



Request for Proposal

Employee Benefit Programs Consultant RFP #CML-08042011

09/15/2011

Issued by:

**Purchasing Division
96 S. Grant Avenue
Columbus, OH 43215**

Deadline for Submittal:

September 29, 2011

No later than 12:00pm EST

Request for Proposals for Employee Benefit Programs Consultant

PURPOSE

The Columbus Metropolitan Library (the Library) is requesting proposals from a licensed professional and qualified Benefits Consultant to provide professional services related to the Library's Group Health Plan.

Working in partnership with Library staff, the selected consultant will review, analyze and make recommendations for the employee health and wellness plans to manage an Employee Health Benefits Program that will help us attract and retain top quality employees. The Library is particularly interested in a Benefits Consultant who can offer creative, innovative approaches that help us maintain quality and contain cost without sacrificing fiscal soundness.

It is the Library's intent to hire a consultant who is an independent, unbiased, and not affiliated with any institution that may bid for services for the Library. This invitation to submit a proposal is not an authorization to approach any insurance market. We specifically direct that no solicitation of insurance markets be made on behalf of the Library at this time.

GENERAL INFORMATION

Columbus Metropolitan Library consists of a Main Library and 21 branches within the city of Columbus and throughout Franklin County, Ohio. The Library has 785 employees (742 eligible for benefits) on both a full and part-time basis at managerial and non-managerial levels. Positions are professional, paraprofessional, technical, clerical and service in nature. The Library currently provides the following benefits to its employees:

- Choice of two medical plans (PPO or HRA), self-funded, carved out Prescription drug plan
- Dental plan
- Vision plan
- Life, STD, LTD and Long-term Care programs
- Employee Assistance Program (EAP)
- COBRA administration
- Flexible Spending Accounts for Dependent Care and Medical

The initial contract term and first optional year of the contract will require general employee benefit program services to be performed on an ongoing basis

The contract term will be for three (3) years and 2 months with the option to renew for two additional one-year periods, subject to the mutual consent of both parties and upon the approval of appropriations to pay for the services. The initial contract term shall be from November 1, 2011 - December 31, 2014.

PROPOSED SCOPE OF SERVICES

A. General Employee Benefit Consulting Services and Requirements

The following is a list, but not all-inclusive, of Employee Benefit Consulting Services that may be required during the term of this contract:

1. Conduct evaluations and provide assistance on miscellaneous health care matters as they arise in the Library's health care program,
2. Perform marketing of insurance plans on an annual basis,
3. Provide overviews and presentations to the Board of Trustees and/or Senior Leadership Team as required,
4. Research the Library's health care benefits plan and make recommendations for enhancements or alternate plans,
5. Make recommendations and presentations to management committees,
6. Assist with plan(s) administration and execution,
7. Provide the Library with cost analysis of benefit programs,
8. Conduct or oversee actuarial services,
9. Provide the Library with trust fund reserve calculations, funding, non-discrimination testing for Section 125 plans and IBNR evaluations, and
10. Be available as needed to answer questions and resolve issues that arise during the year regarding the employee benefits contract administration and service provisions.

B. Employee Benefit Plan Request for Proposal Development, Evaluation, and Related Services

The consultant shall assist the Library in conducting the selection process for service providers. The procurement process will be for Requests for Proposals, and shall be conducted in accordance with ORC requirements and the Library Board of Trustees Policy. The consultant must be qualified and competent to analyze the Library's utilization and compare RFP responses to it, evaluating the following information:

1. Provider network size and geographic distribution,
2. Physician specialties,
3. Quality credentialing,
4. Discount arrangements,
5. Overall proposed program administration and process,
6. Resources that would be required of the Library,
7. Net administrative cost with 100% documented discount pass-through,
8. Physician reimbursement methodologies and respective value to the Library and its employees,
9. Employee participation requirements,
10. Implementation plan and timeframe,
11. Company financial stability,
12. Expertise in managed health care,
13. Experience with public employers,
14. Available resources, and
15. Ability to duplicate the Library's existing benefits.

