



Dodge County Schools
720 College Street
Eastman, GA 31023

Request for Qualified Brokerage Services
Employee Benefits Plan
January 1, 2019

Sealed Responses Due By:

2:00 PM
July 6, 2018

Sealed Responses Due To:

Georgette Evans

All questions should be addressed to Georgette Evans, CFO, via email at gevans@dodge.k12.ga.us, 720 College Street, or faxed to (478) 374-6697.

Table of Contents

- I. Overview
- II. RFQ Process and Timeline
- III. Scope of Services
- IV. Vendor Response to RFQ
- V. Evaluation
- VI. Questionnaire
- VII. References
- VIII. Supporting Documents
- IX. Submitting of Response

I. Overview

Dodge County Schools (DCS) is seeking to establish a long-term relationship with a broker/consultant for the purpose of strategically planning, designing, and negotiating a comprehensive benefits package that is designed in response to employees' needs and desires that will allow for financial security and affordable benefits. The selected broker shall assume responsibility for the education, communication, and delivery of the benefit package to employees in an efficient and innovative approach and provide day-to-day consultation on plan interpretation, problem resolution, and other administrative services.

DCS has approximately **480** benefit-eligible employees.

In addition to the health insurance coverages provided by the Georgia Department of Community Health, the DCS offers the following group benefits plans through various carriers:

- Short/Long Term Disability Insurance
- Basic Life Insurance
- Supplemental Life/AD&D Insurance
- Permanent Life Insurance
- Dental Insurance
- Vision Insurance
- Cancer Indemnity & Critical Illness Insurance & Hospital
- Flexible Spending Plans for Health and Dependent Care

DCS will not contribute any funds toward the cost of the above referenced group plans with the exception of the **Vision/Dental/basic life insurance**. The new plan year will be from January 1 through December 31.

II. RFQ Process and Timeline

The timeline for the Request for Qualified Brokerage Services (RFQ) process is as follows:

- Release of RFQ June 15, 2018
- Responses Due From Vendors July 06, 2018
- Review Responses to RFQ TBD
- On-site Interviews of Selected Vendors (If needed) TBD
- Recommendation to BOE TBD
- Notification of Decision to All Vendors TBD

The dates, times, and sequence of events related to this RFQ shall ultimately be determined by DCS and is subject to change.

All questions concerning this RFQ must be submitted in writing, either via email or fax, to Georgette Evans at gevans@dodge.k12.ga.us, or faxed to (478)374-3783. The DCS reserves the right to decline to respond to any question if, in the DCS's assessment, the information cannot be obtained and provided in a timely manner. **Vendors/proposers may not discuss needs and/or requirements of the DCS, any aspect of this RFQ, the existing employee benefit package, or any technical questions with any employee of the DCS, or Board Member, other than with Georgette Evans or Mike Hilliard who are the only individuals authorized to answer any questions submitted in writing from vendors.**

Vendor responses must follow the format outlined in this RFQ. Vendors must respond to each question and information request. Failure to comply with this directive may result in disqualification of the vendor response.

DCS shall not be liable for any expenses incurred by any party in connection with this RFQ. This RFQ does not obligate DCS to award a contract or agreement to any individual or company. DCS reserves the right to amend, modify, or cancel this RFQ without prior notice, at any time, with sole discretion.

DCS reserves the right to reject any or all proposals and to waive any technicalities or informalities. DCS reserves the right to seek clarification of a response and verification of information contained in the response.

All responses will be evaluated to determine if the vendor can meet the minimum qualifications set forth in this RFQ.

III. Scope of Services

DCS is seeking to interview Brokers that provides continuity of services in the rapidly changing area of employee benefits. The selected vendor will provide the following services:

- Analyze the current employee benefits package as to degree of sufficiency to meet current faculty and staff needs. Recommend any needed changes to increase the value and quality of the employee benefits package.
- Evaluate, compare, and market the plans to secure the best products, services, and value for all employees.
- Prepare and update the Section 125 Cafeteria Plan on an on-going basis to ensure compliance with federal legislation.
- Provide services to package, communicate, educate, and deliver the benefits in a way which assists all employees in determining personal needs, in assessing the benefits, and in effectively utilizing the benefits.
- Provide strategic planning input, problem resolution, general administration of products and services, metrics, and reporting of enrollment and performance, due diligence in product marketing and recommendations, and enrollment support services.

DCS will only fund the current benefit plans for each employee as currently providing. The intent of DCS is to contract with a vendor to accomplish the stated scope of services without incurring direct costs to the Dodge County Board of Education.

