  
08/25/1993  
10/10/1987

### **Please Note:**

A licensee may only transact insurance with an active appointment by an eligible insurer or employer. If you are acting as a surplus lines agent, public adjuster, or reinsurance intermediary manager/broker, you should have an appointment recorded in your own name on file with the Department. If you are unsure of your license status you should contact the Florida Department of Financial Services immediately. This license will expire if more than 48 months elapse without an appointment for each class of insurance listed. If such expiration occurs, the individual will be required to re-qualify as a first-time applicant. If this license was obtained by passing a licensure examination offered by the Florida Department of Financial Services, the licensee is required to comply with continuing education requirements contained in 626.2815 or 648.385, Florida Statutes. A licensee may track their continuing education requirements completed or needed in their MyProfile account at <https://dice.fdfs.com>. To validate the accuracy of this license you may review the individual license record under "Licensee Search" on the Florida Department of Financial Services website at [www.myfloridacfo.com/division/agents](http://www.myfloridacfo.com/division/agents).



Jimmy Patronis  
Chief Financial Officer  
State of Florida



# CHARLES COOK

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Executive Vice President

## EXPERIENCE

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Current

### ALLIANT INSURANCE SERVICES

EVP, CONSULTANT

Establishes overall benefit program goals and financial objectives of the benefits program. Provides oversight of strategic planning and leads all collaborative consulting efforts. Responsible for performance of all personnel and resources assigned to account Responsible for the acquisition and maintenance of a customer base that represents 2M+ of premium revenue.

1989 - 2022

### MCGRIFF INSURANCE SERVICES (SUBSIDIARY OF TRUIST)

SENIOR VP, CONSULTANT

Acquired and maintained 2M+ book of business. Negotiated renewal, provided budget projections, underwriting analyses, updated clients on new legislation, new products in the marketplace, advised clients on how these changes could impact them and their business, oversaw a service team and delivered superior service to clients.

## EDUCATION

---

1985

### FLORIDA STATE UNIVERSITY, TALLAHASSEE, FL

MASTER'S OF PUBLIC ADMINISTRATION

BACHELOR OF EDUCATION: REHABILITATION COUNSELING

## CONTACT

---



(407) 963-3266



charles.cook@alliant.com



www.alliant.com



271 N. Pennsylvania Avenue  
Winter Park, FL 32789



# ANDREW FOX

---

Vice President

## EXPERIENCE

---

Current

### ALLIANT INSURANCE SERVICES

VP, CONSULTANT

Establishes overall benefit program goals and financial objectives of the benefits program. Provides oversight of strategic planning and leads all collaborative consulting efforts. Responsible for performance of all personnel and resources assigned to account

2011 - 2022

### MCGRIFF INSURANCE SERVICES (SUBSIDIARY OF TRUIST)

SENIOR VP, CONSULTANT

Negotiated renewal, provided budget projections, underwriting analyses, updated clients on new legislation, new products in the marketplace, advised clients on how these changes could impact them and their business, oversaw a service team and delivered superior service to clients.

## EDUCATION

---

2010

### FLORIDA STATE UNIVERSITY, TALLAHASSEE, FL

BACHELOR OF SCIENCE: FINANCE

## CONTACT

---



(407) 739-0619



andrew.fox@alliant.com



www.alliant.com



271 N. Pennsylvania Avenue  
Winter Park, FL 32789



# AMY KIMBERLIN

Financial & Benefits Analyst

## EXPERIENCE

Current

### ALLIANT INSURANCE SERVICES

#### FINANCIAL ANALYTICS/BENEFITS ANALYST

Manages the underwriting, financial, and analytics functions for your account. Studies cover financial projections, renewal shopping and presenting calculations, claims reporting, utilization, contribution modeling, benchmarking, and funding models. Responsible for best practices and quality control for client financials. Coordinates data warehousing and health informatics services.

2002 - 2022

### MCGRIFF INSURANCE SERVICES (SUBSIDIARY OF TRUIST)

#### SENIOR BENEFITS SPECIALIST

Maintained client and carrier relationships, provided support materials for renewal and prospect presentations, created and designed employee brochures, enrollment presentations, marketed RFPs for current clients as well as responded to formal Broker RFPs, tracked revenue for producers, provided critical support for all phases of the sales and renewal process, created training materials and trained new hires in position.

## EDUCATION

2001

### UNIVERSITY OF FLORIDA, GAINESVILLE, FL

BACHELOR OF SCIENCE IN BUSINESS ADMINISTRATION:  
MAJOR MARKETING

## CONTACT



(540) 234-5601



amy.kimberlin@alliant.com



www.alliant.com



271 N. Pennsylvania Avenue  
Winter Park, FL 32789



# LEAH WROBLESKI

Consultant/Account Executive

## EXPERIENCE

Current

### ALLIANT INSURANCE SERVICES

#### CONSULTANT/ACCOUNT EXECUTIVE

Provides strategic planning. Monitors program progress and actively responds to client feedback. Directs program transition management, program implementation, reporting, benchmarking, vendor management and negotiations, and ongoing quality assurance. Leads/participates in scheduled and as needed client meetings. Coordinates account team's subject matter experts and other resources.

2021 - 2022

### STELLAR INSURANCE AGENCY

#### PRINCIPAL/OWNER

An expert in the employee benefits field helping employers manage costs effectively and develop strategies to meet their goals and objectives surrounding their employee benefit programs.


## EDUCATION

1992

### UNIVERSITY OF CENTRAL FLORIDA, ORLANDO, FL


BACHELOR OF SCIENCE IN BUSINESS ADMINISTRATION,  
MAJOR IN MARKETING

## CONTACT

 (407) 340-3700

 leah.wroblewski@alliant.com

 www.alliant.com

 271 N. Pennsylvania Avenue  
Winter Park, FL 32789



# DEBBIE HAAS

---

Account Manager

## EXPERIENCE

---

Current

### ALLIANT INSURANCE SERVICES

#### ACCOUNT MANAGER

Supports Account Executive in directing daily program operations, including but not limited to coordination and administration of services, vendor liaison activities, open enrollment, and employee communications. Assists with general billing and claims issues.

2014 - 2022

### MCGRIFF INSURANCE SERVICES (SUBSIDIARY OF TRUIST)

#### ASSISTANT ACCOUNT MANAGER

Supports Account Manager in directing daily program operations, including but not limited to coordination and administration of services, vendor liaison activities, open enrollment, and employee communications. Assists with general billing and claims issues.

## EDUCATION

---

1993


### SEMINOLE STATE COLLEGE

#### ASSOCIATE OF ARTS DEGREE

General Studies


## CONTACT

---

 (407) 768-9320

 [debbie.haas@alliant.com](mailto:debbie.haas@alliant.com)

 [www.alliant.com](http://www.alliant.com)

 271 N. Pennsylvania Avenue  
Winter Park, FL 32789



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
**12/04/2021**

**THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.**

**IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).**

<b>PRODUCER</b> New York- E.45th-Alliant Ins Svc Inc 140 East 45th St Ste 6B New York, NY 10017	<b>CONTACT NAME:</b> michele.rodriguez@alliant.com <b>PHONE (A/C, No, Ext):</b> _____ <b>FAX (A/C, No):</b> _____ <b>E-MAIL ADDRESS:</b> _____
<b>INSURER(S) AFFORDING COVERAGE</b>	
<b>INSURER A : Evanston Insurance Company</b>	
<b>NAIC #</b>	
<b>35378</b>	
<b>INSURER B :</b> _____	
<b>INSURER C :</b> _____	
<b>INSURER D :</b> _____	
<b>INSURER E :</b> _____	
<b>INSURER F :</b> _____	

**COVERAGES** **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER: _____						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ _____ \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ _____ \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED _____ RETENTION \$ _____						EACH OCCURRENCE \$ AGGREGATE \$ _____ \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y / N If yes, describe under DESCRIPTION OF OPERATIONS below						PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
<b>A</b>	<b>Prof. Liability</b>			<b>MKLV7PL0004438</b>	<b>12/15/2021</b>	<b>12/15/2022</b>	<b>Each Claim/Aggregate \$10,000,000</b>

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**

This is a Claims Made Policy

<b>CERTIFICATE HOLDER</b>  <p style="text-align: center;">For Informational Purposes Only</p>	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE <i>Fred T. Podilly</i>
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# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
3/9/2022

**THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.**

**IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).**

<b>PRODUCER</b> Crystal IBC, LLC 560 Mission St., 6th Floor San Francisco, CA 94105	<b>CONTACT NAME:</b> Heather Shoemaker Williams <b>PHONE (A/C No. Ext):</b> 628-502-2836 <b>FAX (A/C, No):</b> <b>E-MAIL ADDRESS:</b> AlliantCorporateCerts@alliant.com														
<b>INSURED</b> Alliant Holdings, L.P. Alliant Insurance Services, Inc. CSHC Intermediate Holdings, Inc. 1301 Dove St Ste 200 Newport Beach CA 92660	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="text-align: center;">INSURER(S) AFFORDING COVERAGE</th> <th style="text-align: center;">NAIC #</th> </tr> <tr> <td>INSURER A : Federal Insurance Company</td> <td style="text-align: center;">20281</td> </tr> <tr> <td>INSURER B : ACE American Insurance Company</td> <td style="text-align: center;">22667</td> </tr> <tr> <td>INSURER C : ACE Fire Underwriters Insuranc</td> <td style="text-align: center;">20702</td> </tr> <tr> <td>INSURER D :</td> <td></td> </tr> <tr> <td>INSURER E :</td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> </tr> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A : Federal Insurance Company	20281	INSURER B : ACE American Insurance Company	22667	INSURER C : ACE Fire Underwriters Insuranc	20702	INSURER D :		INSURER E :		INSURER F :	
INSURER(S) AFFORDING COVERAGE	NAIC #														
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INSURER B : ACE American Insurance Company	22667														
INSURER C : ACE Fire Underwriters Insuranc	20702														
INSURER D :															
INSURER E :															
INSURER F :															

**COVERAGES** **CERTIFICATE NUMBER: 102029046** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS																
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b>  <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:			3605-39-43 NBO	3/1/2022	3/1/2023	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>EACH OCCURRENCE</td><td style="text-align: right;">\$ 1,000,000</td></tr> <tr><td>DAMAGE TO RENTED PREMISES (Ea occurrence)</td><td style="text-align: right;">\$ 1,000,000</td></tr> <tr><td>MED EXP (Any one person)</td><td style="text-align: right;">\$ 10,000</td></tr> <tr><td>PERSONAL &amp; ADV INJURY</td><td style="text-align: right;">\$ 1,000,000</td></tr> <tr><td>GENERAL AGGREGATE</td><td style="text-align: right;">\$ 2,000,000</td></tr> <tr><td>PRODUCTS - COMP/OP AGG</td><td style="text-align: right;">\$ 2,000,000</td></tr> <tr><td>Deductible</td><td style="text-align: right;">\$ 0</td></tr> </table>	EACH OCCURRENCE	\$ 1,000,000	DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 1,000,000	MED EXP (Any one person)	\$ 10,000	PERSONAL & ADV INJURY	\$ 1,000,000	GENERAL AGGREGATE	\$ 2,000,000	PRODUCTS - COMP/OP AGG	\$ 2,000,000	Deductible	\$ 0		
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B C	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N	N/A	(23) 7175-67-12 7183-29-59	3/1/2022 3/1/2022	3/1/2023 3/1/2023	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center;">X</td> <td style="text-align: center;">PER STATUTE</td> <td style="text-align: center;">OTH-ER</td> <td></td> </tr> <tr><td>E.L. EACH ACCIDENT</td><td></td><td></td><td style="text-align: right;">\$ 1,000,000</td></tr> <tr><td>E.L. DISEASE - EA EMPLOYEE</td><td></td><td></td><td style="text-align: right;">\$ 1,000,000</td></tr> <tr><td>E.L. DISEASE - POLICY LIMIT</td><td></td><td></td><td style="text-align: right;">\$ 1,000,000</td></tr> </table>	X	PER STATUTE	OTH-ER		E.L. EACH ACCIDENT			\$ 1,000,000	E.L. DISEASE - EA EMPLOYEE			\$ 1,000,000	E.L. DISEASE - POLICY LIMIT			\$ 1,000,000
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E.L. DISEASE - POLICY LIMIT			\$ 1,000,000																				

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**  
 Workers Compensation & Employers Liability Coverage consisting of the following programs:  
 7183-29-59 (WC- NY, OR & WI), ACE Fire Underwriters Insurance Company (NAIC#20702), 3/1/2022-3/1/2023  
 (23) 7175-67-12 (WC- All Other States, except monopolistic states of OH, WA, WY, ND - Stop Gap/Employers Liability coverage only.)

<b>CERTIFICATE HOLDER</b>  Evidence of Insurance	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE  
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## Liability Insurance

### Endorsement

**Policy Period** MARCH 01, 2022 TO MARCH 01, 2023  
**Effective Date** MARCH 01, 2022  
**Policy Number** 3605-39-43 NBO  
**Insured** Alliant Holdings, L.P.  
  
**Name of Company** FEDERAL INSURANCE COMPANY  
**Date Issued** MARCH 01, 2022

This Endorsement applies to the following forms:

GENERAL LIABILITY

Under Who Is An Insured, the following provision is added.

### Who Is An Insured

**Owners, Lessees Or Contractors - Ongoing Operations**

A. Persons or organizations shown in the Schedule below are insureds; but they are insureds only with respect to their liability for bodily injury, property damage, advertising injury or personal injury caused, in whole or in part, by:

1. your acts or omissions; or
2. the acts or omissions of those acting on your behalf;

in the performance of your ongoing operations for the person or organization shown in the Schedule at the applicable location described in the Schedule.

However,

- the insurance afforded to such person or organization only applies to the extent permitted by law; and
- if coverage provided to the person or organization is required by a contract or agreement, the insurance afforded to the person or organization will not be broader than that which you are required by such contract or agreement to provide for the person or organization.

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**Liability Endorsement**  
(continued)

- B. However, no person or organization is an insured for bodily injury or property damage occurring after:
1. all work, including materials, parts or equipment furnished in connection with such work, on the project (other than service, maintenance or repairs) to be performed by or on behalf of the person or organization shown in the Schedule at the applicable location described in the Schedule has been completed; or
  2. that portion of your work out of which the injury or damage arises has been put to its intended use by any person or organization other than another contractor or subcontractor engaged in performing operations for a principal as part of the same project.

---

**Schedule**

Designated Owner, Lessee Or Contractor

PERSONS OR ORGANIZATIONS THAT YOU ARE OBLIGATED, PURSUANT TO A CONTRACT OR AGREEMENT, TO PROVIDE WITH SUCH INSURANCE AS IS AFFORDED BY THIS POLICY.

All other terms and conditions remain unchanged.

Authorized Representative



**CHUBB**

**Liability Insurance**

**Endorsement**

**Policy Period** MARCH 01, 2022 TO MARCH 01, 2023  
**Effective Date** MARCH 01, 2022  
**Policy Number** 3605-39-43 NBO  
**Insured** Alliant Holdings, L.P.  
  
**Name of Company** FEDERAL INSURANCE COMPANY  
**Date Issued** MARCH 01, 2022

This Endorsement applies to the following forms:

GENERAL LIABILITY  
EMPLOYEE BENEFITS ERRORS OR OMISSIONS

**Conditions**

Under Conditions, the following provision is added to the condition titled Other Insurance.

**Other Insurance -  
Primary, Noncontributory  
Insurance - Scheduled  
Person Or Organization**

If you are obligated, pursuant to a written contract or agreement, to provide the person or organization described in the Schedule (that is also included in the Who Is An Insured section of this contract) with primary insurance such as is afforded by this policy, then this insurance is primary and we will not seek contribution from insurance available to such person or organization.

**Schedule**

PERSONS OR ORGANIZATIONS THAT YOU ARE OBLIGATED PURSUANT TO A CONTRACT OR AGREEMENT, TO PROVIDE WITH SUCH INSURANCE AS IS AFFORDED BY THIS POLICY.

All other terms and conditions remain unchanged.

Authorized Representative



# Benefits Timeline Tasks (Starting Template) - Will Be Customized for GOAA

## January

Review current plans, policies ect.

