



NOTICE OF INTENT TO SOLE SOURCE

Posting Date: July 8, 2024

The South Carolina Public Employee Benefit Authority (PEBA) intends to enter into a sole source contract with Linea Solutions, Inc. to complete the client services portion of the work in support of PEBA's new benefit administration system. Linea has been working on this project for a number of years and is the only vendor who has the background and experience to complete the necessary work to assist in bringing the benefits system online in a timely manner. The project completion date is estimated for the Fall of 2027; therefore PEBA intends to enter a sole source procurement to ensure continuity of operations and to complete the necessary work through the milestone target date of Fall 2027.

The Contractor shall provide Client Services in accordance with all of the requirements outlined in this Sole Source Procurement (including all attachments) and the Offeror's response thereto. The Contractor shall be responsible for oversight project management, program management, detailed requirements definition, testing support, data bridging support, data conversion support, and change management activity.

The Contractor shall provide, at a minimum, the following material and essential requirements, without deviation or modification, subject to any modifications that may be issued in an Amendment to the Request for Proposal by PEBA resulting from the question and answer phase:

3.1 New Benefits Administration System Implementation Procurement

3.1.1 The Contractor shall develop a comprehensive set of procurement documents necessary for implementing PEBA's new benefits administration system. In direct coordination with PEBA, the Contractor shall have primary responsibility for the development of the new benefits administration system implementation Request for Proposal including functional and technical business requirements development and final Request for Proposal deliverable. PEBA Business Analysts are currently in the early stages of defining draft functional and technical requirements.

3.1.2 The Contractor shall assist PEBA during the new benefits administration system implementation Request for Proposal process by providing assistance with vendor demonstrations, proposal conferences, vendor proposal evaluations, vendor negotiations, contract administration after award, and any subsequent contract change orders.

3.2 New Benefits Administration System Implementation

3.2.1 The Contractor shall provide consulting services during the implementation and deployment of PEBA's new benefits administration system and shall assist PEBA with requirements validation and detailed system design.

3.2.2 The Contractor shall have primary responsibility for business process design.

3.3 Testing and Validation of the New Benefits Administration System

3.3.1 The Contractor shall have primary responsibility for validation and acceptance test planning.

3.3.2 The Contractor shall assist PEBA with validation testing, acceptance testing, deliverable acceptance and shall assist PEBA through a post implementation stabilization period.

3.3.3 The Contractor shall have primary responsibility for requirements fulfillment (traceability).

3.4 Change Management Activities

3.4.1 While change management will be the responsibility of PEBA, the Contractor shall provide assistance to PEBA for change management activities prior, during, and post implementation of the new benefits administration system. The Contractor shall assist PEBA with the following:

- a. Change inventory and organization.
- b. Change management strategy.
- c. Communications planning.
- d. On-the-Job training for Business Analysts.
- e. System training material development for employers, internal staff, and members.
- f. System training material delivery for employers.

3.4.2 The Contractor shall have primary responsibility for stakeholder assessment.

3.5 Data Work

3.5.1 The Contractor shall assist PEBA with data vendor contract administration, contract change orders, data audit, data fix and reconciliation, and data balancing and verification.

3.5.2 The Contractor shall assist PEBA with the data vendor procurement, evaluation, and negotiations.

3.5.3 The Contractor shall have primary responsibility for conducting data vendor market research, defining data vendor requirements and development of a data vendor Request for Proposal deliverable.

3.5.4 The Contractor shall have primary responsibility for data requirements fulfillment.

3.6 Data Interface Implementation

3.6.1 The Contractor shall assist PEBA with data sharing interfaces with external partners (i.e. Third Party Administrators, Employers, State Centralized Finance System).

3.7 Project Management During Implementation and Deployment

3.7.1 The Contractor shall provide project management, and shall have primary responsibility for project management oversight, throughout implementation and deployment of the new benefits administration system.

3.7.2 The Contractor shall assist PEBA with program management and contract compliance and management.

3.8 New Benefits Administration System Delivery

3.8.1 While primary responsibility of the new benefits administration system delivery will be with the implementation vendor, the Contractor shall provide assistance to PEBA for delivery processes, development processes and standards, code analysis and verification, configuration management procedures and infrastructure configuration validation, defect management and remediation, and business continuity and disaster recovery plan.

3.8.2 The Contractor shall have primary responsibility for quality assurance for test plans and procedures.

3.9 Staffing/Key Personnel

3.9.1 The Contractor shall maintain personnel levels and expertise sufficient to complete the required services and meet the requirements specified in this contract. PEBA believes that a crucial factor in the success of this contract is the continuity and teamwork of the Contractor's staff and key personnel involved on this contract.

3.9.2 The Contractor shall provide the key personnel designated in its proposal. No diversion should be made by the Contractor without the written consent of PEBA. The Contractor shall provide PEBA with immediate notice of the termination or transfer of any key personnel, the reason(s) for the termination or transfer, and an

action plan for replacing the terminated or transferred employee. Key personnel should be replaced with personnel of substantially equal ability, knowledge and qualifications as evidenced by PEBA's written approval.

