SOUTH PARK CONSOLIDATED INDEPENDENT SCHOOL DISTRICT
Herman Smith
Director of Purchasing

REQUEST FOR QUALIFICATIONS TO SELECT
GROUP HEALTH BENEFITS CONSULTANT
RFQ#040804-4

South Park Consolidated Independent School District Is soliciting Statements of Interests and Qualifications for insurance firms with Texas registration. If interested in providing professional services to our district for this program, please complete the attached questionnaire and return it with related materials to:

South Park Consolidated Independent School District
Attention: Herman Smith, Director of Purchasing
4367 Interstate 10 East
Baytown, Texas 77521

For due consideration, submissions should be delivered to the address above on or before April 8, 2007.
Employee Benefit Consulting Services REQ
South Park ISO

The Human Resources Department of South Park ISD, Baytown, Texas, (hereinafter referred to as the “District”) is seeking proposals from qualified employee benefit consultants. The District wants to develop a strategic employee benefit plan(s) that will address rising healthcare cost and identify innovative approaches to administering and selecting health plan options to control costs.

1.0 INTRODUCTION

The District’s Human Resources (HR) Department is responsible for the administration of self-funded health plan for District employees. It is the goal of HR to provide a competitive and affordable (according to market standards) health plan which is accessible to all eligible employees at the level(s) that is most appropriate for their individual circumstances. The health plan currently averages a total enrollment of 2,000 employees per month, with approximately ______ lives. In addition, the District wishes to review from time to time all of its benefit programs to determine their level of competitiveness with other districts and area employers.

2.0 SPECIFICATIONS

A list of service requirements and engagement responsibilities include, but may not be limited to:

1. Provide expert analysis and interpretation of utilization data, costs and variances on a monthly basis. Provide the District underwriting data and evaluation services to support contract modifications such as benefit differentials and funding options.

2. Provide expert financial consultations to include fund budgeting and IBNR reserve analysis.

3. Develop plan design recommendations and plan improvement opportunities.

4. Provide expert assistance in promoting wise utilization of health benefits including the deployment and evaluation of disease management services.

5. Determine premium rates.
6. Assist the District in preparing periodic reports to the Board of Trustees and the District Employee Benefit Committee regarding the progress of the various plans.

7. Assist with the preparation analysis, and presentation of vendor proposals, and provide vendor or selection recommendations.

8. Assist with vendor oversight, contract negotiation on renewals, rate guarantees and service modification requests.

9. Assist with vendor service issues including implementation and problem resolutions.

10. Assist with conducting employee open enrollment meetings.

11. Advise the District on an ongoing basis about changes in law and their effect on the benefit plans.

12. Assist the District with premium funding projections during its annual budget process. Review long term healthcare contribution philosophy and budgetary agenda and best apply those resources to a meaningful long term benefit package.

13. Provide the District with overall plan management and quality assurance services including, but not limited to the following:
   - Claims reporting
   - Benefit design
   - Stop-Loss management
   - Plan administration and claims paying services
   - Regulatory compliance and reporting
   - COBRA t HIPAA
   - Open enrollment
   - Cafeteria plan administration
   - Cost containment

14. Act as the District’s representation to all outside insurance vendors; collecting Information and making periodic presentations of their offerings.

15. Provide periodic comparisons of plans of benefits and employer / employee contributions of area school districts and comparable business.

3.0 CONTRACT EFFECTIVE DATE AND TERM

The target effective date of this contract is for a term of one (1) year. While the contract is for a one (1) year term, the District desires a long- term relationship with the consultant selected assuming that consultant’s services meet the requirements and pricing remains competitive. For this reason, the contract term will be renewable for five (5) additional one (1) year terms after the initial term of the contract at the District’s option, subject to funding and approval by District administration.
4.0 CONSULTANT INSURANCE

Consultant will provide insurance for the full term of the contract to include Professional Liability, with limits of $1,000,000.00 or greater per occurrence and $1,000,000.00 Aggregate. Please provide a copy of the Certificate of Coverage in your proposal.

5.0 EVALUATION FACTORS

Selection will be made of the proposal most advantageous to the District, as determined by the District, based upon the District’s evaluation of the consultant’s responses to proposed requirements contained in this request. In addition, Interviews and presentations by consultant finalists may be a part of the evaluations. The District will conduct a comprehensive, fair and impartial evaluation of all Proposals received in response to this RFP. Each Proposal received will first be analyzed to determine overall qualifications under the RFP, determined by the consultant’s response to this REP. The evaluation will determine the responsiveness and acceptability of each proposal and evaluate each proposal based on the following criteria.

1. Participate in interlocal agreements or service contracts specializing in public entities.
2. Experience with self-funded plans.
3. Work history and experience in public sector.
4. Economic evaluation of the proposed fee schedule.
5. Qualifications and experience of personnel assigned to work on the District account.
7. Availability of personnel to work with the District.
8. Responsiveness to the RFQ including, but not limited to the following information provided1 as well as thoroughness, clarify and conciseness of the proposal.
9. Any other related criteria that a private business and / or public entity would consider.
6.0 CONSULTANT QUALIFICATIONS QUESTIONNAIRE

The District’s Administration is interested in entering into a long-term relationship with an employee benefit consultant who is able to maximize the value of the benefit program. This will require a consultant who is experienced with school districts in Texas and / or other public entities, and who is available and accessible to the Staff. To assist in the evaluation of qualifications please answer the following questions.

1. Please explain what separates your company from its competitors and what specifically qualifies you to be a consultant for the District.

2. Please disclose your past and present financial relationship to any and all Insurance companies, Third Party Administrators (“TPA”), and any other providers of services. Be specific relating to disclosure of types of income including commissions fees and overrides.

3. What services do you provide to self-funded health plan clients? Be specific relating to areas of expertise, and duties performed.

4. Please describe which of the following services you have provided to your clients as well as the most significant findings of each.
   a. Claims audits of a TPA or Insurance company for a self-funded health plan.
   b. Deployment of specialized Disease Management Programs.
   c. Establishment and negotiation of local direct provider contracts for specific health related services.

5. Please list the number and types of RFQs you have conducted in the past 12 months for school districts or public entities. Provide one real example of savings realized as a result of a single RFP.

6. Please list three of your most significant accomplishments on behalf of a Texas Independent School District or public entity. For each accomplishment, please include a client or former client with phone number who can confirm each accomplishment.

7. Please list the due diligence steps you normally conduct before recommending an employee benefit vendor. Also, what due diligence steps would you recommend on a long standing benefit vendor not currently out for bid?
7.0 REQUIRED INFORMATION

For the purpose of evaluating competency and experience, the degree of relevant experience and accomplishments with Texas Independent School Districts or other public entities will be a primary factor. The District is especially interested in the competency and the experience of the individuals who would be directly providing services to the District.

a. Please provide resumes of those consultants who would be working directly with the District's account,

b. References from three former and three current clients, including contact name, e-mail address, telephone number and the service provided. References must be of similar size and nature to the District.

c. Please provide an outline of hourly rates for your services, as well as any proposed fee schedule you would like to have considered.

d. Provide a sample consulting contract utilized for public entities, including a Scope of Service.

e. Provide a company overview, mission statement and/or approach to an employee benefit consulting engagement. Include any website information availability.


g. Copy of Insurance License(s) for all consultants assigned to the project.