

FAUQUIER COUNTY GOVERNMENT AND PUBLIC SCHOOLS

PROCUREMENT DIVISION

320 Hospital Drive Ste. 23

Warrenton, Virginia 20186

Phone: (540) 428-8713

Fax: (540) 347-5753

NOTICE OF CONTRACT MODIFICATION

1. DATE: September 21, 2009
2. COMMODITY NAME: Employee Benefits & Communications Consulting Services
3. CONTRACT NUMBER: 86-06smc
4. SUPERCEDES: N/A
5. CONTRACT PERIOD: August 28, 2009 through August 27, 2010
6. RENEWAL OPTIONS: Two (2) one-year renewals remaining
7. FIRM: Wachovia Insurance Services (*Contact person: Greg Snow*)
FCG&PS VN: 642717 9020 Stony Point Pkwy Suite 200
FIN# 56-1882208 Richmond, VA 23235
PH (804) 267-3175 FX (804) 330-1386
8. TERMS: Net 45 days
9. FOR FURTHER INFORMATION CONTACT: Susan R. Monaco, CPPB
PH (540) 428-8713

NOTICE TO ALL FAUQUIER COUNTY GOVERNMENT AND PUBLIC SCHOOL USING DEPARTMENTS: This contract is the result of a competitive bid program and its use must follow the FCG&PS Procurement Policy/Procedures for the purchase of the commodity listed herein. Please see the reverse side of this notice for further instructions regarding this contract.

By: _____
Susan R. Monaco, CPPB
Procurement Manager

INSTRUCTIONS

1. Orders: All FCG&PS Using Departments must order services listed by issuing FCG&PS Purchase Orders per FCG&PS Procurement Procedures Manual. An extra copy of the Procedures Manual can be obtained by calling Procurement at (540) 428-8717 or 8720.
2. The applicable contract number, vendor number, estimated total dollar amount (can be done as a “Not to exceed” estimated figure), contact person with phone number, and billing/delivery address must be shown on each purchase order for Finance & Firm use.
3. Inspection of services performed and approval of Firm’s invoice is the responsibility of the receiving using department.
4. Any complaint as to quality of services, faulty or delinquent delivery, or violation of contract provisions by contractor shall be reported to FCG&PS Procurement for handling with the Firm. All complaints must be submitted in writing and can be forwarded to Procurement via fax or courier.
5. Renewals: As stated on the face of this notice, two (2) one-year renewals remain on this contract. Renewal notification will be issued by the Contract Officer, with input requested from the using departments, approximately ninety (90) days in advance of the expiration date of the current term.
6. Price Adjustments: Changes to contract prices will be negotiated only at the time of renewal. All price increases must be approved by the Contract Officer. Contract users will be sent notification of contract change from the Procurement office as official notification of such changes, if approved.
7. Use of Contract by Other Political Jurisdictions: This clause is contained in RFP#86-06sm, which became the contract. This contract may therefore be extended to Northern Virginia, Metropolitan Washington Council of Governments jurisdictions and other jurisdictions and Political Subdivisions of the Commonwealth of Virginia with the authorization of the Contractor. FCG&PS acts only as the “Contracting Agent” for these jurisdictions and political subdivisions.

FAUQUIER COUNTY GOVERNMENT AND PUBLIC SCHOOLS
Employee Benefits and Communications Consulting Services RFP # 86-06sm
FEE SCHEDULE (Please submit under separate cover)

	<u>FY07</u>	<u>FY08</u>	<u>FY09</u>	<u>FY10</u>	<u>FY11</u>	<u>FY12</u>
		Optional Years				
		(FY = Fiscal Year July 1 - June 30)				
Development of RFP & Selection of Vendor for Health Insurance Program	\$ <u>26,500</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>
Revised RFP Fee (medical & RX)	\$ <u>23,000</u>					
County & Schools:						
Annual Consulting Services	\$ <u>58,000</u>	\$ <u>60,000</u>	\$ <u>62,000</u>	\$ <u>64,200</u>	\$ <u>66,400</u>	\$ <u>68,700</u>
Revised Fee	\$ 54,500	\$ 56,400	\$ 58,400	\$ 60,400	\$ 62,500	\$ 64,700
Option 1 (excludes RFP Scope 3.2.3.4 through 3.2.3.7 & 3.2.3.9 through 3.2.3.10)	\$ 47,000	\$ 48,600	\$ 50,300	\$ 52,100	\$ 54,000	\$ 55,800
Option 2 (excludes RFP Scope 3.2.3.4 through 3.2.3.7 & 3.2.3.9 through 3.2.3.12)*	\$ 41,000	\$ 42,400	\$ **40,608	\$ **39,510	\$ 47,000	\$ 48,700
* Note: Review of all items in 3.2.3 is <u>included</u> as part of the Annual Consulting Services Option 2 fee, but Design, Implementation and Administration of new/existing programs is included only for Medical, Dental, Vision, and Pharmacy Carve Out Programs. Addition to 3.2.16: "Additional projects/services shall be quoted to the Owner on a per-project basis as a not-to-exceed fee, or at contract hourly rates for services, whichever method is in the Owner's best interest."						
Hourly Rates for Additional Services						
Principal	\$ <u>250</u>	\$ <u>250</u>	\$ <u>250</u>	\$ <u>260</u>	\$ <u>270</u>	\$ <u>280</u>
Manager	\$ <u>195</u>	\$ <u>195</u>	\$ <u>195</u>	\$ <u>200</u>	\$ <u>210</u>	\$ <u>215</u>
Staff	\$ <u>100-150</u>	\$ <u>100-150</u>	\$ <u>100-150</u>	\$ <u>100-155</u>	\$ <u>100-160</u>	\$ <u>100-165</u>

Revised August 21, 2006

**Note added after 8/28/06 final negotiation meeting*

**** Note: FY 2009 fee reduced from Oct. 2008 forward, and FY 2010 fee reduced, for Fauquier County, only, due to budget cutbacks and restraints. However, other jurisdictions interested in riding this contract must review their scope of work and requirements directly with Wachovia in order to determine what their rates will be for the work they require.
 9/21/09 renewal added Dental RFP advising services, not to exceed \$4,000.00**