3.9.3 The Contractor shall provide PEBA, prior to replacing any key personnel, with the name and credentials of the proposed replacement(s). At PEBA's request, an interview may be scheduled with the proposed key personnel replacement. Replacement of any key personnel designated in the Contractor's proposal shall be approved, in writing, by PEBA prior to the proposed replacement(s) being assigned to this contract.

3.9.4 The Contractor shall promptly and without delay remove or reassign any Contractor personnel or subcontractor personnel assigned to this contract found unacceptable by PEBA. Such request for removal or reassignment shall be based on grounds which are specified in writing to the Contractor and which are not discriminatory. The Contractor shall replace the employee within thirty (30) calendar days by another employee with acceptable experience and skills subject to the prior approval, in writing, of PEBA. Such approval will not be unreasonably withheld or delayed.

3.9.5 PEBA shall assign a Senior Project Manager to assist the Contractor in coordinating all project management related efforts that involve PEBA resources and staff. The Senior Project Manager shall be responsible for the following:

- a. The identification, coordination, and acquisition of PEBA resources, as needed.
- b. Monitoring and reporting on the project schedule and delivery status, the quality of the deliverables, project issues and resolutions, and project risk status.
- c. The communication of project status to the PEBA Leadership Team.
- d. Holding regularly scheduled status meetings throughout the term of this contract. These meetings will involve all appropriate resources the PEBA Senior Project Manager has identified for the specific work being done on the project.
- e. Serving as a single point of contact for all contract related communications, deliverable acceptance, payment approvals, and initial dispute management.
- f. Ensuring prompt payment to the Contractor upon reaching and attaining agreed upon deliverables and milestones.

3.9.6 PEBA shall assign an internal team of Business Analysts, Information Technology, and Subject Matter Experts to assist the Contractor throughout all phases of implementing the new benefits administration system, specifically in the following:

a. Business Analysts will assist the Contractor with specific Implementation Request for Proposal sections, analysis in their respective areas of knowledge and experience, and will have primary responsibility for validation and acceptance testing, and deliverable acceptance.

b. Information Technology will assist the Contractor with the Data Vendor Request for Proposal, data interface implementation, and with system delivery processes.

3.10 General Requirements

3.10.1 In order to ensure effective direction of the requirements outlined in 3.1 through 3.8 above, a statement of work, unique to each requirement, shall be established by PEBA and the Contractor prior to the performance of each requirement. The statement of work shall include, at a minimum, detailed descriptions of all of the tasks to be performed to fully complete the requirement, which personnel from the Contractor's proposed personnel will be assigned to the requirement and their corresponding hourly rates, the total number of hours to fully complete the requirement and a clear definition of all deliverables.

3.10.2 The Contractor shall adhere to all PEBA standards, policies and procedures while on-site at PEBA and in all work performed with and for PEBA. The Contractor must submit any request for an exception in writing, and PEBA must approve it in writing. Please see the document entitled PEBA Standards which may be found at: <http://www.mmo.sc.gov/PS/PS-eip-solicitations.phtm>

3.10.3 The Contractor selected as a result of this Request for Proposal shall not submit a proposal response to serve as an implementation vendor for future system implementation initiatives.

MANDATORY MINIMUM QUALIFICATION

PEBA believes that a Contractor does not have the capability of successfully and fully performing the contract unless it meets the mandatory minimum qualification outlined below. Thus, in order to be qualified to receive an award, offerors must meet the following mandatory minimum qualification:

Offeror must have been in the business of supporting and augmenting client resources during implementation of new benefits administration systems for public sector retirement and insurance benefit clients for a minimum of ten (10) years.

While PEBA believes that an Offeror who does not meet this minimum qualification cannot successfully and fully perform the contract, Offerors are cautioned that the existence of this factor does not constitute a finding that an Offeror is responsible. In evaluating an Offeror's responsibility, the State Standards of Responsibility [R.19-445.2125] and information from any other source may be considered. An Offeror must, upon request of the State, furnish satisfactory evidence of its ability to meet all contractual requirements. Unreasonable failure to supply information promptly in connection with a responsibility inquiry may be grounds for determining that you are ineligible to receive an award. S.C. Code Section 11-35-1810.

Complete requirements, terms and conditions can be found at [Procurement Services \(sc.gov\)](https://www.peba.sc.gov/procurement-services) under the heading Client Services Vendor to Facilitate and Support Program Activities (Solicitation #: PEBA0122016).

The contact person for this intent to sole source is:

Georgia Gillens, CPPO, CPPB, NIGP-CPP
Procurement Officer
SC Public Employee Benefit Authority
(803) 734-0010
ggillens@peba.sc.gov

Qualified vendors should contact Georgia Gillens prior to the contact deadline: July 24, 2024; 10:00 AM Local Time.