IV. Vendor Response to RFQ

DCS recognizes the amount of effort necessary to prepare a response to this RFQ and it is the vendor's decision to determine the exact level of detail necessary to demonstrate prerequisite experience and capabilities to perform DCS's expectations.

The response to the RFQ shall include comments and answers to all questions listed in the Questionnaire section of this RFQ. The response shall be prepared in a straightforward manner with concise delineation of the vendor's capabilities to satisfy the requirements of the RFQ. To make this task more manageable for DCS evaluators, the response shall be prepared in the prescribed format as noted below:

- A Cover Sheet shall include the full legal name of the vendor, address, phone number and website address. In addition, the Cover Sheet shall identify the individual contact name for all matters related to this RFQ, phone and email address of the identified contact. The Cover Sheet must be signed by an owner, corporate officer, or agent who is authorized to obligate and sign contracts on behalf of the vendor.
- The Questionnaire section includes topics with multiple questions for each topic. The vendor response shall clearly identify each topic as a separate section and identify each question followed by the answer and/or comments.
- The Supporting Documents section allows the vendor to include any additional documentation to support answers and comments to the questions. Each document shall be clearly identified by the topic and question that it references.

V. Evaluation

The DCS will deem the vendor response as qualified only if the response satisfactorily meets the minimum requirements as stated below:

- The vendor must have successful experience in providing similar services to a client(s) of comparable size and complexity as that of DCS.
- The vendor must have been in business a minimum of five (5) full years and have experience negotiating and administering employee benefit programs with multiple carriers.
- The vendor must be headquartered in Georgia or have a significant account management presence in the State of Georgia.
- The vendor response is prepared in the prescribed format as outlined in this RFQ.

In addition, the evaluation will be based on the vendor response to all questions and, if needed or desired, but not required, on-site interviews of selected vendors. It is the goal of DCS to select a vendor that will best serve the needs and interests of the Dodge County Board of Education and its employees.

VI. Questionnaire

A. Company Overview

1. Introduce and provide a brief background on your firm, its history, including year of establishment and number of employees.
2. Is your firm a subsidiary or parent of any other company, including insurance companies? If yes, explain.
3. Provide a brief description of the dedicated team that will service DCS, including specific ongoing services he/she will provide to our district.
4. For each of the following per group size categories, provide at least two (2) client references, all products your firm provides the client, and any services provided daily to the client. The group sizes are (a) fewer than 500 lives; (b) 500 – 1,499 lives.
5. Explain why your firm is uniquely qualified to provide employee benefits administration and brokerage/consulting services to DCS.

B. Implementation and Enrollment

1. Describe the manner in which your firm will participate in developing a strategic benefit plan with DCS.
2. Describe your firm’s methodology for insurance product selection and implementation.
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3. Describe your proposed plan for enrolling DCS employees. Include all resources your firm utilizes for multi-location enrollments and your firm’s online enrollment capabilities.
4. If your company is selected, how would you propose we transition our account?

C. Education and Communication

1. Describe your approach in establishing and maintaining a comprehensive benefits webpage. Include the scope and functionality of the information and resources that will be available through the website.

2. Describe the on-going benefits training and education for both HR staff and employees.
3. Describe your preferred method of communication with all staff.
4. Describe the capabilities of your marketing and IT resources.

D. Legal and Compliance

Describe your advisory capabilities in assisting DCS with compliance issues?

E. Compensation and Conclusion

To reiterate, the intent of DCS is to contract with a vendor to accomplish the stated scope of services without incurring direct costs to the Dodge County Board of Education.

1. Provide your recommendation for commission fees to be borne by the selected insurance carrier(s) as broker compensation.
2. Provide a comprehensive listing of any fees or costs related to the outsourcing of services included in this RFQ that will be directly incurred by DCS.
3. Provide complete detail of any exceptions to the services and general terms noted in this RFQ.

VII. Supporting Documents

Please provide a table of contents for all supporting documents provided and the corresponding section and question number it references.

VIII. Submitting of Response

The response to the RFQ is due no later than 2:00 PM, July 6, 2018. The proposal shall be sent to the attention of Georgette Evans, 720 College Street, Eastman, GA 31023. The vendor shall submit seven (7) complete sets of bound responses, and one electronic copy via flash drive.

The response package shall be sealed and clearly identified on the outside as "RFQ-Employee Benefit Broker Services." The response shall follow the format as noted in Section IV, Vendor Response to RFQ. Responses that do not follow the prescribed format or responses that are incomplete may be rejected by DCS.

DCS is not responsible for any delays in the mail and for any responses that are not clearly marked. Any responses received after the deadline will not be considered and will be returned to the vendor.