Discuss objectives next 12 months

Long-term strategies (3-5 years)

## February

IBNR Analysis

Compliance review

Wellness Program

## March

Stewardship Report

Pre-Renewal Strategy

Financial Dashboard

## April

Develop Renewal Timeline

Renewal Projection

1st Quarter Claims Review

## May

Craft Health and Ancillary RFP

Claim Utilization Review

Network Analysis Report

## June

Benchmark Analysis

WRAP Document Restatement

Stop Loss Negotiation

## July

Mid-Year Service Meeting

Online Portal Updated for OE

2nd Quarter Claims Review

## August

Open enrollment meetings (on-site/webex)

Mid-year Claims Report

Negotiaton & Fianlization of renewal

## September

Audit systems, payroll and billing

Medical cards mailed

Open enrollment meetings

## October

Post-Renewal Review

3rd Quarter Claims Review

SBC's and Benefit Summaries

## November

POP/Sec 125 restatement

Financial Dashboard

Installation of Policies

## December

Year-end projections and review

Year-ahead Projections

Year-end objectives



# Alliant CampaignBuilder™

Making year-round employee communications a breeze



## High-performance cultures don't just happen—they're built

Benefits are a huge investment—and a smart business strategy to attract and retain the best employees. But employees can't appreciate what they don't see. Investing in employee benefit communications shows your employees that you care about what matters most: their health, family, finances, and future.

Studies show that employees who feel valued are more loyal, satisfied, and productive. And employees who are more informed about their benefits have the tools and resources they need to make better choices.

**Through meaningful, customizable, and curated communications, Alliant helps you engage your employees year-round, leading to smarter healthcare decisions and better benefits experiences.**

## Your benefits campaign, made easy

### Open Enrollment is Covered!

Enrollment and compliance requirements are turnkey with our attractive templates, relieving your budget and internal resources from having to build core benefits materials.

CampaignBuilder includes a full complement of digitally-enabled open enrollment resources, including announcements, benefit guides, presentations, compliance notices, and more.

### A Holistic Approach

Supplement open enrollment materials with our educational resources, including explainer guides, videos, and articles tackling topics such as healthcare basics and terminology, HDHP-HSA, FSA, prescription drugs, and more into easily digestible concepts.

### Support a Culture of Wellness

CampaignBuilder also includes a robust well-being library focusing on physical health, mental health, financial security, and common chronic health conditions. With the same customizable, turnkey approach as our benefit materials.

All at no additional cost.

### Far from a one-size-fits-all communication plan

CampaignBuilder's flexible and modular design enables you to layer enhancements on top of core CampaignBuilder materials.

Whether you want to add on decision support tools, tailor-made videos, language translation, or custom design, your Alliant team can facilitate services through our trusted vendor partners.

### A successful benefits strategy starts with a strong foundation

We're more than communications templates. We ensure your employees feel supported through life's biggest decisions by providing powerful communication features, minus the headache. Alliant's

**CampaignBuilder is the cornerstone of your benefits strategy that grows with you, helping you deliver a modern benefits experience that empowers your people at every stage of life and health.**

### Sample CampaignBuilder Materials

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#### Open Enrollment

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- Open Enrollment Kickoff Video
- Open Enrollment Announcement
- Benefits Summary Guide
- Medical Plan Comparison
- Open Enrollment Presentation
- Annual Compliance Notices

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#### Educational

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- Videos and articles
- Newbie Guide to Employer Medical Coverage
- Easy Guide to Understanding Your HDHP/HSA
- Parents-to-Be Benefits Guide

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#### Health Campaigns

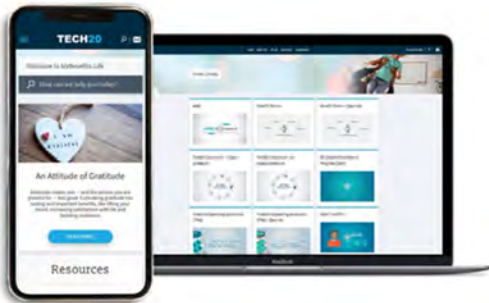
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- Your Guide to Preventive Care
  - 5 Pillars of Wellness
  - Back Pain
  - Cancer
  - Cholesterol
  - Diabetes
  - Heart Disease
  - Hypertension
  - Mental Health
-



# MyBenefits.Life®

Supporting benefits strategy with technology



## MyBenefits.Life® Benefits On-the-Go

**Providing your people and their families a convenient place to interact with their benefits is no longer novel – it's expected.**

With benefits information in the palm of their hand, accessing plan details couldn't be easier.

From updates or changes to benefits, perks or open enrollment, tips for new hires, and more, MyBenefits.Life makes communicating benefits and related HR-information easy to distribute.

### At home or on-the-go, members get immediate access to:

- Information on current benefit offerings
- Plan details, plan summaries, documents, and more
- Provider contacts and web links
- HR announcements and enrollment information
- Educational tools (informative videos, articles, glossary, and more)

MyBenefits.Life is accessible by computer, tablet, or smart phone mobile app (iOS and Android).



*Google Play and the Google Play logo are trademarks of Google LLC. Apple and the Apple logo are trademarks of Apple Inc. App Store is a service mark of Apple Inc.*



# Employee Sample Communications:

## Online Library







# Employee Emotional Health – Actions to Take Now



**The impact of COVID-19 displaced not only day-to-day life but also normal routines, habits, and sense of consistency at both the workplace and at home. It's no surprise that during these unprecedented times, a natural human response is to feel confused, isolated, and scared – which directly affects the state of our mental health. Fortunately, there are strategies and resources available to help you and your employees navigate this extraordinary situation.**

## 1. Maintain Hope and Positivity

Maintaining a sense of hope may be hard for some, but staying positive is within our reach. In an article by [Greater Good Magazine, Are You Getting Enough Positivity in Your Diet](#), Dr. Frederickson a scientist at the Greater Good Science Center at UC Berkeley, has a lot to say about positivity. Research by Dr. Frederickson and Marcel Losada concluded there is a tipping point for positivity to have an impact. That ratio is at least three positive emotions for every negative emotion. When this ratio of three-to-one is used, it can help individuals flourish and be remarkably resilient during hard times. Here are some reminders you can communicate with your employees to help:

- When having a rough day, write down three positive things that happened and see if it helps turn your day around.
- Watch for the good in evening news or social media feeds. Create an internal blog or area

where employees can share positive news such as how their team navigated a difficult situation given the crisis, an encouraging outcome, or similar news.

## 2. Modify Expectations

The pandemic has placed a considerable emotional load on everyone and, frankly, it impacts productivity not to mention having to find new ways to work. Your employees may be struggling with completing daily tasks and staying focused on big projects.

- Have managers help their employees set smaller goals and create shorter task lists in order to be productive.
- Remind your employees that it's okay and to take some time to adopt the new normal and develop daily habits to produce the results needed.

## 3. Address Stress Daily

While remote environments are likely getting a bit stale for your employees and maybe for you as well, emotions are varied and can change dramatically from day to day. Don't wait to address the stress employees might be feeling. Consider providing information on mindfulness techniques. These techniques can help your employees feel grounded by actively thinking in the present, and not dwelling on the past or future

according to [Psychologytoday.com](#). Studies have shown that individuals who practice mindfulness exhibit lower stress levels, protection against anxiety and depression, and focus less on negative feelings.

- Check with your vendor partners for articles, helpful apps, and other resources on mindfulness and addressing stress that you can share with your employees.

#### 4. Watch for Signs of Distress

Despite efforts of being proactive and taking steps to address emotions associated with the current pandemic, there may be a time when anguish sets in or more severe feelings of depression and anxiety are present. Remind your management teams of signs to look for. Ensure you are promoting services from your benefits program such as an Employee Assistance Program, Telehealth services, and health and well-being programs that focus on resiliency and emotional support.

#### 5. Follow a Daily Routine

Depending on your organization, you may have had telecommuting employees already. However, for many, telecommuting is a new experience and they may feel disconnected from routine, peer camaraderie, and learning how to juggle the reality of remote work. Our recent article, [Tips for Managing the New Normal of Remote Work](#), offers some great reminders you can leverage.

#### 6. Lead with Compassion and Empathy

With so little we can control, it can be easy to minimize or forget how much we impact others with our words and behaviors. Being compassionate or empathetic during tough times may be challenging because it could be assumed that we are all experiencing this situation the same way and going through the same emotions. The fact is that couldn't be further from the truth. It's

going to require a balance of compassion and empathy when dealing with the emotions of others as well as our own.

- Remind employees at all levels that being mindful, kind, and patient is important
- Instill an attitude of gratitude in your workforce
- Encourage thoughtful gestures such as thank you notes among employees

#### 7. Cultivate Meaningful Connections

Connecting to others and building or maintaining meaningful relationships is core to who we are as humans. Encourage employees to connect with fellow employees to see how they are doing, how they are navigating challenges they may be experiencing, and build that team bond. In fact, they might be surprised at how those check-ins begin to make them feel more connected than before.

As you proceed through the next phase of what's to come with the pandemic for your organization, remind your employees that a call for help is not a sign of weakness. It's okay. This goes for you as well. Many HR professionals are having to make very difficult decisions or give hard news right now. It's important to take care of yourself with these tips as well. There are going to be ups and downs as you and your employees navigate this and what's to come.

We understand that COVID-19 has ushered in an unprecedented new reality with a far-reaching impact on families and businesses. Alliant is here to support you.

*In addition to Employee Benefits, Alliant has services to help protect the rest of your business in response to COVID-19 including property and casualty, workers' compensation, underwriting, surety, and financial products and services. Ask your Alliant representative for more information or visit [alliant.com](#)*

# Ready to transform your organization?



Health, wellbeing, and human performance should be a strategic imperative and core value of your organization. It's critical to maximizing the performance of your business. To make it truly effective,

your workplace wellness program needs to evolve beyond an HR function and move into a full-scale corporate initiative. It must be much more than just hiring a wellness vendor. That's merely one component of many that makes up a successful corporate wellness strategy. Sound intimidating? It doesn't have to be.

Alliant's Health & Productivity Practice helps you transform your wellness program from employee wellness to corporate wellness. In the end, it's all about your culture. Wellness must be ingrained into your business, and its objectives, to be successful. Your approach needs to be based on your strategy, your culture, your population data, your systems — all of those things that are unique to your organization. It needs to drive accountability, social support, and ease to make a healthy choice. Of course, you also need it backed by real, tangible results such as claims costs that outperform trends.

**Many employers believe that offering flu shots or biometrics screenings create a wellness program. But, here's the disconnect. It takes nine comprehensive elements to create a true workplace wellness program. In reality, only 13% of employers include them.**

Alliant's Health & Productivity Practice, comprised of experienced clinicians and wellness consultants, is a valuable resource and provides:

- Consulting on programs, initiatives, strategies, incentives and more
- Measuring and benchmarking data
- Analyzing short- and long-term results
- Evaluating and evolving ongoing strategy
- Designing and implementing programs and initiatives
- Creating communication and engagement plans for all levels of staff

...

***Ask your Alliant representative what our Health & Productivity Practice can do for you.***

**Creative. Experienced. Engaged. Responsive. That's the Alliant difference.**



# Alliant Benefit Advocates

Driving engagement when it matters most

## When they've got questions, we've got answers

Benefits are one of the best perks you can offer your workforce, but with the complexity of employee benefits comes a lack of confidence in navigating them. Your employees face many questions, but do they have a way to get the answers they need?

With Alliant Benefit Advocates, they do.

## Outsource to the experts

Our Advocates are ready to help educate your people on the ins and outs of their plans, answering the hard questions so that your employees understand and get the most from all their benefit plans.

## An integrated experience with optimized expertise

We work diligently to ensure we feel like an extension of your HR team. Alliant's Advocates are highly trained professionals with extensive benefits and insurance experience. We know the details of your plans and maintain relationships with your carriers, so we resolve your employees' issues quickly and efficiently and ensure they remain productive, focused, and vested.

## Single point of contact, multilingual response

Alliant Advocates are available via email or phone. We work with an interpretation service that support 125 different languages, providing the following assistance to your employees:

- Benefit-related questions\*
- Claims questions
- Prescription issues
- Enrollment and eligibility information
- FSA questions
- COBRA-related issues
- Medicare questions

*\*Benefit advocates cannot answer questions on Workers' Compensation claims or Medicaid.*

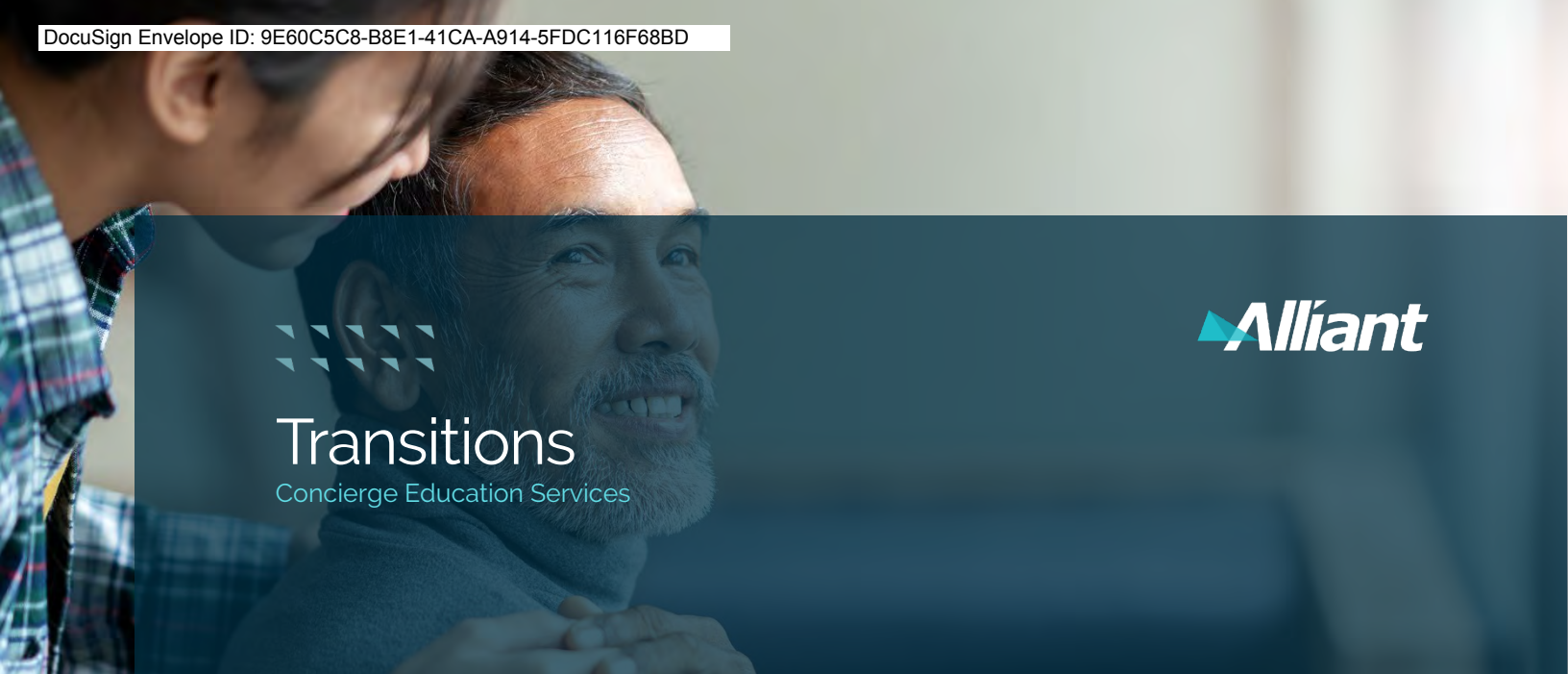
Our Advocates work in a system that is fully compliant and actively monitored to ensure information is secure and confidential. In addition, our online platform gives us the ability to track and identify trends across your organization, including claims problems with specific carriers, higher volume issues, and utilization reporting and benchmarking.

## We're not your call center—we're your benefits resource

We help to empower your people by being a true partner, connecting them to the information they need, when they need it.







# Transitions

Concierge Education Services

## Every life includes transitions

Whether your employees are approaching the milestone of Medicare eligibility or retirement, caring for a family member and managing their healthcare needs, or making a career change that impacts their access to benefits, each event can be overwhelming, difficult, and confusing for individuals and their families.

### Why? Because organizations aren't talking about *transitions*.

This lack of transition-talk is leaving behind a void in workforce planning. Transitions feel like an abnormal disruption, but in fact are a predictable and integral part of life. Employees who are anxious about a personal situation are less engaged and apt to be less satisfied at work. Helping workers through critical healthcare decision points is a win-win for both employees and HR.

