

Pass Christian Public School District

6457 Kiln-DeLisle Road · Pass Christian, MS 39571

Request for Qualifications

Advertised Bid No: 3202

Employee Benefits Brokerage Consulting and Enrollment Services

Invitation:

The Pass Christian Public School District is soliciting proposals from insurance brokers/consultants qualified and interested in providing employee benefits brokerage consulting and enrollment services for Pass Christian Public School District.

Interested and qualified parties (brokers/consultants) who have demonstrated their ability to perform similar work are invited to submit proposals.

Proposals will be accepted until 10:00 am on March 24, 2021, and will be opened at 10:00 am on March 24, 2021. All proposals should be submitted in duplicate, should be sealed, and clearly marked "RFQ No. 3202 - for Benefit Brokerage Services".

Electronic proposals can be submitted at www.centralbidding.com. For any questions relating to the electronic bidding process, please call Central Bidding at 225-810-4814.

The Pass Christian Public School District will not be responsible for mail delays or lost mail. Therefore, it is suggested that mailed bid proposals be sent as certified mail with a return receipt guarantee.

All proposals must be received by the Pass Christian Public School District's Office of the Superintendent located at 6457 Kiln DeLisle Road, Pass Christian, MS 39571, no later than **March 24, 2021, at 10:00 AM** Central Standard Time. Any bid proposals received after the specified date and time will not be accepted and will remain unopened on file for 90 days.

The bid proposal must be signed by a company official authorized to bind the organization to its provisions.

Receipt or acceptance of a proposal does not imply commitment or obligation on the part of the Pass Christian Public School District to fund any bid proposal submitted.

If the agency is closed for any reason, including but not limited to: acts of God, strikes, lockouts, riots, acts of war, epidemics, governmental regulations superimposed after the fact, fire, earthquakes, floods, or other natural disasters (the "Force Majeure Events"), which closure prevents the opening of bids at the advertised date and time, all bids received shall be publicly opened and read aloud on the next business day that the agency shall be open and at the previously advertised time. The new date and time of the bid opening, as determined in accordance with this paragraph, shall not be advertised, and all bidders, upon submission of a bid proposal, shall be deemed to have knowledge of and shall have agreed to the provisions of this paragraph. Bids shall be received by the agency until the new date and time of the bid opening as set forth herein. The agency shall not be held responsible for the receipt of any bids for which the delivery was attempted and failed due to the closure of the agency as a result of a Force Majeure Event. Each bidder shall be required to ensure the delivery and receipt of its bid by the agency prior to the new date and time of the bid opening.

Proposals should be submitted to:

PROPOSAL, SUBMITTED IN RESPONSE TO
ADVERTISED BID No. 3202
March 24, 2021 at 10:00 am
ATTENTION: Paige Broman

Please note that Pass Christian Public School District is not asking for, nor authorizing solicitation of quotes from insurance carriers.

Background on Pass Christian Public School District:

Pass Christian Public School District is located in Pass Christian, Mississippi, and employs 266 employees. The breakdown of our employee base is as follows:

Administration – 15	Teachers – 151
Clerical – 30	Teacher Assistants – 31
Principals – 4	Nurses – 4
Assistant Principals – 5	Cafeteria/Bus Workers – 26

The Business and Finance Department is responsible for overseeing the voluntary benefits program for the Pass Christian Public School District. For specifications or any questions regarding this RFQ, contact Paige Broman, Chief Financial Officer at (228)255-6200.

Current Benefit Programs: (all voluntary and employee pays 100% of premiums)

- | | |
|------------------------|--------------------------|
| • Dental Insurance | • Hospital GAP Plan |
| • Vision Insurance | • Cancer Insurance |
| • Critical Illness | • Accident Insurance |
| • Tax Shelter Annuity | • Life Insurance |
| • Disability Insurance | • Section 125 Management |

Scope of Services:

The Pass Christian Public School District is seeking a broker/consultant to perform the full range of services related to the design, implementation, maintenance, communication, and improvement of the Pass Christian Public School District voluntary benefits program. This includes, but is not limited to:

- Assists the Human Resources (HR) and Business Office in administering all voluntary benefits plans, responding to questions from the HR and Business Office, and providing other related services throughout the

year.

- Assists the Pass Christian Public School District in complying with all applicable laws and regulations related to employee benefits.
- Reviews all claims experience, claims services, and claims administration with all carriers offering voluntary benefits to Pass Christian Public School District employees.
- Release proposals for all voluntary benefits, analyze proposals, and make recommendations to the Pass Christian Public School District.
- Ensure that open enrollment is conducted annually during October.
- The broker is responsible for conducting open enrollment and enrolling employees in all available voluntary benefits.
- Provide Pass Christian Public School District business office with one (1) comprehensive billing that includes all voluntary benefits and ensure that reconciliation and transfer of funds are performed electronically.