As requested, the consultant will assist with or provide:

- Communication with the Library's Management Team as required throughout the process,
- Ongoing conferences as needed,
- Review and update specifications for all benefit program RFPs,
- Prepare a final report with analysis and basis for vendor selection for contract awards using pre-determined evaluation criteria,
- Assist plan administrator with implementation of healthcare legislation, contract negotiations and implementation, and
- Provide an overview and presentation to the Board of Trustees and/or Senior Leadership Team as required.

PROPOSAL REQUIREMENTS

The offeror(s) is responsible for all information contained in any addenda issued. The addenda shall be returned with the complete RFP proposal packet and proposal response.

All responses shall be in the following prescribed format.

Submission of Proposal Copies. One marked original and FOUR (4) marked copies of the proposal shall be submitted in a sealed package marked with the RFP number. Proposals will be accepted at the location identified and until the time marked on the legal notice of the RFP. The Library is not responsible for any late mail or special service deliveries.

Proposal Instructions

Proposal responses are to be organized and submitted in accordance with the instructions in this section. Responses shall be organized into the following marked sections:

1. Transmittal Letter

A Transmittal Letter on the offeror's letterhead shall be submitted and include but need not be limited to the following information:

- A. The signature of a person authorized to bind the offeror legally to the extent of work and financial obligation outlined in the proposal.
- B. A statement that the proposal will be valid for 180 days.
- C. Identification of all the material enclosures submitted in response to the RFP.
- D. A summary of the submitted offering and a brief statement of the offeror's qualifications to meet the needs as described in this RFP. This information shall include:
 - I. The names of the individuals involved in the preparation of the proposal and their relationships to the offeror.
 - II. The name, address and telephone number of the individual to whom inquiries relating to this proposal shall be directed.

2. Project Overview

The project overview shall provide a description of the manner in which the offeror proposes to implement and administer Employee Benefit Programs Consulting Services for the Columbus Metropolitan Library. Offeror should clearly demonstrate its understanding of the field of employee

benefit services requested in this RFP. The project overview shall highlight how the offeror proposes to meet the requirements of the RFP.

3. Offeror's Qualifications

Information included in this section shall include but not be limited to the following:

- A. Data describing the current corporate organization, date of incorporation, ownership, corporate office, number of years in business, size of business, services offered, corporate ethics statement, number of total employees including percentage of minorities and females, number of personnel engaged in the proposal design and implementation, audited annual report for the last two fiscal years or a statement why an audited report is not available, and a summary of other projects conducted by the offeror that are similar to the project requested in this RFP.
- B. (If applicable) Data describing all subconsultant's current corporate organization, date of incorporation, ownership, corporate office, number of years in business, size of business, services offered, corporate ethics statement, number of total employees including percentage of minorities and females, number of personnel engaged in the proposal design and implementation, audited annual report for the last two fiscal years or a statement why an audited report is not available, and a summary of other projected conducted by the subconsultant that are similar to the project requested in this RFP.
- C. Statement of Affirmation of the Columbus Metropolitan Library Terms and Conditions.
- D. A list of at least three (3) customers as references, preferably, those where services of similar scope and size were performed. Include names of contact persons, addresses and telephone numbers for each reference, as well as a signed written authorization to contact those references and obtain information regarding the delivery of Employee Benefit Programs Consulting Services. Provide any evaluations from these customers of past services performed of a similar nature. If the Library is unable to contact references with the information provided, a lower evaluation score may result.
- E. Include for each subconsultant a list of at least three (3) customers as references: where they have provided a similar service as they will provide in the proposed offering. Include names of contact persons, addresses and telephone numbers for each reference, as well as a signed written authorization to contact those references and obtain information regarding the delivery of Employee Benefit Programs Consultant services. Provide any evaluations from these customers of past services performed of a similar nature.

4. Description of Services and Staffing

Information should include a description of the offeror's proposed resources for the service or services requested in this RFP, including the proposed personnel to be assigned, corresponding vitae, copies of licensure or certifications, and listing of experience. If subconsultants are planned by the offeror, the role of the subconsultant should be explained in this section. A description of the subconsultant's personnel to be assigned to the project along with corresponding vitae and listing of experience should also be included.