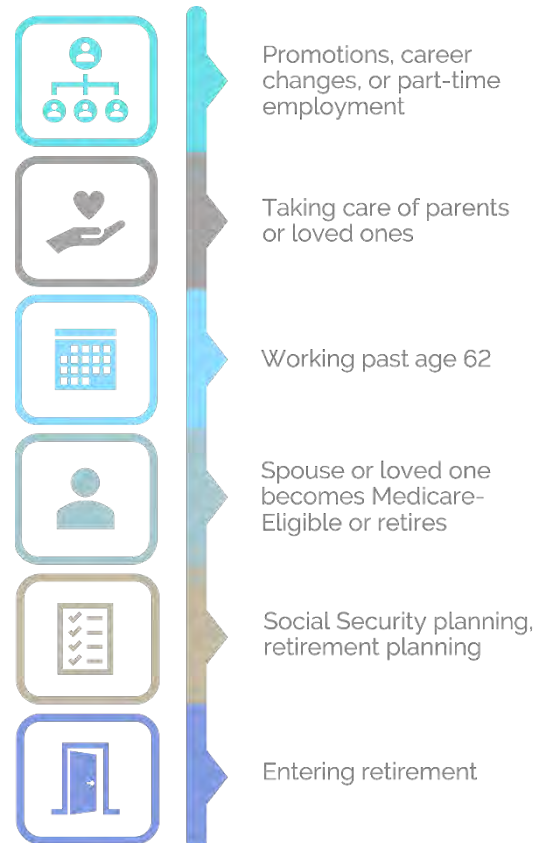
### Help your employees plan for success

Alliant offers concierge education and enrollment services from Transitions Benefit Group to address individual needs. With a proactive, holistic approach to education, we ensure you are providing your workforce the power to help themselves.

More than just a call center, our experienced concierge specialists are dedicated partners, providing tools and expert

guidance to your employees, their spouses, and families. With the right information, they can make more informed healthcare decisions, while often saving thousands of dollars on costs for premiums, services, and prescription drugs.

### Key touchpoints



### No two employee populations are alike—neither are our strategies

*When it comes to your aging employees, we deliver transition strategies that look like this:*

- “White glove” support through dedicated advisor and concierge access to telephone/online enrollment support for pre-65 and post-65 employees and retirees
- Social Security planning, retirement readiness, enrollment, disability support, and coordination of Medicare benefits

*We also provide educational support in the following areas:*

- Comprehensive off-boarding and benefit continuity support, including sourcing COBRA alternatives as needed
- On-demand education, webinars, counseling, and PA support
- Caregiver assistance program to support loved ones with necessary resources
- Proactive outreach to employees to educate, prevent improper enrollments, and coordinate benefits

*Your company will feel supported, too, because we offer:*

- ERISA-compliant solutions and benefit design consultation to reduce liability
- ROI savings model based on real employer and employee cost savings
- Additional auditing services to recover Medicare Secondary Payor dollars, HDHP HSA compliance, and overall compliance process auditing

### HR can breathe easy

Transitions alleviates many concerns for your HR team. Redirecting questions about Medicare, Social Security and retirement to Transitions' experts reduces liability for the employer. In addition, the Transitions team can uncover potential risks in current processes; ensure compliance with ERISA/DOL/CMS/IRS regulations; and provide additional services to recover Medicare Secondary Payor dollars.

By ensuring employees have an advocate to help them make the best decision for their personal situation, overall healthcare cost reductions for the company are often an inherent outcome when Medicare is a better individual choice than employer coverage.

### Drive better outcomes across the board

Every individual's transition is unique, but each individual decision affects the dynamic of your workforce.

Transitions gives your employees and their family members premier support to make better informed healthcare and retirement-related decisions; reduces healthcare costs for your organization; and gives HR the peace of mind of a transparent and compliant solution.

*Transitions Benefit Group is owned by Alliant Insurance Services.*

# Who is your PBM really looking after?



**Pharmacy benefit managers (PBMs) are supposed to keep the costs of prescription drugs in check.** They act as third party administrators between drug makers and buyers (employer health plans).

**But since drug prices continue to spiral out of control, PBMs are clearly not effective at managing costs.** This could have something to do with an inherent conflict of interest.



**Drug companies typically pay rebates to PBMs in order to steer business toward their particular products.** This means your healthcare benefits package may not be receiving the best prices.

**Even the biggest insurance companies aren't sure whether their negotiated drug prices are reasonable.** And while PBMs claim full transparency, they conveniently fail to disclose the full amount they pocket from rebates.



Just how much don't you know about your organization's PBM arrangement?  
Talk to your Alliant representative today.

**Creative. Experienced. Engaged. Responsive.**  
That's the Alliant difference.



[alliantbenefits.com](http://alliantbenefits.com)

# Compliance

Practical, Responsive Benefits

**Alliant**

Knowing the rules is only half the battle. Understanding how those rules affect your employees, benefit plans, and business operations is what makes a world of difference. Alliant's team of experienced on-staff attorneys get to know you and your organization to understand your unique challenges and deliver proactive benefits compliance oversight including:

- Timely **compliance alerts and updates** provide an analysis of any new guidance and clear employer action items.
- A **weekly compliance newsletter** reviews what's happening in the world of benefits compliance and includes answers to common questions, reminders of upcoming deadlines, and more.
- **Quarterly webinars with HRCI and SHRM credits\*** address topics of interest, new and changing laws, and areas where employers need to stay informed.
- A monthly **Compliant with Alliant podcast** focuses on hot compliance topics in an approachable, conversational way.
- More than 50 Alliant Insights, **single subject whitepapers**, provide a detailed analysis of complicated subjects where depth of knowledge is critical to compliance.



- **Charts and tools** walk you through complex compliance concerns and help you achieve clear results.

Because there are no extra costs (or billing) for our core services, you get the tailored support you need to reduce your risk while saving on the expense of outside counsel.

**Ask your Alliant representative what our Compliance Department can do for you.**

\* Professional development credits for HR Certification Institute, SHRM-CP® and SHRM-SCP® available

**Alliant**





# Alliant Employer Technology Consulting



# Strategic business needs and people are your focus. HR technology is ours.

## Optimizing employers' HR technology infrastructure, processes, and support

Between HR, benefits and payroll solutions, most employers support from two to six systems. Systems that don't fit a company's needs or struggle to integrate with each other become a source of frustration for both the teams that own them and the employees that must use them. Easy to use and correctly configured technology is key to ensuring the HR ecosystem works seamlessly. Effective technology solutions allow HR teams to focus on an organization's strategic objectives, and Alliant's Employer Technology Consulting team can help get you there.

## The Alliant HR Tech Advantage

- ▶ **HR Technology Consultants**  
with commanding knowledge of human resources, its complexities, and supporting technology.
- ▶ **Tenure and Bench Strength**  
involving subject matter experts who average 20+ years' experience working with HR technology.
- ▶ **Familiar but Agnostic**  
our consultants are well-versed in a wide variety of HR technologies, but solely aligned to your interests as an employer.
- ▶ **Comprehensive End-to-End Solution**  
that guides you in the selection, implementation, refinement, and management of software systems and streamlined processes.

## Areas of Expertise

### HCM and Benefit Technology Consulting Services

You'll gain the benefit of our expansive knowledge in HR, payroll, benefits, workforce management, and all other aspects of HR solutions and Human Capital Management (HCM) technology.

### Advisory Services

Innovative organizational models, processes, and technologies drive lasting value by helping you deliver effective, efficient solutions across your organization.

- ▶ **Diagnostic Review**

A completely vendor-neutral review of your company's HR contracts, systems, and processes. From that we deliver a set of recommendations to help your organization reposition itself and make necessary changes to either take full advantage of your current HCM system's capabilities or propose seeking a new solution.

- ▶ **Vendor Selection Services**

It can be challenging to know which technology to invest in. This service provides you with a compelling business case, a head-start on your requirements definition, and comparisons of vendors and products that meet your needs. You get actionable best practice recommendations to help you maximize your technology investment using a rigorous and proven selection process.

- ▶ **Optimization Services**

From assessing enterprise needs and priorities to identifying and closing gaps in processes and technology, these services help you optimize the functionality of your existing solutions.

### Additional Services

Our team works right alongside your subject matter experts to audit, streamline, and integrate your data and processes, more accurately and at less cost.

- ▶ **Billing Reconciliation**

Reconciliation and payment of carrier invoices is often workforce-driven. Alliant Employer Technology Consulting not only helps you automate this process, but helps you identify and correct potentially costly errors.

- ▶ **Compliance and Audit Support**

Internal and external security controls, risk mitigation processes, segregation of duties, business process flows, and disaster recovery plans from your vendors provide reinforcements to help your organization satisfy compliance rules. With audit support, you'll improve your data quality by maximizing integrity, getting rid of or reducing the data you don't need, while improving integration, reporting, and analytics.

- ▶ **Data Exchange**

Avoiding manual entry whenever possible is critical. Alliant Employer Tech Consulting helps your systems work collaboratively to send and receive carrier feeds, third-party files, and more.

- ▶ **Staff Augmentation**

Alliant is ready to step in when you need experienced staff to help resolve nagging issues or prepare for annual enrollment. And if you need to project manage an implementation or integration, streamline and automate processes, or manage any HR-related project, Alliant is available to help.

## About Alliant Insurance Services

Alliant Insurance Services is one of the nation's leading and fastest growing distributors of diversified insurance products and services. In the face of increasing complexity, our approach is simple: bring on the best people and invest more deeply in the industries and clients we serve. We operate through a network of specialized national platforms and regional offices to offer a comprehensive portfolio of services to our clients. Our goal is to ensure that they get the most innovative products—and innovative thinking—in the industry.

[alliant.com](https://alliant.com)





Employee Benefits



# PlanIQ™

Powered by Johns Hopkins University ACG® System

Uncover your decision-making potential with future-proof data.





## The holistic view of employee health starts with reliable metrics.

Business conditions evolve, and so do your people. From health and lifestyle patterns to the impact those factors have on the overall wellbeing of your employee population, the risks are always changing. Some risks are easily predicted, while others remain unseen— leaving your company's claims exposure and financial forecast out of focus. Until now.

The power of PlanIQ™ is the ability to combine medical data with a bird's eye view of the external factors that influence employees' health, allowing you to make informed decisions about your benefits plan and financial future in real time.

**Before you make your next benefits decision, there's one thing you should know:**

**Everything.**

Maximize your strategic benefits planning with PlanIQ™, the only population health data tool powered by the combination of the Johns Hopkins Adjusted Clinical Groups (ACG®) System and Alliant Health Score, including Social Determinants of Health and Geographic Determinants of Risk.

### **Out-of-the-box is our happy place.**

Cookie-cutter risk analytics are out. Alliant Health Score is in!

PlanIQ™ is an analytics database we've coupled with a unique, population health scoring model called Alliant Health Score, allowing dynamic utilization of your organization's specific population data across many areas of risk. This detailed reporting package delivers the health answers you need and highlights current trends amongst your employees with as few as six simple population identifiers you already have on file. Get the solutions you need to more effectively invest in the benefit solutions that will have the biggest impact on your employees.

With minimal up-front data collection, Health Score metrics identify opportunities and risks associated with geographical exposures such as limited access to transportation, quality healthcare, and healthy food. Health Score also highlights how behaviors and overall health can be affected by age, race, and socio-economic factors including education, social connectedness, and economic stability.

### **It's more than data—it's your future.**

Big data isn't just for insurance carriers anymore, and relying on the marketplace to adequately rate your risk is a thing of the past. Harness the power of your own data and limit the risks that influence your current premium and renewal rates. Get the transparency and health plan insights you deserve so you can better protect your people and your bottom line.

*Discover how PlanIQ™ intelligence and Health Score data analytics benefit employers like you.*



## Is Creative Agility important to you? It should be.

At Alliant, we celebrate the collective intelligence of our people. We are constantly learning and growing with the industry, enabling us to challenge the status quo on how we deliver our products, services and experiences to our partners. We call this mindset *creative agility*. It means that we are not only striving to find solutions today, but we're already looking ahead to solve tomorrow's challenges.

[alliant.com](https://alliant.com)

# Current Plans & Renewal

## Monthly Premium and Contributions - 2023 Rates

		Current Premium Sharing							Suggested Contribution with Wellness Incentive				
	Number of Employees	Total Premium Per Employee	Employer Contribution	Employer Percentage	Employee Contribution	Employee Percentage			Total Premium Per Employee	Employer Contribution	Employer Percentage	Employee Contribution	Employee Percentage
<b>CH+In HMO</b>													
Employee	395	\$1,200.00	\$1,081.84	90.15%	\$118.16	9.85%			\$1,325.00	\$1,205.00	90.94%	\$120.00	9.06%
Employee + Spouse	107	\$2,400.00	\$1,957.65	81.57%	\$442.35	18.43%			\$2,458.00	\$2,015.65	82.00%	\$442.35	18.00%
Employee + Child(ren)	74	\$2,200.00	\$1,788.46	81.29%	\$411.54	18.71%			\$2,300.00	\$1,888.46	82.11%	\$411.54	17.89%
Employee + Family	140	\$3,400.00	\$2,760.95	81.20%	\$639.05	18.80%			\$3,500.00	\$2,860.95	81.74%	\$639.05	18.26%
Annual Totals	716	\$16,435,200	\$13,868,093		\$2,567,107				\$17,358,972	\$14,783,143		\$2,575,829	
Percentage of Premium			84.38%		15.62%				85.16%		14.84%		
<b>CH+ POS</b>													
Employee	30	\$1,200.00	\$1,029.29	85.77%	\$170.71	14.23%			\$1,288.00	\$1,128.00	87.58%	\$160.00	12.42%
Employee + Spouse	14	\$2,250.00	\$1,717.40	76.33%	\$532.60	23.67%			\$2,390.00	\$1,857.40	77.72%	\$532.60	22.28%
Employee + Child(ren)	4	\$2,200.00	\$1,704.51	77.48%	\$495.49	22.52%			\$2,225.00	\$1,729.51	77.73%	\$495.49	22.27%
Employee + Family	10	\$3,300.00	\$2,830.60	85.78%	\$469.40	14.22%			\$3,445.00	\$2,975.60	86.37%	\$469.40	13.63%
Annual Totals	58	\$1,311,600	\$1,080,556		\$231,044				\$1,385,400	\$1,158,212		\$227,188	
Percentage of Premium			82.38%		17.62%				83.60%		16.40%		
<b>HDHP/HSA</b>													
Employee	21	\$1,100.00	\$1,050.00	95.45%	\$50.00	4.55%			\$1,100.00	\$1,050.00	95.45%	\$50.00	4.55%
Employee + Spouse	2	\$2,000.00	\$1,618.25	80.91%	\$381.75	19.09%			\$2,050.00	\$1,770.23	86.35%	\$279.77	13.65%
Employee + Child(ren)	1	\$1,900.00	\$1,544.82	81.31%	\$355.18	18.69%			\$1,900.00	\$1,646.80	86.67%	\$253.20	13.33%
Employee + Family	6	\$3,000.00	\$2,448.54	81.62%	\$551.46	18.38%			\$3,000.00	\$2,550.52	85.02%	\$449.48	14.98%
Annual Totals	30	\$564,000	\$498,271		\$65,729				\$565,200	\$510,485		\$54,715	
Percentage of Premium			88.35%		11.65%				90.32%		9.68%		
<b>All Plan Monthly Totals</b>	<b>804</b>	<b>\$1,525,900</b>	<b>\$1,287,243</b>		<b>\$238,657</b>				<b>\$1,609,131</b>	<b>\$1,370,987</b>		<b>\$238,144</b>	
<b>All Plan Annual Totals</b>		<b>\$18,310,800</b>	<b>\$15,446,919</b>		<b>\$2,863,881</b>				<b>\$19,309,572</b>	<b>\$16,451,839</b>		<b>\$2,857,733</b>	
<b>Total Percentage of Premium</b>			<b>84.36%</b>		<b>15.64%</b>				<b>85.20%</b>		<b>14.80%</b>		

Total Change  
Total Percent Change

\$998,772  
5.45%  
  
\$2,001

Note:  
1/3 on Employee Only 0.34% \$1,897.89  
1/3 on Family 0.68%



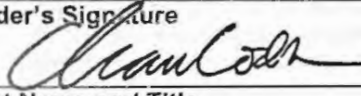

**1. Proposer's Certification Form**

I have carefully examined the Solicitation and any other documents accompanying or made a part of this Solicitations.