Questions:

Company background and information

- a. Briefly describe your firm's history, number of employees, and number of years that you have been performing these similar services.
- b. Discuss any impending changes in your organizations that could impact your delivery of services.
- c. Provide the organizational structure of the team that you propose to advise the Pass Christian Public School District, including names, contact information, brief biography, and the responsibilities that you propose for the team. What is their current caseload?
- d. Please provide three (3) current references that you perform similar services for and include; name of entity, contact person, contact number, contact email address, physical address, length of time that you have been performing these similar services, and size of the employee base.
- e. Please provide proof that your company carries errors and omissions insurance and ensure that you include the limits.

Your practice

- a. Describe what makes your firm uniquely qualified to work on our account.
- b. Please provide an overview of your brokerage/consulting services.
- c. Describe the training that your firm provides to the employees that you are proposing to make up the team that will handle our account.
- d. In your opinion, what are the major benefit challenges facing companies today and how will your firm help the Pass Christian Public School District meet these challenges.
- e. Do you have the ability to design, arrange, and analyze employee surveys concerning their opinions about their voluntary benefits? How would you perform such a survey?
- f. What is your philosophy on customer service?
- g. How does your firm determine which carrier is the 'best fit' for the Pass Christian Public School District?

Expertise

- a. How does your communication team approach wellness/health and productivity communications?
- b. What methods can you provide to assist us in presenting benefit information electronically to employees?

- c. Describe your process for negotiating renewals.
- d. Describe a few innovative ideas you have provided to other clients that have a similar benefits package as Pass Christian Public School District.
- e. Please describe voluntary benefit services available.
- f. Describe any additional services offered by your firm that may be of interest to us.

Legislative/Compliance

- a. Describe your company's philosophy concerning maintaining and transmitting client records to ensure HIPAA compliance.
- b. Describe how you assist clients with compliance-related issues.
- c. Do you have an internal ERISA council or do you utilize an external resource? Please describe.
- d. Please describe the qualifications of the persons on the council or the external resource.
- e. Are there any fees for your firm to provide these brokerage/consulting services? If so, what are the fees? Any pricing quotes should be all-inclusive.

Right to Adjust or Reject Bid Proposals

The Pass Christian Public School District reserves the right to reject any or all bid proposals of any company or vendor and waive formalities. Furthermore, the Pass Christian Public School District reserves the right to adjust quantities of materials/resources involved under any item in accordance with the unit prices submitted as part of the proposal.

All awards will be based upon the availability of funds. The Pass Christian Public School District reserves the right to terminate or modify any part of this procurement process at any time and for any reason; to award one (1) contract or multiple contracts; to negotiate changes; to make no awards, and to issue new and/or revised policies and clarifications at any time. If it becomes necessary to revise any part of the advertised bid, addenda will be provided to all companies/vendors who received the original advertised bid packet through written communication delivered by the United States Postal Service and/or by e-mail.

Presentations

Vendors may be required to make an oral presentation to the Pass Christian Public School District evaluators if clarification of a bid proposal is necessary to make a proper evaluation. A company's original bid proposal cannot be changed in any aspect as a result of an oral presentation. The oral presentation is only intended to provide an opportunity for vendors to clarify specific portions of their proposal. Oral presentations will be arranged at the discretion of the Pass Christian Public School District and will be by invitation only.

Evaluation and Awarding of Bid

The bid award will be based on the quality of response, company/vendor qualifications and references, proposal plan, and cost with priority given to best values considering the price, conformance to specifications, and ability to deliver products, features, and services within the allotted time-frame. All submitted proposals will be reviewed and evaluated by school district officials who have a legitimate interest in the products and/or services.

All prospective vendors will be notified of the decision regarding the bid award.

Submission Cover Sheet and Configuration Summary

Provide the following information regarding the person responsible for the completion of this proposal. This person will be the individual that the Pass Christian Public School District should contact for questions and/or clarifications.

Company/Vendor	
Organization Name	Federal Tax ID Number
Contact Person	Phone Number
Physical Address	Mailing Address
E-mail Address	Fax Number
<p>I, hereby, declare that the information provided in this proposal is active, valid, and full disclosure of the requested information. I am fully authorized to represent the organization listed above, to act on behalf of it, and to legally bind it in a matter related to this bid proposal.</p> <p>Subject to the acceptance by the Pass Christian Public School District, the Company/Vendor acknowledges that by submitting a bid proposal and signing in the space indicated below, the vendor is contractually obligated to comply with all items in this advertisement. If no Proposal Exception Form is included, the company/vendor indicates that there are no exceptions to the proposal being submitted.</p> <p>The Company/Vendor further certifies that the organization represented here is an authorized dealer in good standing of the products/services included in this proposal.</p>	
Name	Title
Authorized Signature	Date