TOWN OF OYSTER BAY
DEPARTMENT OF HUMAN RESOURCES
NASSAU COUNTY, NEW YORK

REQUEST FOR PROPOSALS (RFP)

FOR

FLEXIBLE SPENDING ACCOUNT & DEPENDENT CARE PROGRAM

ISSUANCE DATE: November 23, 2026

RESPONSE IS DUE BY: December 7, 2026

DELIVER TO: TOWN OF OYSTER BAY
Department of Human Resources
54 Audrey Avenue, 3rd Floor
Oyster Bay, NY 11771

[Consideration will only be given to responses received before 4:45pm]

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AUTHORIZED CONTACT PERSON: Prospective providers are advised that the authorized Town of Oyster Bay contact person for all matters concerning this RFP is:

Christine Wieczorek, Assistant to the Commissioner of Human Resources
Town of Oyster Bay
Department of Human Resources
54 Audrey Avenue, 3rd Floor
Oyster Bay, NY 11771
Telephone: (516) 624-6425
E-mail: personnel@oysterbay-ny.gov

INTRODUCTION: In accordance with the qualification-based consultant procurement policy of the Town of Oyster Bay (hereinafter referred to as "the Town"), the Department of Human Resources is seeking proposals from qualified professional firms to be an Administrator and provide both a Flexible Spending and Dependent Care Program, as set forth more fully in the "Scope of Service."

FORM OF PROPOSAL: Any provider wishing to be considered under this RFP must submit its proposal with additional relevant information. Proposals should be organized as described on page 5 herein. RESPONSE IS DUE BY DECEMBER 7, 2026, NO LATER THAN 4:45PM. All proposals should be delivered to Town of Oyster Bay, Department of Human Resources, 54 Audrey Avenue, 3rd Floor, Oyster Bay, NY 11771 or emailed to personnel@oysterbay-ny.gov. Faxed responses will be not be accepted.

CONTRACT TERM: All services shall be performed for one (1) year from January 1, 2027 through December 31, 2027, with two (2) extensions at the Town's option, each extension being one (1) year in length.

CRITERIA FOR EVALUATION: In accordance with Town of Oyster Bay Procurement Policy Resolution #154-2021, the criteria to be used by the Town in evaluating proposals received in response to this RFP shall include the following:

- The experience and knowledge of the provider in assignments of similar size, scope, and complexity;
- Size, staffing, resources and financial capability of the provider;
- Past performance with municipalities similar to the Town of Oyster Bay in regard to services;
- Time constraints and deliverability of service;

CONTRACT TERMINATION: Either party shall have the ability to terminate the contract for any reason with thirty (30) days written notice without the Town incurring any termination fee. The Town shall also have the right to immediately terminate a contract or a part thereof before the work is completed in the event of one or more of the following:

A. Previous unknown circumstances arise making it desirable in the public interest to void the contract.

B. The proposer is not adequately complying with the specifications.
C. The proposer refuses, neglects, or fails to supply properly trained or skilled supervisory personnel and/or workers or proper equipment.
D. The proposer in the judgement of the Town is unnecessarily or willfully delaying the performance and completion of the work.
E. The proposer refuses to proceed with work as directed by the Town.
F. The proposer abandons the work.

In the event that the Town must immediately terminate the contract, the Proposer will be paid for all work completed prior to the termination.

SCOPE OF SERVICES: The Scope of Services ("Scope") outlined below has been established for the purpose of achieving and implementing program goals and objectives described in this RFP.

FLEXIBLE SPENDING ACCOUNT ADMINISTRATION:

- Administration of Flexible Spending Accounts and Dependent Care Assistance Programs.
- Maintenance of individual employee accounts and contribution records.
- Processing and reimbursement of eligible claims.
- Verification of eligible expenses in accordance with IRS guidelines.
- Management of applicable annual contribution limits and account balances.
- Administration of applicable carryover and grace-period provisions.

CLAIMS PROCESSING AND REIMBURSEMENT:

- Timely review and processing of employee reimbursement requests.
- Ability for claims to be submitted electronically through a secure online portal.
- Direct Deposit reimbursement option
- Access for employees to be able to view claim status and account balances.
- Clear communication regarding denied, incomplete or pending claims.

EMPLOYEE SERVICES AND COMMUNICATION:

- Dedicated customer service support for Town employees.
- Assistance with account questions, claims and reimbursement procedures.
- Employee enrollment materials and educational resources with support during annual open enrollment periods.

COMPLIANCE AND REPORTING:

- Administration in accordance with applicable IRS regulations and federal requirements, including Section 125 of the Internal Revenue Code.
- Assistance with required plan documentation and amendments.
- HIPAA privacy and security compliance, as applicable.

- Town representative to have access to routine reporting and employee account information.

FORMAT OF PROPOSAL: Proposals should be organized in a fashion to include the following information, at minimum:

A. Letter of introduction;
B. Company overview with names and qualifications of key personnel;
C. Comprehensive description of per-participant administrative fee;
D. Enrollment, implementation and transition fees;
E. Annual or monthly administrative fees. Please include fees for 2027, as well as the anticipated fees for each option year (2028 and 2029);
F. Experience serving municipal & government employers;
G. Copy of your company contract agreement; and
H. Current certificate of insurance