I hereby propose to furnish the goods or services specified in this Solicitation at the prices or rates quoted in my submittal. I agree that my submittal will remain firm for a period of up ninety (90) days in order to allow the Aviation Authority adequate time to evaluate the submittals.

I certify that all information contained in this Solicitation is truthful to the best of my knowledge and belief. I further certify that I am duly authorized to submit this Solicitation on behalf of the Proposer as its act and deed and that the Proposer is ready, willing and able to perform if awarded the Contract.

I certify, under oath, that this Solicitation is made without prior understanding, agreement, connection, discussion, or collusion with any other person, firm or corporation submitting a Solicitation for the same product or service. I further certify that no officer, employee or agent of the Aviation Authority or any other Proposer has a financial interest in this Solicitation. I further certify that the undersigned executed this Proposer's Certification with full knowledge and understanding of the matters therein contained and was duly authorized to do so.

<b>Company</b> Alliant Insurance Services, Inc.	<b>Sworn to and subscribed before me by means of:</b>
	<input type="checkbox"/> physical presence or <input checked="" type="checkbox"/> online notarization
<b>Bidder's Signature</b> 	this <u>12th</u> day of <u>October</u> 2022
<b>Print Name and Title</b> Charles Cook	by <u>Charles Cook</u> who is
	<input checked="" type="checkbox"/> Personally Known; or <input type="checkbox"/> Produced Identification. Type of identification produced:
<b>Address:</b> 271 N Pennsylvania Ave, Suite 5 Winter Park, FL 32789	[Check applicable box to satisfy identification requirement of FLA. Stat. §117.05)
<b>Date</b> 10/12/2022	(STATE OF FLORIDA Seal
<b>Duns Number</b> 07-335-7766	
	COUNTY OF <u>Orange</u>
<b>Federal Tax Id Number</b> 33-0785439	<b>Notary Public My Commission Expires:</b> 7/16/26
<b>Email:</b> charles.cook@alliant.com	Rhonda Haydak Printed, typed or stamped commissioned name of Notary Public)

**The Aviation Authority only requires Company Federal Tax Id numbers. The Aviation Authority is not requesting individual social security numbers.**

## 2. Proposal Schedule of Fees

Each Proposer shall submit its fixed fee for providing the Transition Plan services for the period from January 1, 2023 through March 31, 2023:

<b>Transition Plan</b>	\$ <u>0.00</u>
------------------------	----------------

### Annual Fixed Fees

Each Proposer must provide a Fixed Annual Fee for services as specified per Section 2.0 Scope of Services, including but not limited to labor, travel, materials and overhead cost for providing Benefit Consulting Services. Out-of-pocket expenses incurred by Proposer will not be separately reimbursed.

DESCRIPTION	YEAR 1 FIXED FEE (04/01/2023 – 03/31/2024)	YEAR 2 FIXED FEE (04/01/2024 – 03/31/2025)	YEAR 3 FIXED FEE (04/01/2025 – 03/31/2026)	YEAR 4 FIXED FEE (04/01/2026 – 03/31/2027)
Scope of Services	\$ <u>89,815</u>	\$ <u>89,815</u>	\$ <u>94,306</u>	\$ <u>94,306</u>


### Additional Services

Each Proposer shall provide its Hourly Rates for Additional Services as described in Section 2.2 that are not provided for in the Scope of Services, to be performed by the Engagement Team. These Additional Services shall be requested by and approved in advance in writing by the Aviation Authority.

TITLE OF ENGAGEMENT TEAM MEMBER	HOURLY RATE
Consultant	\$ <u>375.00</u> per hour
Account Exec/Mgr	\$ <u>250.00</u> per hour

Alliant Insurance Services, Inc.

Company Name

By: 

Its: Charles Cook, Executive Vice President 10-16-22  
Name & Title, Typed or Printed

**3. Addendum Receipt Verification**

Proposers must acknowledge each addenda on this form and include with your submittal. Failure to acknowledge and include each addenda may result in a non-responsive Proposal. The undersigned acknowledges receipt of the following addenda to the Documents (Give number and date of each):

Addendum No. \_\_\_\_\_ Dated \_\_\_\_\_

Addendum No. \_\_\_\_\_ Dated \_\_\_\_\_

Addendum No. \_\_\_\_\_ Dated \_\_\_\_\_

Addendum No. \_\_\_\_\_ Dated \_\_\_\_\_

Alliant Insurance Services, Inc.

\_\_\_\_\_  
Name of Proposer



\_\_\_\_\_  
Authorized Signature

Charles Cook

\_\_\_\_\_  
Name (Typed or Printed)

Executive Vice President

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

**4. Certification Regarding Prohibition against Contracting with Scrutinized Companies**

I hereby certify that neither the undersigned entity, nor any of its wholly owned subsidiaries, majority-owned subsidiaries, parent companies, or affiliates of such entities or business associations, that exists for the purpose of making profit have been placed on the Scrutinized Companies that Boycott Israel List created pursuant to s. 215.4725 of the Florida Statutes, or are engaged in a boycott of Israel.

In addition, if this solicitation is for a Contract for goods or services of one million dollars or more, I hereby certify that neither the undersigned entity, nor any of its wholly owned subsidiaries, majority-owned subsidiaries, parent companies, or affiliates of such entities or business associations, that exists for the purpose of making profit are on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, created pursuant to s. 215.473 of the Florida Statutes, or are engaged in business operations in Cuba or Syria as defined in said statute.

I understand and agree that the Aviation Authority may immediately terminate any Contract resulting from this solicitation upon written notice if the undersigned entity (or any of those related entities of Proposer as defined above by Florida law) are found to have submitted a false certification or any of the following occur with respect to the company or a related entity: (i) it has been placed on the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel, or (ii) for any Contract for goods or services of one million dollars or more, it has been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or it is found to have been engaged in business operations in Cuba or Syria.

Alliant Insurance Services, Inc.

\_\_\_\_\_  
Name of Proposer



\_\_\_\_\_  
Authorized Signature

Charles Cook

\_\_\_\_\_  
Name (Typed or Printed)

Executive Vice President

\_\_\_\_\_  
Title

10/14/2022

\_\_\_\_\_  
Date

**5. Conflict of Interest Disclosure Form**

The award of this Contract is subject to the provisions of Chapter 112, Florida Statutes. All Proposers must disclose within their Proposal the name of any officer, director, employee or agent (or their spouse or child) who is also an employee or officer of the Aviation Authority.

By submission of this Proposal, the undersigned certifies, under penalty of perjury, which to the best of their knowledge and belief, have met the Florida Statute.

Comments:

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Acknowledged by:

Alliant Insurance Services, Inc.

Name of Proposer



Authorized Signature

Charles Cook

Name (Typed or Printed)

Executive Vice President

Title

10/14/2022

Date

6. **MWBE FORMS**

**LETTER OF INTENT/AFFIRMATION****Minority/Woman Owned Business Enterprise (MWBE)  
(This page shall be submitted for each MWBE Firm)****Proposer:** Name Alliant Insurance Services, Inc.Address 271 N Pennsylvania Ave, Suite 5City Winter Park State FL Zip 22630**MWBE Firm:** Name American Blueprinting and Supply/American Graphix SolutionsAddress 750 Clay StCity Winter Park State FL Zip 32789**MWBE Contact:** Name: Cathy Whitlock Phone ( 407) 644-5366Email: cwhitlock@agsorlando.com**MWBE Certification Agency:** Orlando Co, FL Expiration Date 12/31/2023  
*Each MWBE Firm shall submit evidence (such as photocopy) of their certification status*

Scope of Work	Quantity	Rates	Total
Design and Printing	1000+	tbd	tbd

Year 1:\$ 15,500Year 2:\$ 15,500Year 3:\$ 16,500Year 4:\$ 16,500Year 5:\$ pending extensionYear 6:\$ pending extensionYear 7:\$ pending extensionTotal Term Value: \$ 64,000 Percent of Total Proposal: 17.38 %**AFFIRMATION:**

The above-named MWBE Firm affirms that it will perform the portion of the Contract as describe above for the estimated dollar value as stated above.

**By:** \_\_\_\_\_  
(MWBE Owner's Signature) (Title) (Date)

The Proposer affirms it is committed to utilizing the above named MWBE Firm for the portion of the Contract as described above for the estimated dollar value as stated above.

**By:** Charles Cook Charles Cook, Executive Vice President 10/16/2022  
(Proposer's Authorized Signature) (Title) (Date)**In the event the Proposer does not receive award of the prime Contract, any and all representations in this Letter of Intent/Affirmation shall be null and void.**

**MONTH ENDING:** \_\_\_\_\_

**GREATER ORLANDO AVIATION AUTHORITY**

**MWBE DISBURSEMENT FORM**

(To Be Submitted with EACH Invoice and Faxed to (407) 825-3004 or E-Mailed to [DForms@goaa.org](mailto:DForms@goaa.org))

**CONTRACT:** \_\_\_\_\_

(Number and Name)

<b>PAYMENTS</b>	Current Year			Previous Years Totals
	(A)	(B)	(C)	(D)
	Current Payment	Previous Payments	Cumulative Payments	Amount
Prime Contractor Payment				
Percent Achieved				
	(Total Col E / Total Col A)	(Total Col F / Total Col B)	(Total Col G / Total Col C)	(Total Col H / Total Col D)

<b>MWBE SUBCONTRACTOR/VENDOR</b>	Current Year			Previous Years Totals
	(E)	(F)	(G)	(H)
	Current Payment	Previous Payments	Cumulative Payments	Amount
<b>TOTALS</b>				

**Summary**

Original Prime Contract Total:	\$	Original Sub Contract Total:	\$
Amendment(s) Approved:	\$	Amendment(s) Approved:	\$
Revised Prime Contract Total:	\$	Revised Sub Contract Total:	\$

**Contract Goal:** \_\_\_\_\_

**Cumulative Goal Achieved:** \_\_\_\_\_  
(Sum of totals G and H / Sum of totals C and D)

**Remarks:**  
 \_\_\_\_\_  
 \_\_\_\_\_



# Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

Alliant Insurance Services, Inc.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

Individual/sole proprietor or single-member LLC

C Corporation

S Corporation

Partnership

Trust/estate

Limited liability company. Enter the tax classification (Co-C corporation, SCo-S corporation, P-Partnership) ▶

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

Other (see instructions) ▶

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) 5

Exemption from FATCA reporting code (if any) N/A

Applies to accounts maintained outside the U.S.

5 Address (number, street, and apt. or suite no.) See instructions.

701 B Street, 4th floor

6 City, state, and ZIP code

San Diego, CA 92101

Requester's name and address (optional)

7 List account number(s) here (optional)

Print or type. See specific instructions on page 3.

## Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social Security number									
			-			-			

or

Employer identification number									
3	3	-	0	7	8	5	4	3	9

## Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the verification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here

Signature of U.S. person ▶

*Nancy J. [Signature]*

Date ▶ 1.3.22

## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

## Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien); to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.

**8. E-Verification Certification Form**

Effective January 1, 2021, public and private employers, contractors and subcontractors will be required to register with, and use the Employment Eligibility Verification System (E-Verify) to verify the work authorization status of all newly hired employees. The E-Verify system can be obtained at the U.S. Department of Homeland Security website: <http://www/dhs.gov/E-Verify>.

**"Contractor"** means a person or entity that has entered or is attempting to enter into a contract with a public employer to provide labor, supplies, or services to such employer in exchange for salary, wages, or other remuneration (also referred to as Bidder, Vendor or Contractor).

**"Subcontractor"** means a person or entity that provides labor, supplies, or services to or for a contractor or another subcontractor in exchange for salary, wages, or other remuneration (also referred to as Sub-Vendor or Sub-Contractor).

Vendor/Contractor/Subcontractor acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of:

- All persons employed by Vendor/Contractor/Sub-Contractor during the term of the contract, (including assigned sub-vendors/sub-contractors/sub-contractors), to perform employment duties within Florida and any work in pursuant to the contract with the Aviation Authority.

*By entering into a contract with the Aviation Authority, the Contractor/Contractor becomes obligated to comply with the provisions of Section 2. Section 448.095, Fla. Stat., "Employment Eligibility," as amended from time to time. This includes, but is not limited to, utilization of the E-Verify System to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien.*

**The contractor shall maintain a copy of such affidavit for the duration of the contract. Failure to comply will lead to termination of resulting contract, or if a subcontractor knowingly violates the statute, the subcontract must be terminated immediately. Any challenge to termination under this provision must be filed in the Circuit Court of Orange County, Florida no later than 20 calendar days after the date of termination. If the resulting contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of 1 year after the date of termination.**

**I hereby acknowledge and agree that use of the U.S. Department of Homeland Security's E-Verify System during the term of the contract is a condition of the resulting contract with the Greater Orlando Aviation Authority.**

Company Name: Alliant Insurance Services, Inc.

Authorized Name: Charles Cook Title: Executive Vice President

Signature: *Charles Cook* Date 10/12/22

.....  
State of Florida

County of Orange

This instrument was acknowledged before me on 10/12/2022 (Date)

Notary Public Signature *Rhonda Haydak*







# GREATER ORLANDO AVIATION AUTHORITY

## REQUEST FOR PROPOSAL (RFP)

### PROFESSIONAL SERVICES

#### 23-115-RFP BENEFITS CONSULTANT SERVICES

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Benefit Consult Services will assist the Aviation Authority in all matters relating to the design, implementation and management of the Aviation Authority's benefit plans.

**DATE OF ISSUE:** **Sunday, September 18, 2022**

**PRE-PROPOSAL MEETING:** **Tuesday, September 27, 2022, 10:00 a.m., EST**

**PRE-PROPOSAL LOCATION:** Purchasing Department  
8652 Casa Verde Road, Building 811, Orlando, FL, 32827 or

via GoToMeeting: <https://global.gotomeeting.com/join/810009973>  
*United States (Toll Free): 1 866 899 4679*      Access Code: **810009973**

**DEADLINE FOR QUESTIONS:** **Tuesday, October 4, 2022, 5:00 p.m., EST**

**DIRECT ALL QUESTIONS & INQUIRES TO:**

**Name:** Janice K. Hughes, CPPB  
**Title:** Senior Purchasing Agent  
**Email:** [Janice.Hughes@goaa.org](mailto:Janice.Hughes@goaa.org)  
**Phone:** (407) 825- 6425

**RFP DUE:** **Tuesday, October 18, 2022, 11:00 a.m., EST**



The Greater Orlando Aviation Authority (GOAA) uses an online solicitation platform powered by Mercell Source to Contract (Mercell) (formerly known as Negometrix USA) to:

- Post and accept submissions for Request For Quotes (RFQ) and Request for Information (RFI).
- Post only for Request for Proposals (RFP), Invitation For Bids (IFB) and Statement of Qualifications (SOQ).

GOAA encourages you to register on the Mercell platform and to add commodity codes to your account so that you will automatically be notified of solicitation opportunities with GOAA that may be of interest to your firm.

### **Register on Mercell**

Registration is a simple and free process that takes only a few minutes. Please click the link below and fill out the registration form. GOAA believes that this online transition will be of benefit to all vendors, greatly reducing the time and cost attributed with printing and shipping multiple copies of solicitation responses. To register with Mercell follow the link:

<https://app.negometrix.com/registration>.

If you already have a Mercell profile, you will not need to register again to participate in GOAA bids.

You can find all current GOAA solicitations at: <https://app.negometrix.com/buyer/5681>

### **Additional Information**

Suppliers can check out the support video in the link below for a full walkthrough of the Mercell USA platform, after registering to submitting your first solicitation:

<https://youtu.be/4mpFfFaPp2M>

### **Need Assistance?**

The Service Desk for the Mercell platform is available from Monday – Friday, 7:00 am – 12:00 pm EST for any assistance you may need. You can check out frequently asked questions on their Support Page, <https://help.negometrix.com/en/support/home>, or find the contact information below:

#### **Mercell Service Desk**

Email: [servicedesk.us@negometrix.com](mailto:servicedesk.us@negometrix.com)

Phone: (724) 888-5294

## 1.0 **GENERAL INFORMATION**

- a. The Aviation Authority is soliciting interested parties to perform benefit consultant services for the Aviation Authority at the Orlando International Airport.
- b. The Agreement period, if an Agreement is awarded following the RFP process, will be for four **(4) years**, with the initial service to commence on or about **April 1, 2023**, and with the Aviation Authority having options to renew the Agreement for three (3) additional periods of one (1) year upon mutual agreement. The agreement between the successful Proposer and the Aviation Authority will be non-exclusive.

