

RFP - Employee Benefits Insurance Broker and Consulting Services
Pre-Bid Conference / Questions & Answers
October 19, 2011

1. Is it possible to receive the document and corresponding required forms in word and/or excel? [Attachments A-D are available in Word and will be posted on the website.](#)
2. Under Compliance, the District is asking for on-site training. Is there any minimum required training hours? [No – as requested or as needed. There are times when a change such as a new law or negotiated plan design will require more training than normal.](#)
3. Will the broker/consultant be requested to perform a medical marketing for those members in CalPers? [Normally, the broker would not market for CalPERS groups unless we were exploring other options.](#)
4. How long has the District been with their present broker/consultant? [January 2006](#)
5. Under what circumstances does the District consider a vendor a subcontractor and therefore would require detailed information? For example, if a firm uses outside legal counsel to prepare legislative updates, do we need to provide responses to items 15-17 of the Consultant Questionnaire? [Yes, please note what the services are.](#)
6. Does the

26. Annual Renewal Process and Evaluation – who develops communication materials for SCUSD today? What level of communication support is being provided by your current broker? Please elaborate on what SCUSD is looking for as it pertains to communication support. (Page 6, #10) [We currently prepare all our open enrollment material. We would be open to better ways to communicate with employees and exploring any online options. We depend on our broker for compliance issues to include in any open enrollment materials.](#)
27. What is the current administration process and is an online system being used? If so, what system or vendor is being used for online enrollment and administration? Is SCUSD looking to evaluate the current enrollment system and is this part of the scope of this RFP? (Page 7; Other Service Requirements #15) . [Currently, there is online open enrollment on BRMS \(vbas.com\) site for all actives. There is not very high participation. We hope to move to enrollments online for all active and retired employees. Evaluation on the BRMS system online enrollment is not part of the scope of this RFP.](#)
28. Please describe the client communications services received currently by the District's actives and retirees. Is this question referring to a Call Center? (Page 12; #6 Client Communication). [Currently, there is only communication between benefit staff and broker but we would be open to any other input or recommendations.](#)
29. As shown in Appendix E to the RFP, SCUSD has historically developed the liability associated with the retiree medical benefits provided by the District as required by GASB 43/45. Is the District requesting that the successful bidder provide the development of the liability and the required supporting financial information as part of the core services? If so, does this also include assisting the District in analyzing funding options, program design options and other changes to help manage the liability? . [In recent years, the District has contracted separately for actuarial services to determine retiree liability. Broker knowledge and input in this area is appreciated due to our large retiree population.](#)
30. What is the current broker compensation level (commission and/or fees)? [Commission.](#)
31. Page 11, #3 "Qualifications of the Firm" – Please elaborate on what information is necessary regarding project costs with other clients. Typically, we provide overall consulting services rather than specific projects and adherence to a schedule and project budget do not apply. [In most years, that would be true. Have you ever assisted a large employer with a project moving all \(or a large group of employees/retirees\) to another plan?](#)
32. Page 11, #5 "Services" requests a description of the premium volume that our firm handles.

48. Who is the current broker and/or consultant? [Intercare](#)

49. Did the incumbent consultant/broker assist in writing this RFP? [No](#)

50. What are the fees for the broker and/or consultant for the 2011-2012 year? [The current broker receives commission.](#)

Questions asked at Pre-Bid Conference:

51.