



citycounty insurance services  
cisoregon.org

## Request for Proposals (RFP) Addendum

### Legal Services for CIS Employee Benefits Trust

CIS  
1212 Court Street NE  
Salem, OR 97301  
(503) 763-3800

<b>RFP Schedule</b>	
Issuance of RFP:	<b>September 1, 2020</b>
Submission of Questions about the RFP:	<b>September 15, 2020, 5:00 p.m. (PT)</b>
Proposals Due:	<b>October 1, 2020, 5:00 p.m. (PT)</b>
Anticipated Contract Award:	<b>December 1, 2020</b>
Commencement of Services:	<b>January 1, 2021</b>

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## ADDENDUM

### A. BACKGROUND

On September 1, 2020, CIS issued a Request for Proposals (RFP) to solicit offers from qualified attorneys or law firms to provide legal services for the CIS Employee Benefits Program.

CIS is issuing this Addendum to the RFP to respond to written questions we received from potential proposers. The Addendum modifies the original RFP document only to the extent indicated. All other areas of the original RFP remain in effect and can only be modified in writing by CIS. This Addendum is made an integral part of the original RFP. It is the responsibility of all proposers to conform to this Addendum. Proposers who have already submitted proposals may either: 1. Submit an addendum to their proposal; or 2. withdraw the original proposal and submit a new one. Any addendum or revised proposal must be submitted no later than the **Proposal Due Date of 5:00 p.m. (PT) on October 1, 2020.**

### B. RESPONSES TO QUESTIONS

**Question 1. How many client references regarding employee benefit services work would you like included in the proposal? We typically include three references but can include more if desired.**

**Response:** No fewer than three references is acceptable.

**Question 2. Please provide additional details about the types of sample materials and/or sample training materials you would like us to provide. We typically would describe responsive training materials and provide one redacted sample if this is consistent with your expectations. Also, please confirm the intended audience. It appears that the request for sample training materials should target member employers. The other possibility would be the Board of Trustees or both groups.**

**Response:** We anticipate training will only need to be provided on an occasional basis. In most cases, the training would be for CIS members. Every February, CIS hosts an annual conference attended by over 250 CIS members. In the past, our contracted legal team has conducted ACA and HIPAA training for CIS members at this event. Please provide training sample materials for employers, intended for a large audience.

**Question 3. Please confirm that our client would be the CIS Employee Benefits Trust. This is apparent from the RFP, but we note that "CIS" and "Trust" are referred to separately in the RFP. However, from our initial review of the Declaration of Trust, it appears that the applicable association settlors are the League of Oregon Cities and the Association of Oregon Counties and that they formed the Trust known as the CIS Employee Benefits Trust.**

Presumably CIS handles trust management and risk pooling services as part of, basically, trust fund office operations.

**Response:** The client will be CIS, as administrator of the CIS Employee Benefits Trust.

**Question 4.** Are you able to share the CIS Employee Benefits Program's current annual legal budget or last year's annual spend for the requested legal services? As an alternative, an estimate of last year's total legal hours worked by outside counsel would be helpful if you prefer this disclosure.

**Response:** Our current annual budget for legal services pertaining to the CIS Employee Benefits program is \$15,000. We anticipate the budgeted amount to be stable, absent legislative action that could impact the program, such as major changes to the ACA.

**Question 5.** Are such dollars or hours indicative of the level of services anticipated for 2022? Please describe material deviations, if any, based on current planning.

**Response:** See the answer to **Question 4**.

**Question 6.** What type of pricing models has CIS been engaged in regarding this work (i.e. hourly rates, fixed-fees, etc.)? Please describe any alternative fee arrangements and if they were successful for CIS.

**Response:** We are currently billed at an hourly rate.

**Question 7.** On Page 7, item D3, you inquire how we would approach providing legal services for the CIS benefits programs in general, as well as to specific CIS members. The scope of work does not expressly mention direct legal services to CIS members. Do you have examples of the types of services contemplated by the second half of that question?

**Response:** The CIS negotiated hourly rate with our current legal provider is also available to our membership, at their cost, if they have legal questions connected to their participation in the CIS Employee Benefits Trust. As an example, our members have engaged our current legal provider when they have had questions regarding the ACA and HIPAA.

**Question 8.** Similar question to the above, on Page 7, item D4, you ask about training materials that we would provide when working with a CIS member. Further clarification would also be helpful.

**Response:** See the answer to **Question 2**.