## 1.1 **Tentative Schedule**

Release Date	September 18, 2022
Pre-Proposal Meeting	September 27, 2022
Deadline for submission of questions (5:00 p.m. Eastern Time)	October 4, 2022
Release of Addendum, if any	October 11, 2022
Deadline to submit Proposals (by 11:00 a.m. Eastern Time)	October 18, 2022
Concessions/Procurement Committee*	November 14, 2022
Interviews, if necessary*	Week of November 21, 2022
Aviation Authority Board*	December 14, 2023

\*The meetings of the CPC Committee and Aviation Authority Board are public meetings, and meeting schedules are posted every week on the Aviation Authority website.

## 1.2 **Intent and Purpose**

- a. The intent and purpose will be for a Consultant to provide professional employee Benefit Consulting Services to assist the Aviation Authority in all matters relating to the design, implementation and management of the Aviation Authority's benefit plans as detailed in Section 2.0, Scope of Services.
- b. The Aviation Authority intends to select the Proposer that it deems to be responsible and responsive and the most advantageous as a whole, to the Aviation Authority, price and other factors being considered, to perform the required services after considering the evaluation criteria, in its exclusive discretion.

## 1.3 **Solicitation Information**

Solicitation documents may be examined and are available for download from the Aviation Authority's Purchasing Department's website or by visiting GOAA's online solicitation platform powered by Mercell Source-to-Contract (Mercell) at [www.orlandoairports.net/purchasing](http://www.orlandoairports.net/purchasing) or <https://app.negometrix.com/buyer/5681>.

- a. Mercell provides supplier registration services, document fulfillment and other purchasing related services to the Aviation Authority and to suppliers doing business with the Aviation Authority. There is no charge to the Proposer to register and any award resulting from this solicitation will not require any payment by the Proposer to Mercell.
- b. If you received this solicitation document from any source other than Mercell, please promptly register your interest in this solicitation with Mercell.

#### **1.4 A Pre-Proposal Meeting**

- a. **A Pre-Proposal Meeting** will be held, **Tuesday, September 27, 2022 @ 10:00 a.m. EST. Proposers may attend in person or may attend via a GoToMeeting: <https://global.gotomeeting.com/join/810009973>; United States (Toll Free): 1 866.899.4679 Access Code: 810009973.** Location is listed on the Cover Page of this solicitation.
- b. If participating in the Pre-Proposal GoToMeeting, participants are respectfully requested to RSVP to [Janice.Hughes@goaa.org](mailto:Janice.Hughes@goaa.org) with their company name and contact information.
- c. The purpose of any Pre-Proposal Conference is to review and discuss the solicitation (and any addenda) as published. Attendance is not mandatory but is highly encouraged. Proposers are expected to be familiar with the Proposal Documents.

#### **1.5 Addenda to Requests for Proposal**

Any response by Aviation Authority to a request by a Proposer for clarification or correction will be made in the form of a written Addendum. All parties who have downloaded the RFP packages will be sent a notification of the issuance of an Addendum by e-mail through Mercell USA. If you received this solicitation document from any source other than Mercell USA, please promptly register your interest in this solicitation with Mercell USA.

#### **1.6 Questions and Clarifications**

- a. Proposers may request additional information or clarification with respect to this RFP, in writing, until **5:00 p.m. Eastern Time on Tuesday, October 4, 2022.** Questions concerning this RFP shall be submitted in writing by e-mail to [Janice.Hughes@goaa.org](mailto:Janice.Hughes@goaa.org). Questions received after the due date and time will not be answered. Questions will be answered via addendum and posted to: <https://app.negometrix.com/buyer/5681>.
- b. The Aviation Authority reserves the right to waive any informalities or irregularities of Proposal, to request clarification of information submitted in any Proposal, to request additional information from any Proposer, or to reject any

or all Proposals, and to re-advertise for RFPs. The Aviation Authority also reserves the right to extend the date and time period during which it will accept Proposals in response to this RFP.

- c. All prospective Proposer(s) shall thoroughly examine and become familiar with the Proposal package, and carefully note the items, which must be submitted with the Proposal as detailed in **Section 4.0, Proposal Submission Requirements**.
- d. Submission of a Proposal shall constitute an acknowledgment that the Proposer has read and understands the Proposal Documents. The failure or neglect of a Proposer to receive or examine any Proposal Document shall in no way relieve it from any obligations under its Proposal or the Contract. No claim for additional compensation will be allowed which is based upon a lack of knowledge or understanding of any of the Contract Documents or the scope of work.

### **1.7 Exceptions to Terms and Conditions within the RFP**

If the Proposer desires to take exception(s) to any portion of the terms and conditions of this RFP, the exception(s) must be taken during the question and answer period, and a response will be included in an Addendum. Exceptions noted within the response submittal may cause the response to be deemed non-responsive.

### **1.8 Public Entities Crimes**

Proposer is directed to the Florida Public Entities Crime Act, Section 287.133, Florida Statutes, as well as Florida Statute 287.135 regarding Scrutinized Companies, and represents to Aviation Authority that Proposer is qualified to transact business with public entities in Florida, and to enter into and fully perform this Agreement subject to the provisions stated therein. Failure to comply with any of the above provisions shall be considered a material breach of the Agreement.

### **1.9 Waiver and/or Rejection of Irregular Request for Proposals**

The Aviation Authority reserves the right to waive informalities or irregularities in any Proposals, to reject any or all Proposals in whole or in part, with or without cause, and to accept that Proposal, if any, which in its judgment is deemed to be responsible and responsive, and in its sole discretion is deemed the most advantageous to the Aviation Authority to perform the required services after considering the evaluation criteria.

### **1.10 Withdrawal of Proposals**

No Proposal may be withdrawn after the scheduled Proposal opening time for a period of ninety (90) days. Any Proposer withdrawing or attempting to withdraw its Proposal prior to the expiration of the 90 day period shall be obligated to reimburse the Aviation Authority for all its costs incurred in connection with such withdrawal or attempted

withdrawal including, without limitation, any increased costs for procuring the goods or services from another Proposer or all costs of advertising and re-procuring the goods or services, and all attorneys' fees, in addition to payment of Aviation Authority's other damages. A Proposer's submission shall be deemed the Proposer's acknowledgment of an agreement to the provisions of this Section.

#### **1.11 Communications; Questions Regarding Specifications or Proposal Process**

- a. All communication and contact regarding this solicitation shall be directed to the Senior Purchasing Agent referenced on the cover page of this solicitation. An appropriate official or employee of the Aviation Authority may initiate communication with a Proposer in order to obtain information or clarification needed to develop a proper and accurate evaluation of the Solicitation.
- b. All communication from a Proposer during the Proposal process should be submitted in writing to the Greater Orlando Aviation Authority, Purchasing Department, 8652 Casa Verde Road, Building 811, Orlando, Florida 32827-4338 or to the email address as directed during the Proposal process. A copy of the Administration Policies (Sections 180.01 and 180.03) are available upon request from the Chief Administrative Officer.
- c. In accordance with the above-referenced policies, any communication directly or indirectly to seek to encourage any specific result in connection with an Aviation Authority selection process, including but not limited to, written communications, any and all forms of electronic communications or messaging, including social media, oral communications either in person or by telephone, initiated by a Proposer or through a lobbyist, agent or third person, to any Aviation Authority staff and/or Committee/Board member who is a member of any committee constituted for the purposes of ranking Solicitations, making recommendations or making an award, is prohibited from the time that the Solicitation is released to the time that the award is made. **Any violation of this provision may result in the disqualification of the offending Proposer's Proposal.**

#### **1.12 Notice of Intent to Award Agreement**

Unless all Proposals are rejected by the Aviation Authority, a Notice of Intent to Award is anticipated to be provided within ninety (90) days from the opening of Proposals to the responsible and responsive Proposer submitting the Proposal deemed to be most advantageous to the Aviation Authority, all factors being considered. For all procurements, the Aviation Authority reserves the right to reject any or all Proposals and to cancel the procurement or to solicit new Proposals.

The Aviation Authority intends, but is not obligated, to enter into a non-exclusive agreement with the highest ranked Proposer to perform the required Services described herein. The Aviation Authority reserves its right to award any or all of the advertised services subject to the availability of funding.



### **1.13 Public Meetings/Public Records**

Please be aware that all meetings of the Aviation Authority's Board are duly noticed public meetings and all documents submitted to the Aviation Authority as a part of or in connection with a Proposal will constitute public records under Florida law regardless of any person's claim that proprietary or trade secret information is contained therein.

### **1.14 Code of Ethics and Business Conduct Policy**

The Aviation Authority has adopted a Code of Ethics and Business Conduct Policy (Section 204.01) which addresses, the obligation of the Aviation Authority's Board members and employees to follow the Florida Statutes in reference to these issues. This includes, but is not limited to, the obligations of the Aviation Authority's Board members and employees with respect to having an interest in business entities, outside employment, gratuities, divulgence of information, unauthorized compensation and acceptance of gifts. Please be aware that any violation of this policy by a Proposer and/or any attempt to influence an Aviation Authority Board member or employee to violate the policy is sufficient cause for the denial of the right of the Proposer to Proposal on any Contract or sell any materials, supplies, equipment, or services to the Aviation Authority for a period of time that is determined by the Chief Executive Officer. A copy of this policy is available upon request from the Chief Administrative Officer.

### **1.15 Florida Public Records Law**

**IF THE CONSULTANT HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONSULTANT'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, PLEASE USE THE LINK TO CONTACT THE AVIATION AUTHORITY'S CUSTODIAN OF PUBLIC RECORDS: <http://orlandoairports.net/publicrecords>; PHONE NUMBER: (407) 825-2400; AND MAILING ADDRESS: GREATER ORLANDO AVIATION AUTHORITY, PUBLIC RECORDS, ONE JEFF FUQUA BOULEVARD, ORLANDO, FL 32827.** A Consultant with an Aviation Authority Agreement for services must comply with Florida Statute, Chapter 119.071, specifically to: Keep and maintain public records that ordinarily and necessarily would be required by the Aviation Authority in order to perform the service. Upon request from the Aviation Authority's custodian of public records, provide the Aviation Authority with a copy of the requested records or allow the access to public records to be inspected or copied within a reasonable time on the same terms and conditions that the Aviation Authority would provide the records and at a cost that does not exceed the cost provided in Chapter 119.07, Florida Statutes, or as otherwise provided by law. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the Agreement term and following completion of the Agreement if the Consultant does not transfer the records to the Aviation Authority. Upon completion of the Agreement, meet all requirements for retaining public records and transfer, at no cost to the Aviation Authority, all public records in possession of the Consultant or keep and maintain public records required by the Aviation Authority to perform the service. If the

Consultant transfers all public records to the Aviation Authority upon completion of the Agreement, the Consultant shall, upon termination of the Agreement, destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Consultant keeps and maintains public records upon completion of the Agreement, the Consultant shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the Aviation Authority, upon request from the Aviation Authority's custodian of public records, in a format that is compatible with the information technology systems of the Aviation Authority. If a Consultant does not comply with a public records request, the Aviation Authority shall enforce the Agreement provisions in accordance with the Agreement.

#### **1.16 Lobbying Statement**

All firms are hereby placed on notice the Aviation Authority Board and staff shall not be contacted about this Proposal. Firms and their agents are hereby placed on notice that they are not to contact members of the Aviation Authority staff and/or Committee/Board member (with the exception of designated Purchasing Liaison). Public meetings and public deliberations of the Selection Committee are the only acceptable forum for the discussion of merits of products/services requested by the Request for Proposal; and written correspondence concerning Proposals may be submitted to the Purchasing Department. An appropriate official or employee of the Aviation Authority may initiate communication with a Proposer in order to obtain information or clarification needed to develop a proper and accurate evaluation of the Solicitation. Any official communication from a Proposer during the Proposal process should be submitted in writing to the Greater Orlando Aviation Authority, Purchasing Office, 8652 Casa Verde Road, Building 811, Orlando, Florida 32827-4338 or to the email address as directed during the Proposal process.

In the event a lobbyist meets with or otherwise communicates with Staff or a Board member at a location other than the Aviation Authority offices, the lobbyist shall file a Notice of Lobbying (Form 4) detailing each instance of lobbying to the Aviation Authority within 7 calendar days of such lobbying. As of January 16, 2013, lobbyists will also provide a notice to the Aviation Authority when meeting with the Mayor of the City of Orlando or the Mayor of Orange County at their offices. The policy, forms, and instructions are available in the Aviation Authority's offices and the website. A copy of the Administration Policies (Sections 180.01 and 180.03) are available upon request from the Chief Administrative Officer. Failure to adhere to these requirements could result in Board action to disqualify your firm from consideration of award.

## **2.0 SCOPE OF SERVICES**

### **2.1 Scope of Services**

The firm selected will be required to advise the Aviation Authority, or its representatives, in matters involving benefit plans. The Services to be performed shall include, but are not limited to, the following:

- a. Provide estimates of renewal rates for benefit plans and services to assist the Authority with forecasting and budgeting.
- b. Assist in the competitive proposal process for the Aviation Authority's benefit plans and related Third Party Administrator (TPA) providers, including proposal development, evaluation, and recommendation.
- c. Solicit and negotiate premiums, renewal rates, service, benefit levels, plan design, special terms and conditions, etc. with carriers and providers for benefit plans in coordination with the Human Resources (HR) Staff. Initiate all contract renewals.
- d. Apprise the Aviation Authority of local and national benefit trends, innovative ideas and recommend new products, designs, programs, and services. Present benchmarks, industry standards, and best practices.
- e. Provide ongoing analysis of plan designs (including retiree coverages), cost containment strategies, available cost sharing alternatives, competitive position, and funding methods, including but not limited to self-funding.
- f. Timely inform the Aviation Authority of changing legislation, regulatory and legal decisions affecting employee benefits. Advise and discuss methods to comply with these changes including any reporting requirements.
- g. Assist with maintaining regulatory compliance as it relates to providing benefit plan coverage for active employees, and retirees [Other Post-Employee Benefits (OPEB)], including advice on data practices, records retention and privacy issues.
- h. Review and monitor contracts, plan documents and policies to ensure accuracy, completeness, and compliance with the law. Monitor claim performance according to any contractual performance standards and recommend the establishment of additional performance standard agreements with carriers/providers where appropriate.
- i. Review and analyze relevant data to ensure the Aviation Authority is receiving optimum service and benefits from all carriers and providers.
- j. Respond promptly and accurately to questions from Aviation Authority representatives.

- k. Provide ongoing assistance with benefit related education for employees and the Aviation Authority's HR Staff.
- l. Assist in developing wellness initiatives for employees to include assisting with coordination of employee health events and wellness measurement tools.
- m. Assist with the creation and implementation of communication materials (pamphlets, brochures, presentations, etc.) for new or changed programs, including Open Enrollment and health event materials. Assist the Aviation Authority's HR Staff with development of employee benefits statements.
- n. Provide open enrollment support to include on-line enrollment, explanation of benefit options and conducting and/or attending enrollment meetings, as needed.
- o. Coordinate employee communication and conduct employee information meetings as new programs are implemented.
- p. Provide consulting advice and cost impact of proposed changes to benefits as requested. Attend the Aviation Authority's Board Meeting(s) (usually September) when Group Health/Benefit Plans are presented for approval. Make presentations to Senior Management and/or Board if required.
- q. Meet with the Aviation Authority staff on a quarterly basis.
- r. Serve as a liaison with carriers and providers when service problems or claims issues occur. Provide support to employees on benefit questions and claim issues.
- s. Conduct benefit surveys as requested and make recommendations based on data.
- t. Review, monitor and make recommendations, when needed, on the efficiency measures for streamlining plan processes.
- u. Arrange for the retention of other professional consultants as may be needed and approved by the Aviation Authority.
- v. Provide such other benefit advice and services to the Aviation Authority as is deemed necessary and approved by the Aviation Authority.
- w. Complete analysis of all funding strategies and potential administrative differences.
- x. Provide guidance through any benefits related transition including, development of an action plan/timeline, drafting and/or review of plan documents and policies, stop loss recommendations/acquisition, draft and/or

review of administrative service agreements and advice regarding all matters concerning compliance and risk mitigation, etc. For self-insured analyses, review and negotiate competitive pharmacy terms and pricing.

