

November 7, 2022

## REQUEST FOR PROPOSAL: EMPLOYEE BENEFIT BROKER/CONSULTING SERVICES

**Maize USD 266** is seeking written proposals for an insurance brokerage firm to provide Employee Benefit Brokerage and Consulting services. Technical questions or requests for clarification shall be directed, in writing, to the email address below. **Maize USD 266's** responses to a proposer's question(s) will be provided via return email only to the proposer asking the question(s), and not shared with other respondents.

Name	Brandi Clarke Maize USD 266
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Telephone	316-350-2028
Email address	bclarke@usd266.com

### 1. GENERAL INFORMATION

#### 1.1. Key Dates

The following table outlines **Maize USD 266's** key dates and events in this RFP process.

November 7, 2022	RFP is available
November 29, 2022	Questions and Answer Period
November 30, 2022	Deadline for receipt of Proposals
January 9-13, 2023	Oral Interviews with selected respondents
February 1, 2023	Selection completed/contract negotiations begin

**Maize USD 266** reserves the right to extend the submission deadline or any other deadline or date indicated in the RFP in the event that an extension would be in the best interest of the district.

#### 1.2. Background of Maize USD 266

**Maize USD 266** is located northwest of Wichita, KS. The district serves over 7,500 students and has over 1,450 benefits eligible employees. Employees who work over 25 hours a week are eligible for district-sponsored benefits, including but not limited to, medical, dental, vision, life, short-term disability, accidental death and dismemberment, critical illness, accident, hospital indemnity, telemedicine, flexible spending, dependent care, and health savings accounts. The district's plan year runs from October thru September with online open enrollment occurring in early August.

#### 1.3. Preparation Costs

**Maize USD 266** shall not be responsible for proposal preparation costs, nor for the cost, including attorney fees associated with any administrative, judicial or other type of challenge to the determination of the selected proposer and/or award of the contract and/or rejection of the proposal. By submitting a proposal, each respondent agrees to be bound in the respect and waives all claims to such costs and fees.

## 2. RULES GOVERNING PROPOSALS

### 2.1. Confidentiality

The content of all proposals will be kept confidential throughout the selection process and afterward. Copies of any proposal will not be shared with other respondents.

### 2.2. Disposition of Proposals

All materials submitted in response to the RFP shall become the property of **Maize USD 266**.

### 2.3. Modification of Proposals

Modifications to proposals will not be accepted by **Maize USD 266**.

### 2.4. Late Submissions

Proposals not received prior to the date and time specified will not be considered and will be returned to the proposer unopened.

### 2.5. Acceptance/Rejection of Submittal

**Maize USD 266** reserves the right to reject any or all responses to this RFP, to waive minor irregularities in any proposal or in the RFP procedures, and to accept any proposal presented which meets or exceeds these specifications and which is deemed to be in the best interests of the district. However, the requirements for timelines shall not be waived.

### 2.6. Proposal Evaluation

A committee of individuals representing **Maize USD 266** will perform the evaluation of all proposals. Following this evaluation process, the committee may elect to ask certain respondents to complete an oral interview before the committee. The purpose of the interview is to allow those further selected firms expansion and discussion of their written responses.

### 2.7. Oral Interviews

Oral interviews are provided at the sole discretion of **Maize USD 266** and are for the purposes of allowing the district the ability to broaden the understanding of certain selected respondents.

### 2.8. Final Broker Selection

The final selection of the successful respondent(s) is scheduled to be completed by February 1, 2023. The successful respondent will assume their responsibilities for all matters related to the 23-24 plan year.

### 3. MINIMUM QUALIFICATIONS

All brokerage firms submitting a proposal must:

- a. be licensed to do business in the state of Kansas,
- b. have the expertise, licenses and resources to provide Employee Benefit broker/consulting services for **Maize USD 266** current and future operations,
- c. consistently maintain and allocate sufficient staffing resources to provide timely service for **Maize USD 266** Employee Benefit broker/consulting services needs,
- d. maintain staff that are qualified and available to provide specialized technical expertise in various disciplines as necessary.

**Proposers may not contact the insurance marketplace nor discuss our account with underwriters until we have made our final broker selection.**

### 4. PROPOSAL GUIDELINES

Please respond as outlined in this request for proposal and observe the following guidelines:

- a. Respond to questions as directly as possible along with any supporting information you feel will be pertinent to these questions.
- b. Written proposals (**three copies**) must be received at our offices no later than **5:00 pm on November 30, 2022**. Electronic proposals must be emailed to **bclarke@usd266.com** no later than **5:00 pm on November 30, 2022**.
- c. Our final broker selection will be made based on our evaluation of the criteria outlined in Section 5 of this Request for Proposal.

Submission of a proposal will be construed to imply agreement in advance to the services outlined in the enclosed materials. The proposal package should be kept as brief as possible, however, with the subject areas clearly defined.

## 5. QUESTIONS

### 1. Firm History and Experience

- a) Provide a brief history of your firm including size, volume of business, locations, number of years in business and business philosophy.
- b) Describe the visibility and influence of your firm in the employee benefits field.

### 2. Account Team Qualifications

- a) Provide an overview of the account team that would be assigned to **Maize USD 266**. For each member of the team, provide highlights outlining qualifications and experience. Provide a summary of roles and distribution of responsibilities.
- b) Describe your approach to the ongoing training of your staff.

### 3. Clients

- a) Describe at least two innovative strategic solutions you have implemented for clients similar to Maize USD 266 that highlight your benefits consulting expertise.
- b) Describe your internal mechanism for ensuring customer satisfaction with your services.
- c) Provide contact names and phone numbers of 5 references.

### 4. Services

- a) Provide an overview of your approach to strategic planning.
- b) Provide an overview of your account support and administration services, including enrollment coordination and ongoing support for **Maize USD 266** employees.
- c) Describe your capabilities in ongoing plan performance monitoring, plan performance forecasting, claims experience analysis, benchmarking and reporting.
- d) Describe your capabilities in employee communications.
- e) Describe your consulting and educational services in the area of legal compliance.
- f) Describe your use of technology to support online employee services and education.
- g) Describe any additional service options that may be of interest to **Maize USD 266**.

### 5. Describe attributes that make you a valuable strategic partner to Maize USD 266.

### 6. Compensation

- a) Describe how you expect to be compensated for the services outlined in this proposal.
- b) State your philosophy of compensation disclosure.