In addition, information should be included that describes the offeror's and subconsultant's current workload, availability of necessary personnel, equipment and facilities to satisfy the requirements of this RFP.

5. Response to Scope of Services Requirements

In this section of the response the offeror shall discuss all of the requirements set forth in the Scope of Services section of this RFP, in detail, and explain how the offeror is capable of fully meeting those requirements. This shall include a statement regarding the tasks to be completed by Columbus Metropolitan Library personnel in order to support the services rendered by the offeror.

6. Pricing Proposal

The contract or contracts resulting from this RFP are intended to be a fixed price contract. The price shall include all costs, general and administrative, as well as any profit.

EVALUATION CRITERIA

All responsive proposals will be evaluated by a committee of at least three members and shall be ranked and rated according to the criteria stated below. The Library may select at least two of the highest ranked offerors with which to hold additional discussions. The discussions may include, but are not limited to, presentations, qualifications, proposals, cost estimates, or other pertinent information. The committee may permit revisions of proposals so long as all offerors who are selected for additional discussions are given equal opportunity to revise their proposals.

(15%) A. The competence of the offeror to perform the required service as indicated by the technical training, education and experience of the offeror's personnel who would be assigned to perform the work;

(10%) B. The quality and feasibility of the offeror's technical proposal;

(30%) C. The ability of the offeror to perform the required service competently and expeditiously as indicated by the offeror's workload and the availability of necessary personnel, equipment and facilities.

(25%) D. Past performance of the offeror as reflected by evaluation of the Library and other previous clients of the offeror with respect to such factors as quality of work, success in controlling costs, and success in meeting deadlines; and

(20%) E. The cost or pricing structure of the offeror's proposal.

NOTES

1. Questions regarding this RFP should be emailed to Wanda Dixon – wdixon@columbuslibrary.org. Questions will be accepted until 5:00 p.m., Friday, September 23, 2011.
2. Should any addenda be required, they will be posted in the Columbus Metropolitan Library web-site, Columbuslibrary.org / About Us / Doing Business with the Library at least 5 business days prior to the RFP opening. Offerors are responsible for any information provided in issued addenda.
3. Correct invoices will be paid within 30 days of receipt. Invoices are to detail the services provided, the date and detail costs and are to be submitted on company letterhead, in triplicate to the address on the Library's purchase order.
4. Escalator Clause/Firm Fixed Price

No price adjustment shall be granted during the first twelve (12) months duration of an awarded contract.

SCHEDULE OF EVENTS

Action	Date
RFP Released	September 15, 2011
RFP Proposals Due	September 29, 2011
RFP Finalist Presentations	October 1 – October 7, 2011
RFP Recommendation to BOT	October 19, 2011
Effective Date of Contract	November 1, 2011
2012 Benefit Approval to BOT	Early August 2011
Open Enrollment	October 3 – October 21, 2011

CONFIDENTIALITY AND PROPRIETARY INFORMATION

All information submitted in response to this RFP shall be considered public information and not exempt from disclosure as proprietary information. (Court of Appeals No. 93AP-809 – opinion rendered March 31, 1994).

All proposals shall be kept confidential to the extent permitted by law until a contract has been successfully negotiated.

THIS REQUEST FOR PROPOSAL IS SUBJECT TO THE FOLLOWING CONDITIONS:

If the Columbus Metropolitan Library should receive a public records request to review submissions made in response to this RFP, the Library will notify offerors who may be impacted by the request that such a request was made, and the date that such records will be released to the requestor. If any offeror objects to the release of any information included in their RFP, it will be the responsibility of the offeror, once notified by the Library, to obtain an injunction against the release of that information from a Court of competent jurisdiction within Franklin County, Ohio.

The Contractor agrees to indemnify and hold harmless the Columbus Metropolitan Library their respective members of the Board of Trustees, and all employees and other agents and representatives, against loss, claim, liability in tort or by statute imposed, charge, cost or expense, including without limitation, attorneys fees to the extent permitted by law, which may be incurred in connection with, or in any manner of any damage or loss arising from disclosure of proprietary information.