**2.2 Additional Services**

If during the Agreement period, Additional Services are needed beyond the Scope of Services stated in Section 2.1, the Consultant may, at the option of the Aviation Authority, be engaged to perform these services based on the Hourly Rates provided in the Consultant's Fee Form submitted with its response. All Additional Services shall be documented by engagement memoranda to be approved by the Aviation Authority by issuing an Amendment to the Agreement.

**2.3 Non-Exclusive Services**

This is a non-exclusive Agreement. During the term of the Agreement, and any extensions thereof, the Aviation Authority reserves the right to contract for another provider for similar services as it determines necessary at its sole discretion.

**The remainder of this page is intentionally blank.**

### **3.0 PROPOSAL REQUIREMENTS**

#### **3.1 Proposer's Mandatory Requirements**

Proposers must meet the following mandatory requirements to be considered for the award of the Agreement.

- a. Proposer must be licensed in **Florida 2-15 Insurance License for Life, Health and Variable Annuity** to perform the scope of work in the State of Florida. Provide a copy of such license to the Aviation Authority with the Proposal submission.
- b. Proposer must have an established business location in the Central Florida area as of the date of Proposer's response to this RFP.
- c. Proposer must be registered/qualified to do business in the State of Florida. Provide a copy of such registration/qualification to the Aviation Authority with the Proposal submission.

#### **3.2 Proposer's Minimum Requirements**

For all Proposers who satisfy the Proposer's Mandatory Requirements in Section 3.1, the following are the evaluation criteria that will be considered in determining which Proposal is most advantageous to the Aviation Authority. Proposers will address each requirement specifically in their Proposal. Each Proposer must acknowledge on company letterhead and provide written documentation that their firm meets the requirements.

- a. Proposer shall submit a complete and responsive proposal, per Section 4.0. Proposal Submittal Requirements.
- b. Proposer shall have a minimum of five (5) years of continuous and recent experience providing services of the type described in the Scope of Services above, prior to the deadline of this RFP. Proposer shall provide an affirmative statement and/or documentary proof of such experience with the Proposal submission.
- c. Proposer must be willing and able to place business with all the Aviation Authority's existing provider/carriers as outlined in Exhibit 1. This is no indication that the Aviation Authority will maintain its existing carriers but this action would be considered if advantageous to the Aviation Authority.
- d. Proposer shall provide an affirmative statement that it is independent of the Aviation Authority.
- e. Proposer shall affirm their willingness to execute an agreement substantially in the form attached as Exhibit 2.

### 3.3 Evaluation of Proposal Award

- a. The evaluation criteria in this Section does not have any specific predetermined relative weight. The consideration of individual criterion is merely a tool to assist the Aviation Authority in determining which Proposal is most advantageous, as a whole, to the Aviation Authority, price and other factors being considered.
- b. The relative advantages of a Proposer's responses with respect to one criterion may outweigh shortcomings of that Proposer's responses in one or more other criterion, depending on the relative disparities in the qualities of the responses in each criterion and the relative importance of certain criteria to each other, as determined in the exclusive discretion of the Aviation Authority.
- c. For all Proposers who satisfy the Proposer's Mandatory Requirements in Section 3.1, the following are the evaluation criteria that will be considered in determining which Proposal is most advantageous to the Aviation Authority:
  - 1) Proposer's demonstrated knowledge and experience providing benefit consulting services as described in Section 2.0, Scope of Services. *Any such services at a large hub airport or large governmental agency should be highlighted.*
  - 2) Qualifications and experience of Proposer's key personnel relative to the Scope of Services described in Section 2.0.
  - 3) Methodology and Approach Plans.
  - 4) Prior or Pending Convictions, Indictments, Investigations, Fines or Regulatory Investigations and Claims Information.
  - 5) Proof of Insurance.
  - 6) Proposer's Schedule of Fees.

### 3.4 Selection Process

- a. Responses to this RFP will be evaluated and ranked by the Concessions/Procurement Services Committee (CPC). The recommendation of the CPC will be considered by the Aviation Authority Board for award.
- b. The CPC Committee shall review the responses to evaluate whether the Proposers meet the mandatory requirements set forth in this RFP and will evaluate the information provided per **Section 4.0, Proposal Submission Requirements**.
- c. The CPC Committee will then thoroughly evaluate the responses and at its discretion, may invite one or more of the Proposers that are the most

advantageous to the Aviation Authority to present/interview with the CPC Committee. The purpose of such an interview, if held, would be to allow Proposers to elaborate upon their Proposal before a recommendation for ranking of the Proposals is made. Interview responses, along with the written Proposal will become part of the Proposer's response to be evaluated by the CPC Committee.

- d. Among the factors that will be considered in selecting the Proposers who may be shortlisted or for ranking purposes include: meeting the requirements, approach to providing the Services, ability to provide the required Services, prior experience on similar projects, past performance with the Aviation Authority (if applicable), past performance with other entities and pricing.
- e. The Aviation Authority reserves the right to solicit from available sources relevant information concerning a Proposer's past performance and may consider such information in its selection of Proposers.
- f. If the CPC Committee decides to shortlist Proposers, the presentations/interviews will be held the week of December 4, 2022. Following presentations/interviews, or in the event CPC Committee determines that presentations/interviews are not necessary, the CPC shall make a final ranking and select in order of preference, in order to make a recommendation to the Aviation Authority's Board, the responsible, responsive, and in its sole discretion, the most advantageous as a whole, to the Aviation Authority, price and other factors being considered , to perform the required services.
- g. **Following the Aviation Authority Board approval of the CPC ranking, the Aviation Authority may approve a Agreement or** enter into negotiations with the top-ranked Proposer, in order to consummate a Agreement on terms that are fair, competitive and reasonable. Should the Aviation Authority be unable to negotiate a satisfactory contract with the top-ranked Proposer, negotiations with that Proposer shall be terminated. The Aviation Authority may undertake negotiations with the second-ranked Proposer, and if necessary, additional Proposers in accordance with the order of ranking.
- h. Upon successful completion of contract negotiations with a Proposer, the Aviation Authority shall have the right, but not the obligation, to award all or any portion of the services. The extent and scope of the Services, along with the fees for such services, will be subject to final approval by the Aviation Authority. The Aviation Authority intends, but is not obligated, to enter into a non-exclusive agreement with the highest ranked Proposer to perform the required Services described herein. The Aviation Authority reserves its right to award any or all of the advertised services subject to the availability of funding.
- i. The Aviation Authority reserves the right to waive any informality in the RFPs, to reject any and all RFPs, and to re-advertise or elect not to proceed with the



services for any reason. All recommendations and decisions regarding award of the services shall be made at open public meetings in accordance with the requirements of Florida Statute 286.011, and all interested parties are invited to attend such meetings. All parties desiring information regarding the award of the Contract may visit <http://Orlandoairports.net> or <https://app.negometrix.com/buyer/5681>.

### **3.5 Independent Consultant Status and Compliance with the Immigration Reform and Control Act**

Proposer is and shall remain an independent Consultant and is neither agent, employee, partner, nor joint venture of Aviation Authority. Proposer acknowledges that it is responsible for complying with the provisions of the Immigration Reform and Control Act of 1986 located at 8 U.S.C. 1324, et seq. and regulations relating thereto, as either may be amended from time to time. Failure to comply with the above provisions shall be considered a material breach of the Agreement.

### **3.6 Insurance Requirements**

At its sole expense, Proposer shall maintain the following insurance during the term of this Contract, including any extensions or renewals and such insurance will apply to Contractor, its employees, agents, and Subcontractors.

#### **a. Commercial General Liability and Automobile Liability.**

- 1) Commercial General Liability insurance covering any and all claims for property damage and bodily injury (including death) and including, but not limited to premises, products and completed operations, and Contractual liability for Contractor's covenants, with a limit of liability not less than **One Million Dollars (\$1,000,000)** per occurrence; and
- 2) Automobile liability insurance covering each motor vehicle, including but not limited to owned, non-owned, or hired, used in conjunction with providing Services on Aviation Authority property resulting in property damage or bodily injury, including death with a limit of not less than **One Million Dollars (\$1,000,000)** combined single limit per accident.
- 3) Additional Insured Endorsement. Such above referenced liability insurance shall name the Aviation Authority and the City of Orlando and their members (including, without limitation, members of the Aviation Authority's Board and the City's Council and members of the citizens' advisory committees of each), officers, employees, and agents as additional insureds.

b. **Workers' Compensation and Employer's Liability.**

The following insurance shall apply to all Contractor's employees who will be engaged on the Aviation Authority property in the performances of Services in this Contract: (i) workers' compensation insurance with statutory limits in accordance with Florida law, and (ii) employer's liability insurance policy limits not be less than \$100,000 for each accident, \$100,000 for disease each employee and \$500,000 for disease policy limit. If the Proposer is self-insured, the Proposer shall provide proof of self-insurance and authorization to self-insure as required by applicable Florida laws and regulations. The Aviation Authority will not accept State of Florida exemptions.

c. **Professional/Errors & Omissions Liability Insurance.**

Insurance covering claims, suits, and damages for losses caused by the acts, errors, or omissions by Proposer with limits not less than **One Million Dollars \$1,000,000** per claim. The nature of the professional services in the scope will determine the specific type of insurance required.

d. **Other Insurance Requirements.** Proposer agrees to the following as it relates to all above required insurance:

- 1) Self-Insured Retention and Deductibles. Proposer's insurance policies shall not be subject to a self-insured retention or deductible exceeding Ten Thousand Dollars (\$10,000), if the value of the Contract is less than \$1,000,000, and not be subject to a self-insured retention or deductible exceeding One Hundred Thousand Dollars (\$100,000), if the Contract is \$1,000,000 or more, unless approved by the Aviation Authority's Chief Executive Officer. The above deductible limits may be exceeded if the Contractor's insurer is required to pay claims from the first dollar at 100% of the claim value without any requirement that Proposer pay the deductible prior to its insurer's payment of the claim.
- 2) Insurance policies shall be primary insurance and not contributory to any other valid insurance the Aviation Authority may possess, and that any other insurance the Aviation Authority does possess shall be considered excess insurance only.
- 3) Insurance shall be carried with an insurance company or companies being currently authorized to conduct insurance business in the State of Florida, and must have no less than a "B+" Financial Rating and a Financial Size Category of "Class VI" or higher according to the most current edition of AM Best Rating and said policies shall be in a form acceptable to the Aviation Authority.

- 4) Any liability insurance maintained by Proposer written on a claims-made form basis will maintain coverage for a period of time determined by the Aviation Authority to be appropriate to cover claims made after the Proposer has concluded its services to the Aviation Authority.
- 5) All insurance required for this Contract shall contain a waiver of subrogation clause, as allowed by law, in favor of the Aviation Authority and the City of Orlando.
- 6) A properly completed and executed Certificate of Insurance on a form provided or approved by the Aviation Authority (such as a current ACORD form) evidencing the insurance coverages required by this Section shall be furnished to the Aviation Authority upon the Notice of Intent to Award of the Contract and each renewal thereafter during the term of this Agreement and its renewal/extension. Proposer acknowledges that any acceptance of Certificate of Insurance by the Aviation Authority does not waive any obligations herein this Agreement.
- 7) The Aviation Authority is currently contracted with a third party for the management of all insurance certificates related to Aviation Authority Contracts. Contractors who enter into a Contract with the Aviation Authority will be contacted directly by the third party vendor for insurance certificates and related matters such as expired certificates. An introductory letter will be sent instructing each Contractor of the proper procedures for processing updated insurance certificates as well as any other insurance related matter that may arise over the term of the Contract. Contractors will respond as directed in the introductory letter as well as any further instructions they may receive.
- 8) The Contractor shall provide the Aviation Authority immediate written notice of any adverse material change to the Contractor's required insurance coverage. For purposes of this Insurance Section, an "adverse material change" shall mean any reduction in the limits of the insurer's liability, any reduction of any insurance coverage, or any increase in the Contractor's self-insured retention and any non-renewal or cancellation of required insurance.
- 9) If any insurance coverage is canceled or reduced, Contractor shall, within forty-eight (48) hours remit to the Aviation Authority a Certificate of Insurance showing that the required insurance has been reinstated or replaced by another insurance company or companies acceptable to the Aviation Authority. If Contractor fails to obtain or have such insurance reinstated, the Aviation Authority may, if it so elects, and without waiving any other remedy it may have against Contractor, immediately terminate this Contract upon written notice to Contractor.

- 10) The Aviation Authority's Chief Executive Officer shall have the right to alter the monetary limits or coverages herein specified from time to time during the term of this Contract, and Contractor shall comply with all reasonable requests of the Chief Executive Officer with respect thereto.

### **3.7 Minority and Women Business Enterprise ("MWBE") Participation Program**

- a. To encourage development and growth of MWBEs, the Aviation Authority has adopted a Non-Federally Funded Minority and Women Business Enterprise ("MWBE") Participation Program, which is available on the Aviation Authority's website <https://orlandoairports.net/airport-business/>.
- b. It is the policy of the Aviation Authority that MWBEs shall have the maximum opportunity to participate in the purchase of goods and services, and the Aviation Authority has established the MWBE Participation Program to implement this policy. This participation can take the form of purchasing Contracts, subcontracts, joint ventures or similar arrangements.
- c. **The Proposal will be considered non-responsive to the Request for Proposal and rejected if the Proposer fails to demonstrate, to the reasonable satisfaction of the Aviation Authority, as required by the MWBE policy, that the Proposer has met or has made a good faith effort to meet the established MWBE goal.**
- d. For this Contract, the Aviation Authority has established a MWBE Participation **Goal of 17%**, which means that **17%** of the total Contract expenditures by the Aviation Authority should be used to purchase goods or services under the Contract from MWBEs. All Proposers, including a Proposer which is an MWBE, shall comply with the MWBE requirements outlined in this Section by having MWBEs other than the Proposer, participate in the performance of the Contract services at a sufficient level to meet the participation goal.
- e. Proposers are required to submit, with their Proposals, the Letter of Intent/Affirmation information by completing the form for each MWBE Firm. Both the MWBEs and the Proposer are required to affirm the information provided by signing the Attached MWBE form prior to submittal. After the Proposals are opened, but prior to award, the Aviation Authority may request, receive, and review additional information from Proposers in order to verify the accuracy of the level of information presented by Proposers with their Proposals and the good faith effort of Proposers to reach the MWBE goal.
- f. After the Proposals are opened and prior to an award of the Contract, the Aviation Authority may request, receive and consider omitted and supplemental information from the Proposers as to the certification of Proposers, if applicable, and of any Proposal Subcontractor, supplier or joint venture in order to determine MWBE status.

- g. The successful Proposer shall enter into subcontract(s)/purchase orders with the MWBE(s) identified in the Proposer's Proposal documents which the Aviation Authority relied upon in awarding this Contract, subject only to the Aviation Authority's right to approve all Subcontractors. The Contractual arrangements with the MWBE(s) shall incorporate such reasonable terms as are required to complete the work described therein while furthering the Aviation Authority's MWBE policy. The successful Proposer must submit copies of the signed subcontract(s)/purchase order(s) to the office of Small Business Development for each MWBE prior to commencement of performance under this Contract. Failure to enter into the subcontract(s)/purchase order(s) with the MWBE(s) identified in the Proposer's Proposal documents or failure to submit copies of the signed subcontract(s)/purchase order(s) may result in loss of the award to Proposer.
- h. A Proposer shall not breach any of its obligations with the MWBE(s). In the event Proposer desires to terminate or replace a MWBE, Proposer shall promptly notify the Aviation Authority of the impending termination, the reason for the termination and obtain the Aviation Authority's approval prior to proceeding with the termination. Following the termination Proposer shall replace the terminated MWBE with another MWBE. If the Proposer is unable to utilize another MWBE for performance of that portion of this Contract, the Proposer shall provide the Aviation Authority with documentation, in a form satisfactory to the Aviation Authority, showing that it is not possible to replace the terminated MWBE with another MWBE. The MWBE percentage for participation must not decrease below the percentage proposed during the term of the Contract.
- i. The successful Proposer shall submit to the Aviation Authority a Disbursement Form with each invoice submitted for payment, indicating the amount of money spent with each MWBE(s) since the previous invoice.
- j. Failure to carry out the requirements set forth herein or the commitments made by the Proposer (e.g. failure to subcontract with and use MWBEs, to pay MWBEs as committed in the Proposal documents, the failure to promptly pay MWBE Subcontractors) shall constitute a breach by the Proposer of this Contract and may result in termination of the Contract by the Aviation Authority or such other remedy as the Aviation Authority deems appropriate. Additionally, Contractor is reminded two or more failures to satisfy the requirements set forth herein or the commitments made by Proposer may result in debarment under the Aviation Authority's Debarment of Contractors Policy 130.04.
- k. A list of currently certified MWBEs may be obtained via the internet at <https://orlandoairports.net/airport-business/>. The Aviation Authority will provide this information as a convenience only, and Proposers shall be solely responsible for ensuring all MWBEs are capable of performing. Certification of eligibility as an MWBE should be completed prior to submission of a Proposal. During the Proposal process, Proposers may contact the Office of Small Business

Development for any questions or information concerning the MWBE Participation Program.

- I. Compliance with the MWBE policy of the Aviation Authority does not relieve Proposers of the equal employment opportunity obligations under Regulations.

**3.8 Good Faith Effort for MWBE Participation Program**

- a. If the Proposer fails to meet the MWBE Participation Goals, the Aviation Authority will require Proposer to submit evidence of good faith efforts within two (2) business days of request; such evidence may include, but is not limited to the following:
  - b. Indicating the name and title of the person responsible for the Proposer's good faith efforts to reach the participation goal;
  - c. Provide evidence of attendance at Pre-Proposal Conference meeting, if any, scheduled by the Aviation Authority to inform MWBE firms of subcontracting opportunities under a given Contract;
  - d. Provide a list of MWBE firms contacted;
  - e. Provide copies of written correspondence to MWBE firms that their Proposal is being solicited, as well as certified return receipts to prove receipt or the reason for non-delivery;
  - f. Provide evidence of information provided to the MWBE firms about the specific work the Contractor intends to subcontract;
  - g. Provide evidence of information provided to MWBE firms on bonding and insurance requirements;
  - h. Provide copies of advertisements in general circulation media, trade association publications, and minority focus media advertising for MWBE firms interested in subcontracting;
  - i. Provide evidence that Proposer provided interested MWBE firms with assistance in reviewing the Contract plans, specifications, and the terms and conditions of the general Contract, subcontract and addenda;
  - j. Providing evidence that the Proposer provided MWBE firms prompt notice of addenda affecting specific trade Contractors;
  - k. Provide evidence that Proposer made follow-up inquiries after initial solicitations of interest from MWBE firms. Proposer shall maintain documentation of the date,

time, and name of individuals contacted. A telephone log is acceptable documentation of this activity;

- l. Provide a list of quotes submitted by MWBE firms;
- m. Provide documentation as to why MWBE firms were not utilized;
- n. In those instances where a majority Subcontractor is selected for a scope of work for which MWBE Proposals were submitted, the Proposer shall submit records of all quotations received from MWBE firms and from the selected majority Subcontractor, and provide an explanation of the reasons why the MWBE firms will not be used during the course of the Contract. Receipt of a lower price quotation from a non MWBE firm prior to or at the time of Proposal Opening will not in itself excuse a Proposer's failure to meet participation goals. It is incumbent upon the Proposer to demonstrate that MWBE firms were not rejected as unqualified without a thorough and documented investigation of their capabilities and capacity.
- o. Additional information on meeting good faith efforts can be found by going to <https://orlandoairports.net/airport-business>.

### **3.9 Verification of Employment Status**

- a. Prior to the employment of any person under this Contract, the Contractor shall utilize the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of all new employees hired by the Contractor during the Contract term, and an express requirement that Contractors include in such subcontracts the requirement that Subcontractors performing work or providing services pursuant to the state Contract utilize the E-Verify system to verify the employment eligibility of all new employees hired by the Subcontractor during the Contract term. For more information on this process, please refer to United States Citizenship and Immigration Service site at:

<http://www.uscis.gov/portal/site/uscis>.

- b. **Only those employees determined eligible to work within the United States shall be employed under this Contract.**
- c. By submission of a Proposal in response to this solicitation, the Contractor affirms that all employees in the above categories shall undergo e-verification before placement on this Contract. The Contractor shall commit to complying with this requirement.

### **3.10 Airport Security**

The successful Proposer will be required to comply with all applicable regulations of the TSA and of the Aviation Authority relating to Airport security, including those relating to access to the AOA of the Orlando International Airport, as such regulations may be in effect or changed from time to time.

### **3.11 Scrutinized Company List**

Sections 287.135 and 215.473, Florida Statutes, prohibit a Florida agency or local governmental entity from contracting with companies, for goods or services over \$1,000,000 that are on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or to engage in any Business operations with Cuba or Syria.

Sections 287.135 and 215.4725 also prohibit Florida Agencies from contracting with companies, for goods or services in **any** amount that are on the list of Scrutinized Companies that Boycott Israel. The list of "Scrutinized Companies" is created pursuant to Section 215.473, Florida Statutes. A copy of the current list of "Scrutinized Companies" can be found at the following link:

[https://www.sbafla.com/fsb/Portals/FSB/Content/Performance/Quarterly/2019\\_01\\_29\\_Web\\_Update\\_PFIA\\_Prohibited\\_List.pdf?ver=2019-01-29-130702-420](https://www.sbafla.com/fsb/Portals/FSB/Content/Performance/Quarterly/2019_01_29_Web_Update_PFIA_Prohibited_List.pdf?ver=2019-01-29-130702-420)

The company representative authorized to sign on behalf of the Proposer, hereby Certifies that the company identified as the Proposer is not listed on either the Scrutinized Companies with Activities in Sudan List; or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List; is not participating in a boycott of Israel; and does not have any business operations with Cuba or Syria. Authorized representative understands that pursuant to Sections 287.135 and 215.473, Florida Statutes, the submission of a false certification may subject the Proposing Company to civil penalties, attorney's fees, and/or costs.

### **3.12 Proprietary Information**

- a. In accordance with Chapter 119 of the Florida Statutes (Public Records Law) and except as may be provided by other applicable State and Federal Law, all Proposers should be aware that the RFP and the responses thereto are public records. However, the Proposers are requested to identify specifically any information contained in their Proposal which they believe to be exempt from disclosure, citing specifically the applicable exempting law. The Aviation Authority will consider a Proposer's opinions regarding the applicability of Chapter 119, Florida Statutes, but shall not be obligated to concur in such opinions.
- b. All information and documents received from Proposers in response to this RFP will become the property of the Aviation Authority, will not be returned to the



Proposers, and will be incorporated in the final Agreement in the event of Agreement award, with the exception of any financial information exempt from the Public Records Laws. Any work product produced as part of the Agreement will become the exclusive property of the Aviation Authority.

**The remainder of this page is intentionally blank.**

## 4.0 **PROPOSAL SUBMISSION REQUIREMENTS**

### 4.1 **Opening**

- a. Sealed proposals are exempt in accordance with Florida Statute 119.071(1) (b) 2. The names of the firms submitting a competitive solicitation will be read aloud at the time of the opening. No details of the competitive solicitation will be released until such time as the Aviation Authority provides notice of an intended decision or until 30 days after opening the bids, proposals, or final replies, whichever is earlier.
- b. Submittals must be submitted no later than **11:00 a.m. Eastern Time on Tuesday, October 18, 2022** in sealed envelopes bearing the words **"Purchasing Proposal 23-115 Benefit Consultant Services, for the Orlando International Airport"**.
- c. Each Proposer shall submit three (3) complete sets of the Submittal:
  1. **One hardcopy** marked "ORIGINAL".
  2. **One hardcopy** marked "COPY".
  3. **One COMPLETE** electronic copy on a USB drive in PDF format. The Submittal in PDF format shall have *navigational bookmarks* inserted in lieu of any tabs required in the hard copy. The entire submittal shall not exceed a single USB Flash Drive. In cases where there are discrepancies between the electronic PDF and hard copy, the hard copy shall take precedence.
- d. The Proposal Summary will be posted on the Aviation Authority's Purchasing Department's website: [www.orlandoairports.net/purchasing](http://www.orlandoairports.net/purchasing) and on Merzell USA's website: <https://app.negometrix.com/buyer/5681>.

### 4.2 **Delivery of Proposal**

- a. It is the sole responsibility of the Proposer to ensure that their submittal reaches the Purchasing Department. All proposals, unless otherwise specified, must be delivered to the following address no later than the time and date specified in the solicitation:

**Greater Orlando Aviation Authority  
Purchasing Department  
8652 Casa Verde Road, Building 811  
Orlando, Florida 32827-4338**
- b. Proposer should include the Proposal Number and Name, Name and Address of Proposer, and the Date of the opening on the outside of the box or envelope. Proposals submitted by e-mail, telephone or fax shall not be accepted. An e-mailed or a faxed submittal shall be rejected as non-responsive regardless of where or when it is received.

- c. Proposers are cautioned that they are solely and strictly responsible for delivery to the specific location cited prior to the specified opening date and time. Therefore, if your submittal is delivered by an express mail carrier or by any other means, it is solely your responsibility to ensure delivery to the above address. The Purchasing Department will not be responsible for deliveries made to any place other than the specified address.
- d. **The time/date stamp clock located in the Purchasing Department Office shall serve as the official authority to determine lateness of any Submittal. The Submittal time shall be scrupulously observed. Under no circumstances shall Submittals delivered after the time specified be considered. Late Submittals will be returned unopened.**

#### **4.3 Preparing Responses in Required Proposal Format**

- a. In order to have a Proposal considered by the Aviation Authority, the Proposer must submit a complete Proposal. The Proposal requirements in this section are not to limit the creativity in the presentation of a Proposal, but rather to list the minimum criteria elements that must be included in the Proposal.
- b. It is the Proposer's responsibility to incorporate all pertinent information effectively, to communicate the Proposer's concept and meet the mandatory requirements listed in Section 3.1 Mandatory Proposer's Requirements, Section 3.2 Minimum Proposer's Requirements, and Section 3.3 Evaluation of Proposal Award. The Proposer should prepare its proposal simply and economically, providing a straightforward, concise description of the Proposer's capability to satisfy the conditions and requirements of this competitive solicitation.
- c. Material is to be submitted in a loose-leaf binder format, not as bound documents or with coil spines (plastic or metal). Proposals shall include the information requested in a single volume, with each response tabbed, numbered and ordered in the same manner as provided in this RFP.
- d. The information should be submitted on no more than 50 one-sided 8.5 X 11 inch pages in Arial font with no smaller than 12-pitch font, excluding required Attachments as listed in Tab 8. To expedite the Aviation Authority's evaluation of the proposal, the proposal shall be organized and sections tabbed in the following order:

##### **Tab 1 – Table of Contents**

Please insert a table of contents and a set of tabs to identify each section of the Proposal to facilitate quick reference.

## **Tab 2 – Executive Summary**

### **A. General Company Information**

1. Provide the name of Proposer's company (including the name of any parent company), Include:
2. Contact name and complete contact information of individual responsible for account (“Lead Individual”).
3. Type of organization (corporation, sole proprietor, partnership, other).

### **B. Cover Letter**

The cover letter on company letterhead shall be signed by an authorized representative of the Proposer. The letter should indicate the Proposer's commitment to provide the services proposed and include the following:

1. Proposer must certify in writing with its Proposal that Proposer is registered/qualified to do business in the State of Florida. Include a copy of such registration/qualification to the Aviation Authority with the Proposal submission.
2. Proposer shall have a minimum of five (5) years of continuous and recent experience providing services of the type described in the Scope of Services above, prior to the deadline of this RFP. Cover letter shall include an affirmative statement and documentary proof of such experience with the Proposal submission.
3. An affirmative statement that it is independent of the Aviation Authority.
4. Proposer shall provide affirmative statement of their willingness to execute an agreement substantially in the form attached as Exhibit 2.
5. If the Proposer is a joint venture or partnership, the Experience and Qualifications may be satisfied by the Joint Venture or Partnership entity. Please state whether the entity is currently in existence, is being formed specifically for this project, or whether it will be formed upon award. If the Joint Venture is formed specifically for this agreement/project or will be formed upon award, please provide a copy of the Joint Venture or Partnership Agreement with the RFP.

### Tab 3 – Proposer’s Knowledge and Experience

**A. Proposer’s knowledge and experience, including:**

1. Proposer shall include a narrative of the experience and qualifications of the Proposer relative to benefit consulting services.
2. Provide documentation on other projects, a minimum of three (3), up to a maximum of five (5), which best represent the Proposer’s skill and experience in providing the Services of **similar type and complexity** as the services required herein. Include brief descriptions that demonstrate the Proposer’s experience relative to the Scope of Services listed in Section 2.0.

**B. Key Personnel**

1. The Proposer shall identify the Lead Individual to be assigned to the Aviation Authority’s account who has at least five (5) years of successful experience, describe the experience, which is with similar scope to that of the Orlando International Airport.
2. Provide names and titles of key personnel and an organizational chart of your proposed project team. Clearly identify and describe the proposed role for each key personnel. Provide professional resumes of all key personnel.
3. Describe the key personnel experience with similar scope to that of the Orlando International Airport.

**C. References**

The Proposers’ references should demonstrate that it has the experience required, and reasonably has the reputation to perform the Scope of Services described. It is the responsibility of the Proposer to provide references and information that most closely demonstrate experience with airport or governmental accounts of similar size, complexity, and risk exposure as the Aviation Authority. References shall be for work **substantially similar in scope and magnitude** and shall be able to validate the Proposer’s capabilities and experience.

1. The Proposer shall provide a minimum of three (3), up to a maximum of five (5) references for which your proposed Lead Individual and key personnel have performed these services.
2. Proposer shall provide the following information for each reference:
  - a) Name
  - b) Address

- c) Contact person
  - d) Telephone number and email address of contact person
  - e) Brief Description of Overview of Work Performed
    - 1) Proposer’s Role and Lead Individual and summary of work performed by Proposer. Indicate which team member(s) provided services.
    - 2) Provide the name of the firm member working with your firm that was the primary contact for the reference provided.
  - f) Date of Services/Status (current or past client).
3. The Proposer authorizes the Aviation Authority, its staff or consultants to contact any of the references provided in the response and specifically authorizes such references to release either orally or in writing, any appropriate data with respect to the Proposer and its Engagement Team members.

**Tab 4 –Approach and Methodology Plans**

**A. Work Plan**

- 1. Approach to assisting governmental entities in maximizing employee benefits while minimizing the financial impact of rising premiums.
- 2. RFP process for selecting related providers and carriers.
- 3. Approach to resolving provider/carrier/customer issues.
- 4. Methodology and approach to the Scope of Services as listed in Section 2.0

**B. Transition Plan**

The Transition Plan shall describe in detail, including a timeline, what the Proposer will do to ensure the benefit plan renewal documents are complete, correct, and compliant in accordance with negotiated terms for Plan Year 2024. Submit a Transition Plan based on the following information:

- 1. March 31, 2023 - The current Benefit Consultant contract expires.
- 2. May 2023 - The Benefit Consultant will commence marketing and negotiating the benefit plan renewals per Exhibit 1 Benefits Summary for Plan year commencing January 1, 2024.

3. September 22, 2023 - The Aviation Authority Board will consider Staff's recommendations for benefit plan renewals at the Board meeting.
4. November 2023 - Employee/Retiree open enrollment process will commence.
5. The awarded Proposer will be responsible for ensuring the Plan Year 2024 renewal documents are complete, correct and compliant in accordance with all negotiated terms, etc.

**C. Communication Plan**

Include the proposed method for communication and coordinating with the Aviation Authority, its program HR management team and consultants. Provide a sample of work product for benefits communications.

**D. MWBE Participation Plan**

The Aviation Authority has set a MWBE participation goal of seventeen percent (17%) for this solicitation, please provide the level of MWBE participation that will be provided, and what services will be performed by the MWBE firm.

**Tab 5 – Proof of Insurance**

The *Proposer's* *submittal shall demonstrate ability to meet* all portions listed in *Section 3.7 Insurance Requirements* by providing evidence of one of the following:

1. Certificate of Insurance on Acord form or form acceptable to Aviation Authority, or
2. Signed affirmation of ability to comply from a licensed insurance agent, or Insurance quote.

**Tab 6 – Prior or Pending Convictions, Indictments, Investigations, Regulatory Investigations, and Conflicts Of Interest**

- A.** The Proposer shall provide a description of all prior or pending convictions, indictments, investigations, and regulatory investigations, either civil or criminal that relate to arbitrage rebate calculation services, in which Proposer or its affiliates, subsidiaries, parent company, directors, senior officers, senior regional officers, the Lead Individual, or Engagement Team members have been involved with in the last five (5) years immediately preceding the date of Proposer's response to this RFP. *Or provide an affirmative statement that there are none.*

**B. Conflict of Interest/Representation of Other Clients**

Describe any conflicts of interest with the Aviation Authority that the Proposer's has or may have, including with any other parties who are potentially involved in any contemplated financings of the Aviation Authority, and how that conflict of interest would be mitigated.

1. Identify any current clients which may represent a possible conflict.
2. Identify any clients, current or within the past five (5) years that are airports or transportation firms or vendors who do business the Aviation Authority.
3. Identify any current clients which may complement this association.
4. Describe how conflicts of interest would be mitigated or provide a statement that there are none.

**C. Claims Information**

Disclose all lawsuits, arbitrations and claims filed or raised by or against the Proposer over the last five (5) years, specifically identifying the project involved, the parties involved, the nature of the claim(s), amount at issue, disposition or status and litigation, case style, number, and jurisdiction.

**Tab 7 - Additional Information**

If there is no additional information provide a statement: *"No additional information."*

**Tab 8 – Response Forms to be turned in to the Aviation Authority**

The Response forms, listed in Section 5.0, shall be completed and signed by the Proposer's duly authorized representative. Failure to return the forms with the submittal may cause the Proposal to be deemed as non-responsive.

2. Proposer's Certification Form
3. Proposal Fee Schedule
4. Addendum Receipt Verification Form
5. Scrutinized Company Certification Form
6. Conflict of Interest Disclosure Form
7. MWBE Forms
8. Proposer's W-9
9. E-Verification Certification Form
10. No Proposal Response Form, if applicable



## 1. Proposer's Certification Form

I have carefully examined the Solicitation and any other documents accompanying or made a part of this Solicitations.

I hereby propose to furnish the goods or services specified in this Solicitation at the prices or rates quoted in my submittal. I agree that my submittal will remain firm for a period of up ninety (90) days in order to allow the Aviation Authority adequate time to evaluate the submittals.

I certify that all information contained in this Solicitation is truthful to the best of my knowledge and belief. I further certify that I am duly authorized to submit this Solicitation on behalf of the Proposer as its act and deed and that the Proposer is ready, willing and able to perform if awarded the Contract.

I certify, under oath, that this Solicitation is made without prior understanding, agreement, connection, discussion, or collusion with any other person, firm or corporation submitting a Solicitation for the same product or service. I further certify that no officer, employee or agent of the Aviation Authority or any other Proposer has a financial interest in this Solicitation. I further certify that the undersigned executed this Proposer's Certification with full knowledge and understanding of the matters therein contained and was duly authorized to do so.

<b>Company</b>	<b>Sworn to and subscribed before me by means of:</b>
	<input type="checkbox"/> <i>physical presence</i> or <input type="checkbox"/> <i>online notarization</i>
<b>Bidder's Signature</b>	<i>this _____ day of _____ 2022</i>
<b>Print Name and Title</b>	<i>by _____ who is</i>
	<input type="checkbox"/> <b>Personally Known;</b> or <input type="checkbox"/> <b>Produced Identification. Type of identification produced:</b>
<b>Address:</b>	<b>[Check applicable box to satisfy identification requirement of FLA. Stat. §117.05)</b>
	(STATE OF FLORIDA Seal
<b>Date</b>	COUNTY OF _____ )
<b>Duns Number</b>	
<b>Federal Tax Id Number</b>	<b>Notary Public My Commission Expires:</b>
<b>Email:</b>	<b>Printed, typed or stamped commissioned name of Notary Public)</b>

***The Aviation Authority only requires Company Federal Tax Id numbers. The Aviation Authority is not requesting individual social security numbers.***

**2. Proposal Schedule of Fees**

Each Proposer shall submit its fixed fee for providing the Transition Plan services for the period from January 1, 2023 through March 31, 2023:

<b>Transition Plan</b>	\$ _____
------------------------	----------

**Annual Fixed Fees**

Each Proposer must provide a Fixed Annual Fee for services as specified per Section 2.0 Scope of Services, including but not limited to labor, travel, materials and overhead cost for providing Benefit Consulting Services. Out-of-pocket expenses incurred by Proposer will not be separately reimbursed.

DESCRIPTION	YEAR 1 FIXED FEE (04/01/2023 – 03/31/2024)	YEAR 2 FIXED FEE (04/01/2024 – 03/31/2025)	YEAR 3 FIXED FEE (04/01/2025 – 03/31/2026)	YEAR 4 FIXED FEE (04/01/2026 – 03/31/2027)
Scope of Services	\$ _____	\$ _____	\$ _____	\$ _____

**Additional Services**

Each Proposer shall provide its Hourly Rates for Additional Services as described in Section 2.2 that are not provided for in the Scope of Services, to be performed by the Engagement Team. These Additional Services shall be requested by and approved in advance in writing by the Aviation Authority.

TITLE OF ENGAGEMENT TEAM MEMBER	HOURLY RATE
	\$ _____ per hour
	\$ _____ per hour

\_\_\_\_\_ Company Name

By: \_\_\_\_\_

Its: \_\_\_\_\_  
Name & Title, Typed or Printed

**3. Addendum Receipt Verification**

Proposers must acknowledge each addenda on this form and include with your submittal. Failure to acknowledge and include each addenda may result in a non-responsive Proposal. The undersigned acknowledges receipt of the following addenda to the Documents (Give number and date of each):

Addendum No. \_\_\_\_\_ Dated \_\_\_\_\_

Addendum No. \_\_\_\_\_ Dated \_\_\_\_\_

Addendum No. \_\_\_\_\_ Dated \_\_\_\_\_

Addendum No. \_\_\_\_\_ Dated \_\_\_\_\_

\_\_\_\_\_  
Name of Proposer

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Name (Typed or Printed)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

**4. Certification Regarding Prohibition against Contracting with Scrutinized Companies**

I hereby certify that neither the undersigned entity, nor any of its wholly owned subsidiaries, majority-owned subsidiaries, parent companies, or affiliates of such entities or business associations, that exists for the purpose of making profit have been placed on the Scrutinized Companies that Boycott Israel List created pursuant to s. 215.4725 of the Florida Statutes, or are engaged in a boycott of Israel.

In addition, if this solicitation is for a Contract for goods or services of one million dollars or more, I hereby certify that neither the undersigned entity, nor any of its wholly owned subsidiaries, majority-owned subsidiaries, parent companies, or affiliates of such entities or business associations, that exists for the purpose of making profit are on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, created pursuant to s. 215.473 of the Florida Statutes, or are engaged in business operations in Cuba or Syria as defined in said statute.

I understand and agree that the Aviation Authority may immediately terminate any Contract resulting from this solicitation upon written notice if the undersigned entity (or any of those related entities of Proposer as defined above by Florida law) are found to have submitted a false certification or any of the following occur with respect to the company or a related entity: (i) it has been placed on the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel, or (ii) for any Contract for goods or services of one million dollars or more, it has been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or it is found to have been engaged in business operations in Cuba or Syria.

\_\_\_\_\_  
Name of Proposer

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Name (Typed or Printed)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

**5. Conflict of Interest Disclosure Form**

The award of this Contract is subject to the provisions of Chapter 112, Florida Statutes. All Proposers must disclose within their Proposal the name of any officer, director, employee or agent (or their spouse or child) who is also an employee or officer of the Aviation Authority.

By submission of this Proposal, the undersigned certifies, under penalty of perjury, which to the best of their knowledge and belief, have met the Florida Statute.

Comments:

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Acknowledged by:

\_\_\_\_\_  
Name of Proposer

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Name (Typed or Printed)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

**6. MWBE FORMS**

**LETTER OF INTENT/AFFIRMATION**  
**Minority/Woman Owned Business Enterprise (MWBE)**  
*(This page shall be submitted for each MWBE Firm)*

**Proposer:** Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**MWBE Firm:** Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**MWBE Contact:** Name: \_\_\_\_\_ Phone ( ) \_\_\_\_\_  
 Email: \_\_\_\_\_

**MWBE Certification Agency:** \_\_\_\_\_ Expiration Date \_\_\_\_\_  
*Each MWBE Firm shall submit evidence (such as photocopy) of their certification status*

Scope of Work	Quantity	Rates	Total

Year 1:\$ \_\_\_\_\_ Year 2:\$ \_\_\_\_\_  
 Year 3:\$ \_\_\_\_\_ Year 4:\$ \_\_\_\_\_  
 Year 5:\$ \_\_\_\_\_ Year 6:\$ \_\_\_\_\_  
 Year 7:\$ \_\_\_\_\_

Total Term Value: \$ \_\_\_\_\_ Percent of Total Proposal: \_\_\_\_\_%

**AFFIRMATION:**

The above-named MWBE Firm affirms that it will perform the portion of the Contract as describe above for the estimated dollar value as stated above.

**By:** \_\_\_\_\_  
 (MWBE Owner's Signature) (Title) (Date)

The Proposer affirms it is committed to utilizing the above named MWBE Firm for the portion of the Contract as described above for the estimated dollar value as stated above.

**By:** \_\_\_\_\_  
 (Proposer's Authorized Signature) (Title) (Date)

**In the event the Proposer does not receive award of the prime Contract, any and all representations in this Letter of Intent/Affirmation shall be null and void.**

**MONTH ENDING:** \_\_\_\_\_

**GREATER ORLANDO AVIATION AUTHORITY**

**MWBE DISBURSEMENT FORM**

(To Be Submitted with EACH Invoice and Faxed to (407) 825-3004 or E-Mailed to [DForms@goaa.org](mailto:DForms@goaa.org))

**CONTRACT:** \_\_\_\_\_

(Number and Name)

<b>PAYMENTS</b>	Current Year			Previous Years Totals
	(A)	(B)	(C)	(D)
	Current Payment	Previous Payments	Cumulative Payments	Amount
Prime Contractor Payment				
Percent Achieved				
	(Total Col E / Total Col A)	(Total Col F / Total Col B)	(Total Col G / Total Col C)	(Total Col H / Total Col D)

<b>MWBE SUBCONTRACTOR/VENDOR</b>	Current Year			Previous Years Totals
	(E)	(F)	(G)	(H)
	Current Payment	Previous Payments	Cumulative Payments	Amount
<b>TOTALS</b>				

**Summary**

Original Prime Contract Total:	\$	Original Sub Contract Total:	\$
Amendment(s) Approved:	\$	Amendment(s) Approved:	\$
Revised Prime Contract Total:	\$	Revised Sub Contract Total:	\$

**Contract Goal:**

**Cumulative Goal Achieved:**   
(Sum of totals G and H / Sum of totals C and D)

**Remarks:**



7. **Current W9**

**Request for Taxpayer Identification Number and Certification ►**

Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

**8. E-Verification Certification Form**

Effective January 1, 2021, public and private employers, contractors and subcontractors will be required to register with, and use the Employment Eligibility Verification System (E-Verify) to verify the work authorization status of all newly hired employees. The E-Verify system can be obtained at the U.S. Department of Homeland Security website: <http://www/dhs.gov/E-Verify>.

**“Contractor”** means a person or entity that has entered or is attempting to enter into a contract with a public employer to provide labor, supplies, or services to such employer in exchange for salary, wages, or other remuneration (also referred to as Bidder, Vendor or Contractor).

**“Subcontractor”** means a person or entity that provides labor, supplies, or services to or for a contractor or another subcontractor in exchange for salary, wages, or other remuneration (also referred to as Sub- Vendor or Sub-Contractor).

Vendor/Contractor/Subcontractor acknowledges and agrees to utilize the U.S. Department of Homeland Security’s E-Verify System to verify the employment eligibility of:

- All persons employed by Vendor/Contractor/Sub-Contractor during the term of the contract, (including assigned sub-vendors/sub-contractors/sub-contractors), to perform employment duties within Florida and any work in pursuant to the contract with the Aviation Authority.

*By entering into a contract with the Aviation Authority, the Contractor/Contractor becomes obligated to comply with the provisions of Section 2. Section 448.095, Fla. Stat., "Employment Eligibility," as amended from time to time. This includes, but is not limited to, utilization of the E-Verify System to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien.*

***The contractor shall maintain a copy of such affidavit for the duration of the contract. Failure to comply will lead to termination of resulting contract, or if a subcontractor knowingly violates the statute, the subcontract must be terminated immediately. Any challenge to termination under this provision must be filed in the Circuit Court of Orange County, Florida no later than 20 calendar days after the date of termination. If the resulting contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of 1 year after the date of termination.***

***I hereby acknowledge and agree that use of the U.S. Department of Homeland Security’s E-Verify System during the term of the contract is a condition of the resulting contract with the Greater Orlando Aviation Authority.***

Company Name: \_\_\_\_\_

Authorized Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date \_\_\_\_\_

\*\*\*\*\*

**State of** \_\_\_\_\_

**County of** \_\_\_\_\_

This instrument was acknowledged before me on \_\_\_\_\_(Date)

**Notary Public Signature** \_\_\_\_\_

**9. No Proposal Response**

**NO PROPOSAL RESPONSE**

**TO**

**REQUEST FOR PROPOSALS**

If your firm is unable to submit a Proposal at this time, please provide the information requested in the space provided below and return to:

**GREATER ORLANDO AVIATION AUTHORITY  
PURCHASING DEPARTMENT  
8652 CASA VERDE ROAD, BUILDING 811  
ORLANDO, FLORIDA 32827-4338**

We have received Request for Proposals, under **Purchasing Proposal 23-115 Benefits Consultant Services for the Orlando International Airport, opening [Tuesday, October 18, 2022 at 11:00 a.m. Eastern Standard Time](#)**, at the Greater Orlando Aviation Authority, Orlando International Airport, Purchasing Department, 8652 Casa Verde Road, Building 811, Orlando, Florida 32827-4338. Our firm's reason for not submitting is:

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\_\_\_\_\_  
Name of Proposer

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Name (Typed or Printed)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

## **Exhibit 1     Current Benefit Summary**

The Aviation Authority's Health and Welfare plans consist of Medical, Dental, Vision, Life Insurance, Short-Term Disability and Long-Term Disability. For the Choice Plan, the Aviation Authority pays 90% of employee premium and 80% of dependent premium and for the Choice Plus Plan, the Aviation Authority pays 85% of employee premium and 75% of dependent premium for regular employees.

For non-regular employees, the Aviation Authority pays 70% of employee premium and 0% for dependent premium. Retirees, based on years of service, are covered at 0%, 50%, 75% and 100%.

Coverage categories are: Employee Only; Employee & Spouse; Employee & Child(ren) and Employee & Family.

### **CURRENT CARRIERS: (*Plan Year – January 1, 2022*)**

- CIGNA (Fully Insured) Medical
  - o Choice Plan (In Network Only)
  - o Choice Plus Plan
  - o HDHP Plan w/ Health Savings Account (HSA)
- Flexible Spending Account (FSA) CIGNA
- Dental
  - o DHMO Plan
  - o Preferred Provider Organization (PPO Plan)
- Life Insurance & AD&D
  - o Employee Coverage
  - o Retiree Coverage
  - o Optional Dependent Coverage
  - o Optional Employee Coverage
- Short Term Disability (Advice to Pay)
- Long Term Disability

#### VSP (through CIGNA)

- Vision
  - o Base Plan
  - o Buy-Up Plan

#### Health Equity

- COBRA

#### Aetna

- Employee Assistance Program

**NUMBER OF COVERED EMPLOYEES / RETIREES / COBRA MEMBERS:**

As of September 1, 2022 - Total Active Employees: 807

Medical:

Employees	<u>Choice Plan</u>	<u>Choice Plus Plan</u>	<u>HDHP Plan</u>
Regular Active Employees	607	52	31
Retirees	95	7	1
COBRA	0	0	
Medicare Supplements (Plans A,F,G, and N)	232		

Dental:

Employees	DHMO	PPO
Regular Active Employees	187	526
Retirees	48	314
COBRA	1	3

Group Life Insurance:

Employee:	803
Retirees:	440
Optional Dependent:	204
Optional Employee:	403

Flexible Spending Account:

Employees: 271